

## Charitable Status Does Not Preclude Advocacy

Some mistakenly believe that charitable status is a barrier to advocacy.

This is simply untrue, as Canada Revenue Agency (CRA) guidance<sup>1</sup> makes clear. Here are a few quotes from CRA that sum it up:

- “The rules governing the political activities of charities have been amended to remove the quantitative limits on the resources a charitable organization or charitable foundation can devote to political activities that do not directly or indirectly support or oppose a political party or candidate for public office.”<sup>2</sup>
- “As long as a charity’s public policy dialogue and development activities are carried on in furtherance of its stated charitable purposes, the Income Tax Act places no limits on the amount of such activities that a charity can engage in. In this context, a charity may devote up to 100% of its total resources to public policy dialogue and development activities that further its stated charitable purposes.”<sup>3</sup>
- Public policy dialogue and development activities include advocacy, and other “activities a charity carries on to participate in the public policy development process, or facilitate the public’s participation in that process”:
  - “Providing information – charities may provide information to their supporters or the general public related to their charitable purposes (including the conduct of public awareness campaigns) in order to inform or persuade the public in regards to public policy. Such information must be truthful, accurate, and not misleading.
  - Research – charities may conduct research into public policy, distribute the research, and discuss the research and findings with the media and with others as they see fit. Note that to advance education as a charitable purpose, a charity’s research must meet the criteria in Policy statement CPS-029, Research as a charitable activity.
  - Disseminating opinions – charities may express opinions on matters related to their charitable purposes to participate in developing public policy, as long as they draw on research and evidence and are not contrary to hate speech laws or other legitimate restrictions on freedom of expression.
  - Advocacy – charities may advocate to keep or change a law, policy, or decision, of any level of government in Canada, or a foreign country.
  - Mobilizing others – charities may call on supporters or the general public to contact politicians of all parties to express their support for, or opposition to, a

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<sup>1</sup> Guidance CG-027 "Public policy dialogue and development activities by charities"  
[https://www.canada.ca/en/revenue-agency/services/charities-giving/charities/policies-guidance/public-policy-dialogue-development-activities.html?utm\\_source=stkhldrs&utm\\_medium=eml&utm\\_campaign=PPDDA](https://www.canada.ca/en/revenue-agency/services/charities-giving/charities/policies-guidance/public-policy-dialogue-development-activities.html?utm_source=stkhldrs&utm_medium=eml&utm_campaign=PPDDA).

<sup>2</sup> Government of Canada, "Public policy dialogue and development activities by charities - FAQ, Q.2"  
<https://www.canada.ca/en/revenue-agency/programs/about-canada-revenue-agency-cra/federal-government-budgets/budget-2018-equality-growth-strong-middle-class/public-policy-advocacy-activities-charities/ga.html>.

<sup>3</sup> Government of Canada, "Public policy dialogue and development activities by charities - FAQ, Q.5"  
<https://www.canada.ca/en/revenue-agency/programs/about-canada-revenue-agency-cra/federal-government-budgets/budget-2018-equality-growth-strong-middle-class/public-policy-advocacy-activities-charities/ga.html>.

particular law, policy, or decision of any level of government in Canada or a foreign country.

- Representations – charities may make representations in writing or verbally to elected officials, public officials, political parties, and candidates, and appear at parliamentary committees, to bring their views to the public policy development process, and may release such materials publicly. Note that a charity engaging in this type of activity may be required to register as a lobbyist organization. See Other legal requirements.
- Providing forums and convening discussions – charities may invite competing candidates and political representatives to speak at the same event, or may request written submissions for publication, to discuss public policy issues that relate to the charity's purposes.
- Communicating on social media – charities may express their views, and offer an opportunity for others to express their views, in regards to public policy, on social media or elsewhere."<sup>4</sup>

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