
internal policies to support local ywca advocacy

May, 2007

**eliminating racism
empowering women
ywca**

great lakes alliance region

YWCAs have a long history of advancing equity for women and for communities of color through broad social change efforts. Public policy advocacy is one essential tool we use to advance the YWCA mission, ***eliminating racism and empowering women***. “Advocacy” is a broad term that describes any set of activities aimed at changing policies, systems or institutions. This includes a wide range of research, education, organizing, and lobbying strategies, in which nonprofit organizations may legally engage.

In order to be fully prepared to advocate on behalf of the communities we serve, YWCAs may wish to address several issues related to their internal governance and operations. As YWCAs strive to be leaders in our communities on racial and economic justice issues for women, organizations must be equipped with clear policies and procedures to:

- specify how issues will be identified and adopted
- create a process to implement advocacy strategies
- have a process for consistent, strategic issue communication
- be prepared to lobby within the established parameters for nonprofit organizations
- insure that appropriate internal controls are in place to monitor advocacy activities

This tool kit provides sample policy language that local YWCAs can use to create a unique set of internal policies for advocacy, based on the needs of the organization and local community. Several statements are included under each broad heading. YWCAs may see a need to include one or several of the statements listed in each category, or to use this as a guide in creating original language that best fits the needs of the organization.

If you have questions or would like assistance in developing your own set of internal advocacy policies, please contact the YWCA Great Lakes Alliance Region staff.

Statement of Purpose

- In accordance with the bylaws of the YWCA USA and in the interest of our commitment to eliminating racism and empowering women, YWCA <name> advocates for public policies that serve our communities, enhance our programs, and fulfill our mission. We will be strategic and thoughtful advocates at local, state, and national levels. We will use the following guidelines, principles, and process to consider policy matters and take action.
- This policy provides a mechanism for YWCA <name> to identify, adopt, and promote issue positions in support of the mission.

Issue Identification and Adoption

- The Board of Directors will adopt an advocacy agenda delineating specific issue positions of the YWCA <name>, or individual issue positions as they arise, by a majority vote.
- Recommendations for issues to be adopted by YWCA <name> will be made by <the Public Policy/ Advocacy committee.> <Any board, staff or volunteer member can recommend a policy for consideration by the committee.>
- The Board of Directors will evaluate YWCA USA policy positions for local adoption.
- The Board of Directors and Advocacy committee will use these criteria when evaluating whether to take a stand on an issue:
 - a. The issue has a clear relationship to eliminating racism and empowering women.
 - b. The issue directly or indirectly affects our constituents, programs, or organization.
 - c. The YWCA <name> has organizational knowledge and expertise on this issue.
 - d. The issue is not in conflict with a YWCA USA or YWCA Great Lakes Alliance Region policy priority.
 - e. By taking a public stand on this issue, we will be able to make a demonstrable difference.
 - f. Taking a public stand on this issue will not undermine our organization's community credibility or relationships with funders.
 - g. Taking a stand on this issue is not in conflict with any other policy or position held by the organization.
 - h. We are responding at the right time with regard to the issue.

Issue Promotion and Advocacy Implementation

- An action plan including proposed activities and timeline for implementing and communicating about the advocacy agenda will be developed at the same time that advocacy priorities are finalized and carried out by *<the advocacy committee, designated staff>*.
- Approved issue positions will be used when developing strategic relationships and joining coalitions.
- Approved issue positions will be included in the YWCA's strategic plan and work plans.
- Letters to officials, letters to editors, and open letters to the public on advocacy positions will be signed by *<the Chair of the Board of Directors and the Executive Director.>*
- When the YWCA *<name>* is called upon to join a "sign-on" letter campaign, the letter will be reviewed by the *<advocacy committee chair, Executive Director, Chair of the Board of Directors>* and recommended to the board for approval.
- In the event that an issue demands immediate action at a time when a majority vote is impossible, the *<executive director, board president, chair of the advocacy committee, designated officer or staff person>* is empowered to take action on issues that are consistent with those previously adopted and where there is a direct relationship to the organization's mission and/or existing programs.
- If the *<executive director, board president>* determines that the organization must take immediate action on an issue that has not been reviewed by the full board, she will give 24-hours notice including the relevant details of the issue position to the full board and will receive any appropriate guidance at that time.
- The *<chair of the advocacy committee, advocacy staff person, executive director>* will be responsible for tracking approved issues and providing regular updates on their progress.
- The *<chair of the advocacy committee, advocacy staff person, executive director>* will be responsible for communicating to YWCA staff, board, and members about actions taken in support of approved issues.
- Approved advocacy positions will be reviewed and updated *<annually.>*

Lobbying

- YWCA *<name>* engages in limited lobbying to advance its mission. It is YWCA *<name>*'s policy to adhere strictly to limitations on lobbying expenditures

imposed by the Internal Revenue Service. Lobbying expenditures are reported annually to the IRS on Form 990.

- The YWCA <name> has [has not] elected IRS 501h (IRS form 5768), stating that all lobbying activities will be tracked by expenditure.
- To ensure adherence to this policy, lobbying expenditures must be included in the approved YWCA <name> budget or authorized in advance by the [responsible senior staff]. <Senior staff> will alert the chief operating officer to any significant lobbying expenditures in advance, to facilitate compliance with the limits on direct and grass-roots lobbying expenditures.
- Both expenditures and staff time must be charged to a lobbying project code, which will indicate whether the lobbying is “direct” (aimed at an elected official) or “grass-roots” (aimed at members of the community/ general public).
- In general, using any government funds for lobbying, including using government funds to hire consultants or make grants that involve lobbying is strictly prohibited.
- Foundation grant funds may only be used for lobbying if explicitly permitted in the funders’ guidelines. If a project gets only part of its funding from a foundation, the project can include lobbying, so long as the lobbying expenditures are funded by sources that do not exclude lobbying.
- In each year’s budget request, the <chief executive> is responsible for identifying and labeling any proposed expenditures for lobbying.
- In carrying out the approved budget, the <chief executive of field office> is responsible for accurately recording the actual allocation of staff time and other expenditures for lobbying.
- Staff members are responsible for obtaining authorization before incurring any unbudgeted expenditure for lobbying. Requests for authorization are to be submitted to the <designated senior staff>.
- Staff members whose job includes lobbying on behalf of the organization will consult with their direct supervisor regarding the advisability of registering as a lobbyist through the Secretary of State’s office.

Political Activities and Electioneering

- YWCA <name> encourages individual participation in civic affairs. However, as a charitable organization, YWCA <name> may not make contributions to any

candidate for public office or political committee and may not intervene in any political campaign on behalf of or in opposition to any candidate for public office.

We therefore

- Refrain from making any contributions to any candidate for public office or political committee on behalf of YWCA.
 - Refrain from making any contributions to any candidate for public office or political committee in a manner that may create the appearance that the contribution is on behalf of YWCA.
 - Refrain from using any organizational financial resources, facilities, or personnel to endorse or oppose a candidate for public office.
 - Clearly communicate that we are not acting on behalf of the organization, if identified as an official of YWCA, while engaging in political activities in an individual capacity.
 - Refrain from engaging in political activities in a manner that may create the appearance that such activity is by or on behalf of YWCA.
- The YWCA <name> will comply with federal election laws when engaging in any activity related to elections including candidate forums, get-out-the vote campaigns, voter education and voter registration events, and other permissible activities.
- The YWCA <name> will make its facilities, mailing list, program advertising space and other goods or services available to any candidate for public office at fair market value. Use of such items will not be restricted to any candidate based on her party or affiliation.
- YWCA <name> and its employees may not endorse, work for, or otherwise support a candidate for public office at any level (federal, state, or local). Likewise, no candidate may be opposed. No funds or resources of YWCA <name> may be used to support or oppose any candidate.
- YWCA <name> will not engage in electioneering through any coalition of which it is a formal or informal member.
- Individuals employed by the YWCA <name> are permitted to engage in partisan electioneering activities during after-work hours, while on leave without pay, or while using accrued vacation. Such activities must be clearly undertaken, *not* as a representative of YWCA, but solely in the individual employee's capacity as a private individual. YWCA employees should not to identify themselves as speaking or acting on YWCA's behalf; and should not be identified as being employed by YWCA in any printed campaign materials or in any public forum.

- No YWCA funds or resources (e.g., photocopying, postage, telephones, etc.) may be used in your personal electioneering activities.

Some statements excerpted or adapted from *The Nonprofit Policy Sampler, Second Edition* by Barbara Lawrence and Outi Flynn, a publication of BoardSource. BoardSource © 2006.