

UNITED WAY OF CHITTENDEN COUNTY ADVOCACY POLICY

Effective July 2013

I. Introduction

The policy of United Way of Chittenden County (“UWCC”) is to advocate for our Community Impact goals, focusing on the building blocks for a better life: Education, Income, and Health.

The purpose of this document is to lay out general guidelines for UWCC’s Board of Directors (“Board”), staff, and volunteers engaging in advocacy activities on behalf of UWCC.

II. Definition of Advocacy

Advocacy means using UWCC’s platform to advance UWCC goals.

Advocacy encompasses a broad range of activities, including: conducting research, educating the public and policymakers, building relationships across sectors, convening groups to strategize for change, communicating to the media, endorsing issues publicly, or testifying before local, state or federal bodies.

UWCC advocacy activities occur either: (1) as part of a long-term, strategic plan for addressing community priorities; or (2) in response to a more immediate community issues or events.

III. Process

When UWCC considers engaging in an advocacy activity, it shall ask the following questions:

1. Is this a priority issue for UWCC related to Education, Income, Health, or the non-profit sector?
2. Is UWCC’s role needed? Are we adding something unique?
3. Can UWCC have an impact by engaging in the activity?
4. Does the advocacy activity fall within the scope of activities UWCC is allowed to engage in as a non profit?¹

If the answer to any of the four main questions is “no”, then UWCC shall not proceed.

¹ To be determined by answering these questions: If the activity is “lobbying,” as defined by law,
a) Is it within the amount and type of lobbying that 501(c)3 organizations are allowed to engage in under the exempt organizations law?
b) Does it require registration and disclosure to comply with Vermont’s Lobbyist Registration and Disclosure Law? And if so, is UWCC taking the necessary steps to comply with this law (assuming that the activity comports with the balance of this advocacy policy)?

If the answer to all four main questions is “yes,” then UWCC shall proceed as follows:

(A) If the advocacy activity is part of a long-term, strategic plan for addressing community priorities:

UWCC staff, volunteers, and Board shall follow the usual UWCC governance practices and policies for developing, recommending, and approving investments.

(B) If the advocacy activity at issue is in response to an immediate community issue or event:

UWCC staff, volunteers, and Board shall proceed as follows:

(1) UWCC staff shall determine whether a Trigger Issue exists. A Trigger Issue is one in which:

(a) the issue may be perceived as controversial,

or

(b) advocacy activities would newly position UWCC publicly (beyond traditional UWCC messaging).

(2) If no Trigger issue exists, staff may proceed.

(3) If a Trigger Issue is identified, the Executive Committee of the Board shall be notified. The Executive Committee shall determine whether:

(a) Staff may proceed,

or

(b) Full Board approval is needed.

(4) If approval from the full Board is needed, the Executive Committee shall make a report and recommendation to the Board on the issue. In developing its report and recommendation, the Executive Committee shall consult with committees or sub-committees of the Board, as needed.

Nothing in this Section III.B is intended supplant the usual UWCC governance practices and policies for developing, recommending, and approving investments contemplated in Section III.A. Instead, this Section III.B applies only to those advocacy activities that are considered in response to urgent community issues or events.

IV. On-Going Legal Compliance

The UWCC shall obtain legal advice on an annual basis to determine whether there have been any changes to the exempt organizations law and Vermont’s Lobbyist Registration and Disclosure Law and to receive guidance on UWCC’s procedure for ensuring compliance with these laws.