

*This policy is intended for use by non-profits that do not define themselves as “advocacy organizations”. The example draws both inspiration and language from a similar one developed by Jan Masaoka, CEO of the California Association of Nonprofits and published in the online publication **Blue Avocado** in September 2008.*

Public Policy Advocacy

We believe that the realization of our vision and mission are dependent on an effective public policy environment. Public policy has to do with the laws that govern the community and the boundaries or regulations within which public, private and no-profit organizations must operate.

It is not good enough that we serve our clients, constituents and communities. On occasion we must advocate for good public policy where there is none and better public policy where improvements can be made. We will use our organizational voice strategically and thoughtfully.

The following outlines the principles by which we will consider taking public policy stands, and a process to follow when making such a decision.

1. Only the board of directors can decide on an official policy stand by the organization.¹
2. Suggestions for taking a policy stand can come from the board, from staff or from external stakeholders. These suggestions should be sent to the Board of Directors and to the Executive Director/CEO.
3. A proposed public policy position can be considered by the board or may first be referred to an existing committee or ad hoc study group for further examination and planning.²
4. We will consider taking an organizational stand IF all of the conditions below are met:
 - The issue directly or indirectly affects our constituents and/or our organization
 - The issue and the public policy changes that addressed are within our area of expertise and knowledge as an organization
 - The action will not jeopardize our reputation
 - We have reached out to like-minded or sister organizations to assess their interest and support.
 - In making the decision to take a position or stand we will determine whether we are assuming a leadership role in the community on the matter or primarily supporting others to take the leadership role
 - We will develop a realistic plan for how to communicate our stand to the appropriate people and what actions are required to implement the stand. This plan will include an estimate of how much board and staff time might be involved in taking this action

- Our advocacy action will, unless the Board decides otherwise, be carried out in a non-partisan manner as defined by the Charities Directorate of the Canada Revenue Agency (CRA)³

5. Where our actions involve letters to officials, letters to editors, and open letters to the public on our stand they will be signed by the Chair of the Board of Directors and the Executive Director.

6. Where our actions involve press conferences or briefings initiated by us they will be facilitated by the executive director and the board chair or, if he/she is not available, another board officer.

7. Where our actions involve public demonstrations, board members are expected to participate.

8. All of our public policy stands will be posted on our website.

9. Public policy stands expire after one year from adoption unless the board acts to extend the period.

The sample policy may be freely used and modified by non-profit organizations without attribution.

¹ Because some non-profits such as environmental groups regularly take public stands, board authority may hamper timely responses to public issues. Where staff, or the executive director/CEO, has this authority the policy might read: *Where a particular public policy position is outside the organization's usual action, and/or requires board member engagement, the board shall approve the public policy stand.*

² Most non-profits do not have a public policy committee. Creating an ad hoc group to consider the matter, if such a group can do its work quickly, may be a good option. It may be wise to create this group in advance of a board meeting rather than rely on the longer process of the board creating the committee and then have the committee report at a later date.

³ This reference to the Charities Directorate of the Canada Revenue Agency is particular to non-profits that, in Canada, are registered charities.