



## Policy on Issues of Advocacy

As a 501(c)(3) organization, The Community Foundation of Northeast Alabama may advocate on issues of concern to the Foundation, and may devote staff and financial resources up to the limit allowed by law to advocate and lobby on behalf of Board approved issues. The Foundation's identified authorized representative(s) may only advocate on issues that have been reviewed and approved by the Board of Trustees, which shall have sole authority for policy issues and shall have oversight authority for all advocacy activities conducted on behalf of The Community Foundation of Northeast Alabama.

Advocacy issues shall be reviewed based on the following procedures:

- The issue includes a funding priority of the Foundation or one of its donor funds.
- There is significant investment of discretionary dollars and/or staff resources by the Foundation in areas affected by the issue.
- The issue is large in scope (i.e. it affects large numbers of people and could potentially have significant impact on their lives).
- There is significant staff knowledge or ability about the issue and includes donor interest in the issue.
- There is an opportunity for the Foundation to take a pro-active rather than reactive position on the issue.
- The Foundation's voice could help shape the outcome on the issue, policy or legislation for the overall betterment of the community.

A position statement shall be developed that demonstrates clearly the Foundation's views on an issue. Any such advocacy work must fall within clearly defined limits for staff time and budget, and must comply with any legal restrictions on advocacy or lobbying. Individuals authorized to speak and negotiate on behalf of the Foundation for this issue in addition to the Board chairperson and the president/CEO of the Foundation must be clearly identified. No representative, volunteer or staff person shall advocate on issues beyond the scope of the position statement and restrictions without first consulting and receiving approval from the Board of Trustees.

## **Definitions of General Advocacy, Direct Lobbying and Grassroots Lobbying Activities**

General advocacy includes but is not limited to: letters to government agencies; testimony when invited by legislative and regulatory panels; letters to the editor and speeches on issues (without a legislative call to action); and meeting with government agencies.

Direct lobbying includes: lobbying elected officials, such as letter writing and visits; asking to testify before a legislative committee; asking the Foundation's donors to support a particular piece of legislation.

Grassroots lobbying includes: asking members of the public to support a specific piece of legislation, through letters, articles, or speeches.

Advocacy does not include activities by the president & CEO of Foundation to educate elected officials about the Community Foundation of Northeast Alabama specifically or about the broader philanthropic industry.

The Foundation has a legal right to engage in advocacy to the extent it complies with all local, state and federal lobbying reporting requirements.

The Community Foundation, as a 501(c)(3) organization, is nonpartisan and does not advocate for or against any candidate for public office, nor does it allow its staff or resources to be used in that endeavor.