



**STAND  
FOR YOUR  
MISSION**



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**THE POWER OF BOARD ADVOCACY**  
A Discussion Guide For Boards

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# We are called to be advocates

Public policy can play a powerful role in making our society more just. And it can help nonprofit organizations make important advances that create lasting, positive change.

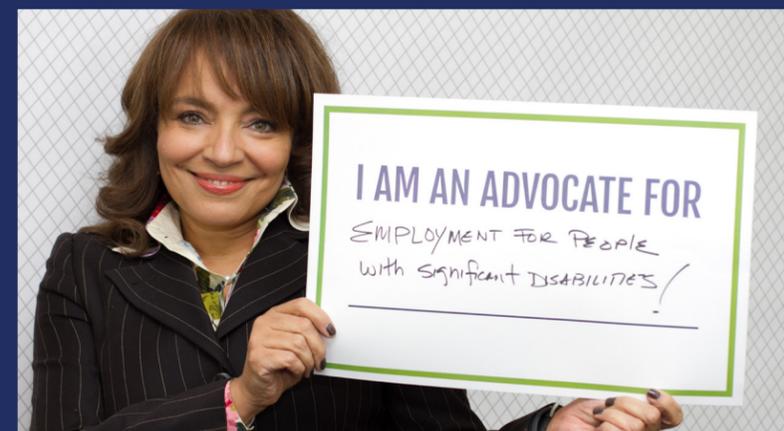
Unfortunately, the opposite can be true as well. Public policy can be destructive, harming the communities and lives we are committed to improving.

When it comes to our missions, the impact of changes in public policy is rarely neutral. And — as leaders of our organizations — that means that we cannot be neutral either.

Is there a way to make sure that our public policies are a source of good? The answer is yes — and board leaders have a key role to play.

## **We must advocate.**

Now this is not about jumping into partisan politics. And it's not about endorsing or opposing political candidates. Nonprofit advocacy is about helping those who set public policy understand how the choices they are contemplating — the decisions they are making — will positively or negatively affect the people we serve. Nonprofit advocacy is about standing for our missions.





# = Board Engagement in Advocacy

Stand for Your Mission seeks to unleash the power of the nonprofit sector to advance the public good through advocacy. We seek to help board leaders — those who are guiding the way that each nonprofit organization upholds its purpose, values, and responsibility to society — provide the kind of leadership that supports, prioritizes, and engages in critical advocacy efforts in advancement of their missions.

Launched in 2014, Stand for Your Mission flows from a deep belief in the role of nonprofit organizations in identifying public policy solutions and finding common ground. It was initiated by a collaborative effort between the Alliance for Justice, BoardSource, the Campion Foundation, the National Council of Nonprofits, and the United Philanthropy Forum, with financial support from the Campion Foundation and the John S. and James L. Knight Foundation.

Since then, Stand for Your Mission has become a rallying cry for engaged, purpose-driven board leadership.

We call upon those board members who are not yet standing for their missions through advocacy to have a discussion about how to get started.



# The Board's Role In Advocacy

The highest performing nonprofit boards understand that public policy affects the work of their organization. They continuously leverage advocacy as a way to stand up for the mission and people they serve.

But what does the board's role in advocacy look like? And how does it relate to the work of staff members in advocacy?

There are three main ways that board members engage in advocacy, all of which should be supported by a fundamental understanding of how the public policy environment is affecting — or could affect — the organization's work and the people and communities it serves.

## THREE CRITICAL BOARD ROLES

### Strategy

Understand how the policy environment could impact the organization's work.

Build strategies that seize public policy opportunities and address public policy threats.

Leverage advocacy as a way to "get things done."

### Budget & Resources

Understand your organization's budget and any public funds that may be vulnerable if public policy shifts.

Prioritize resources to support strategic engagement in advocacy, e.g., coalition membership or staff time.

### Personal Engagement

Leverage your influence and networks in support of the organization's advocacy efforts by making calls, setting up meetings, etc.

Attend meetings with decision makers and law makers with organization staff.

Participate in group advocacy efforts, such as lobby days or congressional hearings.



## WAIT A MINUTE. I THOUGHT NONPROFITS WERE NOT ALLOWED TO ADVOCATE?

It is not uncommon for board members and other nonprofit leaders to misunderstand the law as it relates to nonprofit engagement in advocacy.

The truth is, as a 501(c)(3) nonprofit organization, you have a legal right to advocate. And — when your mission and the people you serve are depending on you — you have a responsibility to do so.

But not all advocacy is the same, and there are some important things to know and understand:

- ▶ **Legislative Lobbying**  
501(c)(3) public charities are allowed to work for or against a specific piece of legislation, up to a generous limit. Learn more at [www.bolderadvocacy.org](http://www.bolderadvocacy.org).
- ▶ **Elections & Electioneering**  
Nonprofit organizations may engage in nonpartisan voter registration, education, and turnout activities. Under current law, 501(c)(3) organizations are not allowed to endorse or oppose candidates, but this is being debated by Congress. BoardSource supports this restriction on electoral politics, and has advocated against the repeal of the Johnson Amendment, which established this restriction in 1954. To learn more about current efforts to repeal the Johnson Amendment, visit the National Council of Nonprofits website.
- ▶ **Educate & Inform**  
All other efforts to educate and inform decision makers and policy makers, as well as the public, are permissible for all nonprofit organizations; there are no restrictions on the amount of these activities that can be done.



# Board Advocacy in Action

## Treehouse's Story

In 1988, a group of Washington State Department of Social and Health Services social workers grew tired of seeing the deprivation often faced by children in foster care. They started purchasing the little things needed to help foster children feel loved and capable — things like birthday presents and school supplies — funded by community bake sales and car washes.



Over time, Treehouse grew to become a strong and thriving nonprofit providing valuable programs — all with the goal of supporting successful completion of high school for students in foster care.

But in 2012, the organization faced the harsh reality that — despite its efforts — fewer than 50 percent of youth in foster care were graduating from high school.

## Defining the Challenge & Need

In analyzing the situation and strategizing about what it would take to realize change, the leaders at Treehouse — including board members — quickly identified systemic challenges that were creating barriers, both to students in foster care and in terms of access to Treehouse's programs. They quickly understood that if there wasn't coordination, shared data, and maximization of the role and benefit of state child welfare and school services, Treehouse could work smart, long, and hard but still fail to fulfill the strategic goal of educational equity for youth.

There was no question: It would take changes in public policy to solve the systemic challenges that were resulting in low graduation rates for students in foster care. And that meant that Treehouse needed to build an advocacy strategy.

## Organizing For Advocacy – Strategy & Resources

According to Treehouse's chief policy and strategy officer, Dawn Rains, "When we first waded into advocacy, [our CEO] led the way, identifying barriers and needs that could be addressed through legislation, as well as advocating with state agency leaders for practice change or providing needed input on administrative rules. She represented our organization at child welfare coalition meetings at which we would adopt a shared legislative agenda each year; she also went to our state capitol to testify on legislation and advocate with legislators.

"If we had a law we wanted passed, [our CEO] would reach out to the board and a handful of key supporters and ask them to call or email their elected officials," says Rains. "As we experienced small wins, we began to realize that they were the tip of the iceberg, and that Treehouse had the potential to be a critical statewide voice for youth in foster care."

It was that realization that prompted the Treehouse board to formalize its engagement in advocacy as a core organizational strategy. This included the formation of a policy and advocacy committee to lead the board in setting and achieving Treehouse's advocacy goals.

## Leveraging the Board – Individual Board Member Engagement

Treehouse's board committee on policy and advocacy plays a key role in supporting all members of the board in their advocacy role, keeping them informed about their legislative advocacy activities and teaching them how

*"We realized that the organization could not improve youth outcomes through direct services alone."*

DAWN RAINS  
CHIEF POLICY & STRATEGY OFFICER, TREEHOUSE

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to advocate in person and via phone, email, and social media. The committee — in partnership with staff — provides board members with talking points, background information, and opportunities to practice their 'pitch' in board meetings, as well as with template emails, Facebook posts, and tweets they can customize and send directly to their elected officials.

Says Rains, "There are so many ways for board members to participate in advocating for your mission. For us, our staff and board have organized trips to the state capitol during the legislative session for board members to meet with lawmakers. Board members also participate in an annual Youth Advocacy Day, led by our partners at The Mockingbird Society, in which they accompany youth to advocate on issues the youth themselves have identified to improve the foster care system." Advocacy has become such a central part of the Treehouse board's work that all board members now set an annual goal related to their engagement in advocacy, right alongside their personal fundraising goals.

*"When we started our work in advocacy, I don't think we knew what was possible. We are so proud that Washington now has some of the most comprehensive laws supporting the educational success for children and youth in foster care, thanks in great part to Treehouse's leadership — and our board members that have played a key role."*

DAWN RAINS  
CHIEF POLICY & STRATEGY OFFICER, TREEHOUSE

### The Result – A Policy Framework that Supports Youth in Foster Care

Treehouse can point to a number of advocacy wins that have significantly improved systems supporting youth in foster care:

- ▶ Minimized enrollment times, as well as simplified credit transfers, when students in foster care change schools.
- ▶ Improved communication and data-sharing between education and child welfare systems.
- ▶ Ensured automatic eligibility for youth in foster care for the College Bound scholarship.
- ▶ Improved school discipline policies that disproportionately impacted youth in foster care.
- ▶ Increased funding for Treehouse's educational support services for children and youth in foster care to more than \$2.8 million annually.

Beyond all of these wins, Treehouse was also heavily involved in advocating for the passage of HB 1999, which established the state legislature's intent to make Washington first in the nation for high school graduation, college enrollment, and college graduation. The bill aligned educational support services contracts with the state education agencies rather than the child welfare agency, and has laid the groundwork for significant expansion of education programs for foster youth statewide.

# Advocacy Engagement: The Nonprofit Board's Role

## Four Ways to Engage in Advocacy & Success Stories

Stand for Your Mission has identified four different ways to engage in advocacy. You may lean more heavily on one or more of these ways than others, depending on the issue facing your organization, your strategy for change, and your organization's preferred role.



## 1

### INFORM & ACTIVATE YOUR NETWORK

Help inform and activate your organization's network in support of important policy issues.

#### When this approach is most helpful

Any time there are public policy decisions that could positively (or negatively) affect your organization and the people and communities you serve. Even if your organization does not have its own policy expert, you can activate your network by tapping into insights and strategy from coalitions or other organizations with similar missions or priorities.

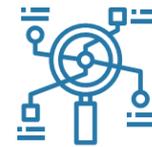
#### The board's unique value

- ▶ Helping to elevate the visibility of these efforts by leveraging board members' personal influence and networks.
- ▶ Serving as a unified organizational voice, particularly on issues that may be perceived as more controversial.



#### How this type of engagement in advocacy helped highlight and celebrate a successful program

The National Older Worker Career Center (NOWCC) had a successful model for engaging experienced workers in work within a federal agency, but was eager to scale the model through partnership with other agencies. NOWCC launched an effort to highlight and celebrate the value of the experienced work program, which resulted in a legislative win to authorize a program beyond the first agency.



## 2

### RESEARCH IMPACT OF POLICY ISSUES

Analyzing how specific policy issues impact (or would impact) the community you serve.

#### When this approach is most helpful

When a set of issues needs to be better understood or documented in a way that creates a compelling case for public policy change.

#### The board's unique value

- ▶ Supporting the investment in research during budgeting and planning.
- ▶ Helping to identify and connect with donors or funders that may be able to underwrite research.



#### How advocacy helped document a need for stronger civic education.

Illinois had the weakest civic education requirements in the country, which was creating what the Citizen Advocacy Center (CAC) considered to be a civic health crisis. CAC collaborated to author the "2010 Illinois Civic Health Index," which became a fundamental building block to educate the public and elected officials of the dire need to bring civics back to Illinois's public schools. Efforts were successful, and civic education in Illinois public schools has been transformed as a result.

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# Advocacy Engagement: The Nonprofit Board's Role



## 3

### EDUCATE POLICYMAKERS & THE PUBLIC

Educating policymakers (and/or the general public and media) about how an issue or piece of legislation is impacting or would impact the people and communities you serve.

#### When this approach is most helpful

When there is a clear case for a public policy change, but decision makers are not necessarily well informed about the issues or impact on the community.

#### The board's unique value

- ▶ Leveraging personal networks and influence to reach decision makers (for meetings, conversations, etc.).
- ▶ Serving as an influential "community voice" in conversations with decision makers.



#### How advocacy reversed a decision that would have hurt youth living in shelters.

New state guidelines would have made the Anacortes Family Center (AFC) ineligible for state funding, based on broad application of a philosophy that requires organizations to keep their programs open to all. But as an organization serving children who have experienced trauma, AFC felt strongly that it needed to bar participation from individuals with convictions for crimes against children, sex crimes, or violent felonies.

AFC worked to educate state officials on the impact of this policy change, which resulted in the state removing the restriction. AFC continues to receive state funding for its successful program, and policymakers now understand more about AFC's mission and the people served.



## 4

### JOIN FORCES TO CREATE A LOUDER VOICE

Bringing community leaders together to jointly identify community needs and challenges and build shared priorities for public policy change.

#### When this approach is most helpful

When broad buy-in is necessary or helpful in establishing priorities and a shared strategy. More voices equals more power.

#### The board's unique value

- ▶ Connecting with community leaders and organizations with diverse spheres of influence.
- ▶ Overcoming the challenging power dynamics or "turf" issues that may exist between organizations.



#### How advocacy enabled diverse stakeholders to solve problems together.

LA County was in need of a robust public transportation system, the issue that Move LA was formed to tackle. Move LA understood that its mission would require widespread support and engagement and worked to create a policy table big enough to fit the broad diversity of voices in LA County in the discussion. This coalition's efforts helped pass legislation that will build the world's most modern transportation system and do so in a way that serves the diverse needs of stakeholders across the region.

# The Conversation You Should be Having in Your Boardroom

Nonprofit organizations have their own unique histories, cultures, and missions, and, therefore, their own orientations to advocacy. But no matter where you are in terms of organizational advocacy — engaging a lot or not yet doing anything — the path toward greater impact through advocacy begins with an honest conversation in the boardroom about your organization's mission, goals, and, most important, its vision for the future.

This guide is designed to help you start an important conversation about advocacy. While some organizations may be able to move ahead quickly because they have already grappled with the more fundamental questions presented here, others may want to spend more time on these questions before moving forward. Regardless of where your organization starts, we encourage you to use this guide as a tool for facilitating ongoing board dialogue about how your organization will "stand for your mission" by engaging in advocacy on behalf of your mission and the people and communities you serve.

## STEP 1 DEFINE A SHARED VISION FOR THE FUTURE



Your organization was founded to meet a specific need or purpose and, as a part of that, is likely to have a vision of what the world would look like if that mission was achieved. Ask your board to answer the following questions:

- 1 Is the board in agreement about our organization's vision for the future?
- 2 How would the world be different if our mission was fully achieved?
- 3 Are our current strategies the fastest or most direct path to achieving our vision? If not, what would be?

## STEP 2 UNDERSTAND THE ECOSYSTEM IN WHICH YOU OPERATE



All organizations are impacted by the larger environment and ecosystem in which they operate. Understanding what that ecosystem looks like for your organization and where you are situated within it are critical steps for your board. Ask your board the following questions:

- 1 What are the societal realities or problems that our work seeks to solve, alleviate, or otherwise address?
- 2 What are the broader issues associated with our core work?
- 3 Are our strategies actively addressing those issues? If not, what would change if they did?

## STEP 3 IDENTIFY THE OPPORTUNITIES & THREATS AFFECTING YOUR ORGANIZATION



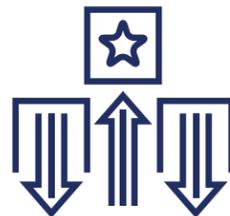
Changes in your community, funding sources, and public policy environment affect — either positively or negatively — your organization's ability to achieve its mission. Identifying and understanding the opportunities and threats affecting your organization is a key step in building an advocacy strategy and in ensuring that your board is well positioned to help implement that strategy. Ask your board the following questions:

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- ▶ What are some of the external factors that have positively or negatively impacted our work in the past? How well did we — as a board — anticipate them before they happened? Did we try to stop or soften the bad ones, or rally to support the good ones? If we didn't, what might have been different if we had?
- ▶ Are there public policy changes that would dramatically improve (or threaten) our ability to fulfill our mission and vision? If we could advance our mission more effectively by changing one law, public policy, or public attitude, what would that change be?
- ▶ If we partner with the government to deliver our programs and services through government contracts or grants, how well do we understand how changes in public policy could impact this funding?
- ▶ How are the people we serve impacted by public policy? Are there barriers to their success that changes in public policy could help alleviate? Are there threats to their well-being that are being contemplated by decision makers?
- ▶ Are we — as an organization — actively engaged in conversations with decision makers about the policies or decisions that affect our work? If not, why not?

### STEP 4

#### PRIORITIZE ADVOCACY AS A STRATEGY



The board is responsible for setting the organization's strategy in partnership with staff. Therefore, the board plays a critical role in determining the role advocacy can and should play in its overall strategy and how best to resource those efforts. If your board doesn't understand how public policy impacts your organization, then the board is setting the organization's strategy without seeing the complete picture, and may make decisions that fail to account for the realities facing your organization, your community, or the people you serve. Ask your board the following questions:

- ▶ Do we regularly consider the public policy environment when we discuss our organization's strategy?
- ▶ Have we allocated the resources necessary to stay informed about the policy environment, whether through our own efforts, through participation in an advocacy coalition, or both?
- ▶ Are we clear on the priorities for our advocacy efforts, and are they aligned with what would make the biggest difference for the people and communities we serve?

- ▶ Do we have goals for our advocacy work that enable us to assess how well we are doing across all the links and connections that are vital to our success?
- ▶ Do we have the organizational resources necessary to engage in efforts to amplify, educate, research, or build coalitions when our mission calls us to do so?

### STEP 5

#### LEVERAGE THE BOARD'S UNIQUE VALUE AS A PART OF YOUR ADVOCACY STRATEGY



Every board member brings a potent combination of passion and influence to their board service that — if leveraged — can powerfully accelerate your organization's advocacy strategy. And being an active ambassador and advocate for your mission is a part of each board member's fundamental roles and responsibilities. Ask your board the following questions:

- ▶ Is serving as an ambassador and advocate an expectation for each board member? Have we written this into our board job description or commitment?
- ▶ Have we provided training or guidance to board members about how to engage effectively in advocacy efforts that enable them to represent our mission and work with confidence?
- ▶ Do we understand our board members' networks of influence well enough to strategically leverage them as a part of our advocacy efforts?
- ▶ Do we have board leaders who can speak to and connect with a broad cross-section of community needs and constituencies in support of our work?
- ▶ Is our board recruitment strategy aligned with our public policy strategy, and the connections or influence that will advance those efforts?

# Stand For Your Mission: Actions For Leaders

## IF YOU'RE A NONPROFIT BOARD MEMBER...

1. Talk with your board chair or CEO about how your board can get more engaged in advocating for your organization's mission. Suggest using this discussion guide as a starting point for that conversation.
2. Ask questions about how the public policy environment could impact your organization and the people you serve as a part of conversations about organizational and programmatic strategy.
3. Seek to understand the organization's business model and how it would be impacted if there were major shifts in federal, state, or local funding as a result of public policy changes.
4. Be willing to tap your networks of influence when doing so. It could support your organization's advocacy efforts.

## IF YOU'RE A NONPROFIT CEO...

1. Educate yourself about the public policy environment in which your organization operates.
2. Use this discussion guide to start a conversation about advocacy in your boardroom.
3. Embed conversations about the public policy environment (including public/government support you may receive) into your board-level conversations about strategy, funding, and organizational impact.
4. Tap into your board members' networks of influence as a part of your efforts to educate and inform decision makers.

## IF YOU'RE A FUNDER...

1. Eliminate restrictions in your grant agreements that may prohibit or discourage grantees from engaging in advocacy.
2. Invest in organizations that are building their advocacy capacity or are already successfully leveraging advocacy as an organizational strategy.
3. Visit [STANDFORYOURMISSION.ORG](https://standforyourmission.org) to download a [Discussion Guide for Foundation Boards](#) to help support a conversation within your foundation's boardroom.

More resources and tools for engaging in advocacy at [STANDFORYOURMISSION.ORG](https://standforyourmission.org)

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