## Advocacy and Lobbying Policy Template

**Effective Date**: [Insert Date]  
**Revision Date**: [Insert Date]  
**Approved By**: [Insert Approving Body]

**1. Purpose**

To define the parameters for advocacy and lobbying activities undertaken by [ORGANIZATION NAME], ensuring compliance with legal requirements, maintaining transparency, and aligning efforts with the organization’s mission and values.

**2. Scope**

This policy applies to all employees, board members, volunteers, and representatives involved in advocacy or lobbying activities on behalf of the organization.

**3. Definitions**

1. **Advocacy**: Activities aimed at influencing public opinion or raising awareness about issues aligned with the organization’s mission.
2. **Lobbying**: Activities specifically intended to influence legislation, which may include direct communication with lawmakers or encouraging others to take action.
3. **Grassroots Lobbying**: Engaging the general public to influence legislation by expressing a specific position on proposed or existing laws.
4. **Direct Lobbying**: Direct interaction with legislators or government officials to influence specific legislation.

**4. Compliance Requirements**

1. All lobbying activities must adhere to applicable federal, state, and local laws, including IRS regulations for 501(c)(3) organizations, which limit the percentage of budgeted expenditures that can be spent on lobbying.
2. The organization must track and report all lobbying expenditures accurately to ensure compliance with IRS Form 990 reporting requirements.
3. Employees, board members, and volunteers must not engage in lobbying activities without prior approval from [INSERT POSITION, E.G., Executive Director].

**5. Roles and Responsibilities**

1. **Board of Directors**: Approves the overall advocacy and lobbying strategy and ensures compliance with legal requirements.
2. **Executive Director**: Oversees the implementation of approved advocacy campaigns and lobbying efforts.
3. **Advocacy Coordinator**: Manages day-to-day advocacy efforts and tracks lobbying activities and expenditures.
4. **Employees and Volunteers**: Participate in advocacy efforts in alignment with this policy and approved initiatives.

**6. Advocacy Guidelines**

1. Advocacy efforts must align with the organization’s mission and values.
2. Advocacy campaigns require prior approval from the Executive Director or designated advocacy coordinator.
3. Materials used in advocacy campaigns must be reviewed to ensure they are accurate, nonpartisan, and consistent with the organization’s messaging.

**7. Lobbying Guidelines**

1. **Pre-Approval**:
   * All lobbying activities require written approval from the Executive Director or the Board of Directors.
2. **Budgeting**:
   * Lobbying expenses must not exceed [INSERT PERCENTAGE, E.G., 5%] of the organization’s annual budget.
3. **Documentation**:
   * Maintain records of all lobbying activities, including dates, participants, and topics discussed.
   * Track lobbying expenditures separately from other operational costs.
4. **Prohibited Activities**:
   * Endorsing or opposing political candidates.
   * Using organizational funds for partisan political activities.

**8. Grassroots Lobbying**

1. Grassroots lobbying efforts must be nonpartisan and focused on raising public awareness of legislative issues related to the organization’s mission.
2. Calls to action must avoid language that could be interpreted as endorsing specific candidates or political parties.

**9. Training and Awareness**

1. All staff and volunteers involved in advocacy and lobbying must complete annual training to ensure understanding of legal compliance and organizational priorities.
2. New hires must complete training within their first [INSERT TIMEFRAME, E.G., 30 DAYS] of employment.

**10. Monitoring and Reporting**

1. **Tracking**:
   * Advocacy and lobbying activities must be logged and reviewed monthly by the Advocacy Coordinator.
2. **Reporting**:
   * Submit annual lobbying reports to the Board of Directors.
   * File IRS Form 990 Schedule C as required for lobbying expenditures.
3. **Audits**:
   * Conduct annual audits of advocacy and lobbying records to ensure accuracy and compliance.

**11. Policy Review and Updates**

1. This policy will be reviewed annually by [INSERT POSITION, E.G., Advocacy Coordinator] and updated as necessary to remain in compliance with changes in laws or regulations.
2. Revisions must be approved by the Board of Directors.

**12. Approval and Adoption**

This policy was approved by the Board of Directors on [Insert Date].

Approved by: [Insert Name or Position]  
Date: [Insert Date]  
Review Date: [Insert Date]  
Next Review Date: [Insert Date]