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Guiding Advocacy Decisions:

A Framework for Nonprofit Boards and Executives in a Dynamic Policy Environment



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Table of Contents

Why Advocacy Now? 5

Purpose of this Guide 5

What Advocacy Means 5

How to Use This Guide 7

Factors for Boards and Senior Leadership to Consider 8

- Identifying Mission-Critical Policy Priorities
- Aligning on Assessment of the Political and Legal Environment
- Assessing Risk and Reward
- Exploring Organizational Structure and Governance
- Understanding Legal Parameters

From Conversation to Action 13

Appendix: Organizational Self-Assessment 18

Why Advocacy Now?

Advocacy has long been a tool for advancing mission. Today, it is a leadership imperative. Nonprofit boards and senior leaders are operating in an environment defined by rapid policy change, heightened public scrutiny, and growing community needs. Decisions made by policymakers increasingly shape whether organizations can fulfill their missions and deliver on their commitments. As a result, issues once viewed as peripheral have become central to organizational success, and boards are being called to provide clearer direction, stronger oversight, and more active partnership with executive leadership. Advocacy is no longer simply one tool among many — understanding whether, when, and how advocacy is necessary is an essential responsibility for leadership. Done well, it enables organizations to advance their mission, influence the systems that affect their work, navigate turbulence, and better serve the communities that depend on them.

While the need for 501(c)(3) organizations to strengthen their advocacy efforts continues to grow, the landscape in which advocacy takes place has become more complicated. Nonprofits may now face new concerns about reputational, funding, and security risks connected to their advocacy efforts. These considerations require senior leaders and board members to align on mission priorities, advocacy strategy, and safeguards that protect organizational integrity and safety.

Purpose of This Guide

The Panel on Advocacy was created to provide practical guidance for leaders of the charitable nonprofit sector — nonprofits and philanthropies — to consider how, or when, advocacy could further their organization's mission. Its goal is to equip organizations with the confidence and tools needed to advocate effectively by posing critical questions related to the organization's advocacy philosophy, advocacy decision-making authority, policy priorities, and more. The panel believes that clear alignment between boards and senior leaders on the questions that follow is fundamental to building that confidence.

Effective advocacy begins with a shared understanding of the organization's purpose and mission, and what it takes to advance them. Advocacy should be viewed not as a departure from core work but as a natural extension of it. Grounding advocacy discussions in purpose and mission helps organizations stay focused on their purpose, resist external pressures to act outside of their mission, and make sound strategic decisions about when, where, and how to engage.

What Advocacy Means

Many boards are operating without a shared understanding of what advocacy is, what it looks like in practice, and what role they should play in it. For the purposes of this panel's work and this guide, we have defined advocacy as *intentional efforts to influence decisions made by legislators, executive branch officials, courts, or the public*. It covers a wide range of activities: public education, commenting on rulemakings and proposed regulations, litigation, lobbying within permitted constraints, coalition-building, and nonpartisan voter engagement. While all lobbying is advocacy, most advocacy does not meet the technical definition of lobbying. Rather, it should be viewed as a core strategy for achieving mission-driven impact and one way in which organizations act on purpose beyond programs and services.

- **The IRS defines lobbying as attempting to influence legislation by contacting, or urging the public to contact, members or employees of a legislative body for the purpose of proposing, supporting, or opposing legislation, or for advocating for the adoption or rejection of legislation.**

Just as there is a continuum for how to engage, there is also a continuum for how much or how deeply to engage. Some organizations hire full-time staff and consider themselves "advocacy" organizations; other organizations sign on to letters occasionally or send their annual reports to policymakers yearly. There is no right approach — just because you cannot do everything does not mean you should not do anything.



Building relationships with policymakers



Sharing research, data and community stories with policymakers



Publishing research, reports or policy briefs



Raising public awareness



Engaging in nonpartisan voter education



Participating in a coalition



Organizing community forums or educational events



Mobilizing community members to engage on an issue



Engaging in administrative or regulatory processes



Litigation or lobbying for or against specific legislation

Each level of advocacy presents different opportunities and considerations. Local advocacy may offer more immediate access to decision-makers and more direct impact on community, while state and federal advocacy can shape broader systems and influence national narratives around the charitable sector. State- and local-level advocacy may also involve restrictions and compliance requirements that differ from those governing federal advocacy. Boards should consider where their organization is best positioned to engage, taking into account their purpose, mission, relationships, and expertise, as well as how they will define advocacy success.

A critical question for senior leaders and boards is not only whether and how to step into advocacy but also what is at stake if they do not. Boards should consider what opportunities for impact may be lost, what systemic barriers may remain unaddressed, what message inaction may send to staff, donors, and community members, and how their absence from policy conversations may affect their community and mission.

At the same time, engaging in advocacy can carry its own set of risks. This guide is designed to help nonprofit leaders and boards understand and mitigate those risks and, if they choose, engage in advocacy with greater clarity, confidence, and strategic focus, whether they are new to advocacy or refining an existing approach. By organizing key considerations into a practical framework, this guide supports more strategic conversations between boards and senior leaders, helps align expectations, and creates space to navigate risks, opportunities, and differing perspectives. Ultimately, this guide is intended to help boards and organizational leadership move from reactive decision-making toward a more intentional, purpose-driven approach over time.

How to Use This Guide

This guide is not a checklist or a one-size-fits-all solution. Nonprofit organizations operate in different contexts — with varying missions, capacities, and risk considerations — and effective advocacy requires judgment, adaptability, and alignment with organizational values. Organizations should consider their stage of development when determining how advocacy fits into their work, recognizing that newer and more established organizations have different capacities, priorities, and opportunities to engage. The questions that follow are intended to help boards and senior leaders engage in thoughtful dialogue, consider key factors, and make informed decisions grounded in their unique mission and circumstances. You do not need to consider every factor identified in this guide before taking action. This framework helps leaders make thoughtful decisions about when and how to engage.

This guide calls on boards and leaders to make decisions in ways that place the organization's purpose and community impact at the center. This means recognizing that advocacy is both a mission strategy and a governance responsibility. Boards and senior leaders are not solely responsible for protecting the organization from risk; they are also responsible for helping the organization use its voice, influence, relationships, and resources in service of its purpose. While legal, financial, reputational, or security concerns cannot be ignored, those concerns should be considered in the broader context of mission, community impact, and responsible governance. This approach is consistent with the broader *Principles for Good Governance and Ethical Practice* and complements other governance resources, such as *Purpose-Driven Board Leadership*.

Advocacy is not only a response to immediate challenges but also a critical strategy for achieving long-term impact. In the current environment, many nonprofits are facing pressure to respond quickly to immediate policy threats, funding uncertainties, and rapidly changing community needs. Effective advocacy requires balancing urgency of the moment with a broader strategic vision. Using this framework, boards and senior leaders can develop a strategy to not only address immediate advocacy opportunities but also develop or clarify the organization's overall philosophy and approach to advocacy. These two uses are related but may require different questions, tools, and levels of discussion. Before using the guide, boards and senior leaders should identify the purpose of the conversation and select the sections most relevant to that purpose. For smaller organizations, consider selecting two to three questions per section to consider first.

> ***Advocacy is not only a response to immediate challenges, but it is also a critical strategy for achieving long-term impact.***

Before diving into the substantive sections of this guide, consider taking a step back with staff to assess the role advocacy plays — or could play — in advancing your organization's mission. While advocacy serves as a critical strategy for many nonprofits, how and whether it is prioritized varies based on an organization's strategic goals, expertise and capacity, funding model, policy environment, who else is advocating on the issue, and community relationships. Understanding where your organization sits can help create the context needed for productive discussions between boards and senior leaders. Refer to our staff-focused advocacy assessment in the appendix to help identify your organization's current approach to advocacy and inform conversations about future priorities and capacity.

This guide is for educational purposes only; it is not legal advice.

Factors for Boards and Senior Leadership to Consider

Identifying Mission-Critical Policy Priorities

Senior leaders — with board engagement to follow — should determine which advocacy priorities most directly advance the organization's purpose, mission, and long-term strategic goals.

Internal questions:

- How do we define mission success as an organization?
- What advocacy tools and strategies are we currently using? How does advocacy contribute to achieving our mission and strategic goals, and how can we measure impact on both organizational outcomes and the people we serve?
- What are our criteria for whether, when, and how to engage in advocacy, and how do those criteria align with our values and mission? How will we prioritize advocacy across the short, medium, and long term, define the appropriate scope (i.e., geographical and governmental levels), and assess the resources required for success?
- How does the current policy landscape affect our ability to achieve our mission, and where are we uniquely positioned to influence policy through our expertise, lived experience, research, or community voice?

External questions:

- How might our advocacy benefit the people and communities we serve?
- What policy priorities are most meaningful to the people and communities we serve? How are we incorporating their voices into crafting our policy priorities? What evidence do we have to substantiate our belief that this is a priority for those we serve?
- What is the landscape of advocacy by other organizations with similar missions? How could our organization contribute or collaborate on these efforts by adding our unique voice to fill a gap?
- What are the consequences for the people and communities we serve if we choose not to engage in advocacy?
- What values do our policy priorities demonstrate to the community?

Aligning on Assessment of the Political and Legal Environment

Board members and senior leaders may have differing interpretations of the political and legal climate, stakeholder dynamics, and the risks associated with nonpartisan advocacy. An understanding between the board and senior leadership of the opportunities for — and risks to — mission achievement posed by the political environment can support informed, strategic decision-making.

- What is our current understanding of the political, cultural, legal, and economic environment and the risks and opportunities it creates for mission achievement?
- What activities are we engaging in now? Do we need to alter our advocacy strategy to better address this political environment? To what extent are we shifting our public posture to meet the political moment?
- To what extent do short-term adaptations — such as changes to advocacy strategies, public positioning, partnerships, or resource allocation made in response to the current political environment — influence progress toward mid- to long-term mission objectives and goals?
- Is there sufficient information and data available to make an informed recommendation or decision on our advocacy strategy?
- How do we ensure that assessing political or legal risk does not lead us to prioritize organizational comfort or caution over our mission, equity, and the needs of affected communities?
- What additional information, legal advice, or resources would help inform our deliberations and advocacy strategy?
- What opportunities exist in the current environment that may not be available in the future?
- What assumptions are we making about risk, and what evidence supports those assumptions?
- Given the current political environment, which advocacy approaches are most likely to advance our policy goals, and what criteria should guide our choice among them? (e.g., litigation, legislative advocacy, and executive branch advocacy.)

Assessing Risk and Reward

ORGANIZATIONAL INFRASTRUCTURE AND READINESS

Boards and senior leaders should assess whether the organization is equipped to sustain advocacy efforts and respond to potential backlash or retaliation. This assessment should include internal capacity, decision-making processes, external resources, partnerships, and crisis preparedness.

- Do we have adequate resources and capacity to achieve our advocacy goals?
- Do we have the necessary training and policies in place to ensure staff are informed of relevant advocacy rules and reporting requirements?
- Do we have an understanding and process for selecting where we will take risks and where we might choose to modify our strategies?
- Who else is engaged in advocacy around this issue? Are we the right organization to lead in this space, or are we best served by supporting a better-positioned organization or joining a coalition?
- Are we prepared to use organizational voice and power responsibly, including by coordinating with partners and avoiding actions that could unintentionally crowd out community-led advocacy?
- Have we identified trusted legal, communications, and policy advisors we can call upon if needed? Have we asked these advisors what steps we can take up front to mitigate risks and better capitalize on opportunities?

- Are we prepared to communicate both internally and externally about our advocacy decisions?
- How strong is our organization's risk management infrastructure? How prepared are we to respond if we face criticism, legal challenges, or politically motivated attacks?

FUNDING CONSIDERATIONS

Boards and senior leaders should consider how advocacy activities may positively or negatively influence funding and other strategic relationships, including with foundations, government agencies, and corporate and individual donors.

For Charitable Organizations:

- What is our current funding situation and how does it affect our capacity to invest in advocacy activities?
- How might we engage donors as part of our advocacy efforts?
- How can advocacy help us attract new donors? How can we communicate the connection between our advocacy activities and our mission?
- What funding opportunities are available to support advocacy initiatives?
- What is our understanding of the rules and constraints that apply to different types of funders?
- Should funding support for coalition activities be considered? Is that optimal or sub-optimal?
- How might our advocacy positions affect our funding base, what level of funding-related risk are we willing to accept, and what evidence do we have about likely donor support or backlash?
- What policies and technologies do we have in place to protect donors who wish to remain anonymous? When might donor disclosure be required by law?

For Philanthropic Organizations:

- Are there restrictions on any of our grants, implicit or explicit? Could these restrictions be amended to give grantees more flexibility to engage in advocacy?
- How might our funding practices unintentionally discourage grantees from engaging in lawful advocacy?
- How can we use our institutional power, position, and resources to strengthen the advocacy ecosystem, absorb risk, create space, or provide cover or resources for community-based organizations?
- How do we navigate funder–grantee power dynamics in ways that support grantee-led advocacy and community-defined priorities rather than funder-driven agendas?

OTHER STAKEHOLDER CONSIDERATIONS

Boards and senior leaders should consider how advocacy activities may positively or negatively influence strategic relationships and the broader ecosystem in which the organization operates, including community partners and coalitions, members, media, and corporate partners.

- What opportunities exist to shape policy in ways that remove barriers and improve outcomes for the communities we serve?
- What roles do our stakeholders and partners expect us to play — or not play — in advocacy, and are those expectations aligned with our mission, values, and assessment of where we can have the greatest impact?
- How should we weigh differing stakeholder expectations when they favor addressing immediate needs, and what principles should guide decisions about resource use, reserves, and long-term organizational sustainability?

- Is there an opportunity to fill a gap by taking on an advocacy role relevant to our mission?
- How are we ensuring that people most directly affected by a policy issue are meaningfully shaping and driving our advocacy approach, rather than relying primarily on staff perspectives?
- What is the cost to our community if our organization chooses not to engage in advocacy? What resources, protections, or opportunities might be lost?

REPUTATIONAL RISKS

Boards and senior leaders should consider the potential reputational impacts of engaging — or not engaging — on specific issues, including whose reputation, safety, credibility, and power are affected by the organization's choices. Advocacy can shape how an organization is perceived by community members, funders, policymakers, staff, and the general public.

- Whose risks and opportunities are we centering as we consider advocacy on particular issues? Our organization's? Our grantees' or communities'? How do those differ and align? What should we prioritize as we decide?
- How does our organization assess the upstream or downstream impacts of our activities on communities and key stakeholders we serve?
- Is our organization in a position of power or privilege that may mitigate any potential harm? Does the value to our mission outweigh the organizational risks?
- How would our engagement contribute to our ecosystem's collective purpose?
- What reputational risks arise from failing to act on issues closely tied to our mission?
- What strategies can we use to mitigate potential risks, including partnerships and joint advocacy efforts?
- How does our approach to advocacy affect long-term relationships with policymakers, funders, or community? Does our approach encourage constructive dialogue across political perspectives?
- Is the advocacy activity aligning with our mission and, if not, do we risk mission drift and ostracizing part of our community by engaging?

ORGANIZATIONAL SECURITY

Boards and senior leaders should consider how the organization will support and protect staff who may be impacted or put at risk by the organization's advocacy efforts.

- What have senior leaders and staff identified as key risks to engaging in organizational advocacy and to which entities or populations? What are the plans for mitigating those risks, and have they been implemented?
- Will staff's activities in their personal capacities affect their organizational role? Do we have a clear policy regarding advocacy conducted in personal and organizational capacities?
- Will advocacy activities affect our insurance coverage?
- What protocols exist for responding to harassment, threats, doxxing, or targeted attacks both online and offline?
- What steps should be taken to protect the identities and location of our staff and volunteers, if needed?
- Do we have adequate cybersecurity, and are we prepared to respond to cyberattacks?
- What training have we conducted and support have we provided for those engaging in grassroots organizing advocacy? Have we prepared all volunteers and staff for the risks that may arise from such activities?

Exploring Organizational Structure and Governance

Boards and senior leaders should consider how the organization's structure — including board composition, governance model, and decision-making processes — impact its capacity to engage in advocacy.

- Does the board and senior leadership have a shared understanding of the organization's advocacy goals and strategy?
- Does our board include, seek, or meaningfully engage the perspectives needed to understand how advocacy decisions will affect the people and communities most connected to our purpose? Does senior leadership regularly update the board on advocacy aims, activities, and impact?
- Which strategic advocacy decisions are for senior leaders, and which require board approval? Do we have policies in place to make the roles and decision-making processes clear?
- Are governance processes helping or hindering timely advocacy responses? How can we ensure our processes are appropriate for high stakes and urgent advocacy responses?
- Are board members and senior leaders currently engaged in external activities, affiliations, or efforts that could influence, support, or create conflicts with the organization's advocacy strategy?
- Are our governance processes clear about who has authority to speak, decide, and act on behalf of the organization?

Understanding Legal Parameters

Boards and senior leaders should understand the legal parameters of advocacy and lobbying and ensure the organization has appropriate guardrails and guidance in place.

- Does the board and organizational leadership have a clear understanding of the legal limits and reporting requirements that apply to its advocacy?
- What steps do we need to take to ensure our organization provides proper training to staff involved in supporting or conducting advocacy on behalf of the organization, particularly as it relates to lobbying and election laws in addition to applicable local, state, and federal registration and reporting requirements? What reporting will staff provide to senior leadership of such activities to ensure compliance?
- Do we have clear policies, procedures and approval processes governing lobbying, political communications, coalition activities, and public statements related to advocacy?
- Where do we have uncertainty about the legal implications of our advocacy activities, and have we sought legal guidance to inform our decision-making?



From Conversation to Action

The value of the conversations envisioned by the questions above is in what organizations do with what they learn. Once the board and senior leaders have worked through the relevant questions in this guide, the organization should be able to translate that discussion into a clear decision about how, or whether, to engage. The following scenarios based on real-world challenges illustrate how organizations with different circumstances might use this guide and its decision-making framework to move from broad questions about advocacy to more intentional decisions about their role.

These examples are not intended to prescribe a particular course of action. Instead, they demonstrate how boards and senior leaders might use the framework in this guide to identify the questions most relevant to their circumstances, consider what is at stake, and make a more intentional decision about whether and how to engage in advocacy.

Example 1: From Research to Advocacy

The situation

For many years, a national nonprofit has built a strong reputation for objective research and data on an issue central to its mission. Its findings increasingly point to policy changes that could improve outcomes, and organizational leaders believe their research could have greater impact if the organization became more active in policy discussions.

Some board members, however, worry that advocacy could make the organization appear political or cause policymakers, funders, or the public to question the objectivity of future research. The organization has never developed a clear philosophy about where research ends and advocacy begins.

Where they might start in the guide

This organization might begin with **Identifying Mission-Critical Policy Priorities, Aligning on Assessment of the Political and Legal Environment, Reputational Risks**, and **Exploring Organizational Structure and Governance**.

Questions from the guide to consider

- How does advocacy contribute to achieving our mission and strategic goals, and how can we measure impact on both organizational outcomes and the people we serve?
- Where are we uniquely positioned to influence policy through our expertise, lived experience, research, or community voice?
- What assumptions are we making about risk, and what evidence supports those assumptions?
- How would our engagement contribute to our ecosystem's collective purpose?
- How does our approach to advocacy affect long-term relationships with policymakers, funders, or community? Does our approach encourage constructive dialogue across political perspectives?
- Which strategic advocacy decisions are for senior leaders, and which require board approval? Do we have policies in place to make the roles and decision-making processes clear?

What these questions could help clarify

These conversations could help the organization determine whether advocacy is a natural extension of its research and mission, where its expertise could add distinctive value, which perceived risks are supported by evidence, and what governance boundaries would be needed.

The organization might decide to educate policymakers about its research, provide data or technical expertise to coalitions, take positions on a limited number of issues directly supported by its findings, build additional internal safeguards before expanding its advocacy role, or determine that a more active advocacy role is not appropriate at this time. The goal is not simply to decide whether to advocate, but to establish an approach that reflects the organization's mission, expertise, credibility, and tolerance for risk.

Example 2: Responding When Mission and Community Are At Risk

The situation

A nonprofit has a long history of providing services and support to communities facing significant economic and social barriers. Following changes in the policy environment, organizational leaders believe emerging policy decisions could make it substantially harder for the people they serve to access critical resources and could affect the organization's ability to fulfill its mission.

Staff and some board members believe the organization should speak publicly and advocate for policies that protect its community. Others share those concerns but worry that visible advocacy could expose the organization, its funding, or its staff to political backlash or retaliation.

Where they might start in the guide

This organization might focus on **Identifying Mission-Critical Policy Priorities, Aligning on Assessment of the Political and Legal Environment, Assessing Risk and Reward, Other Stakeholder Considerations, Reputational Risks**, and **Organizational Security**.

Questions from the guide to consider

- How does the current policy landscape affect our ability to achieve our mission?
- How might our advocacy benefit the people and communities we serve?
- What policy priorities are most meaningful to the people and communities we serve? How are we incorporating their voices into crafting our policy priorities?
- What are the consequences for the people and communities we serve if we choose not to engage in advocacy?
- Who else is engaged in advocacy around this issue? Are we the right organization to lead in this space, or are we best served by supporting a better-positioned organization or joining a coalition?
- Whose risks and opportunities are we centering as we consider advocacy on particular issues? Our organization's? Our grantees' or communities'? How do those differ and align?
- What have senior leaders and staff identified as key risks to engaging in organizational advocacy, and what are the plans for mitigating those risks?

What these questions could help clarify

These conversations could help the organization assess both the risks of engaging and the consequences of not engaging. They could surface whether the proposed policy changes are sufficiently connected to mission to warrant action, how community priorities should shape the response, what specific organizational or staff risks need to be managed, and whether the organization is best positioned to lead, partner, support others, or use a less visible form of advocacy.

The organization might ultimately choose to establish a small number of mission-critical policy priorities, work through a coalition, support community-led advocacy, strengthen protections for staff, establish protocols for public statements and rapid-response decisions, or take another approach. The guide helps leadership consider how to pursue mission and community impact while making an informed assessment of organizational risk.

Example 3: Finding a Right-Sized Role for a Small Organization

The situation

A small community-based nonprofit provides programs that give its staff deep knowledge of the challenges facing local residents. Leaders increasingly see that some of those challenges cannot be addressed through programs alone. Decisions by local government affect the resources available to the community and the conditions in which the organization operates.

The organization believes its experience could be valuable to policymakers, but it has no dedicated advocacy staff and limited capacity to take on a major new body of work. Leaders worry that expanding into advocacy could divert scarce staff time and resources from direct services.

Where they might start in the guide

Rather than working through every question at once, this organization could follow the guide's recommendation that smaller organizations select two to three questions per section to consider first. It might begin with **Identifying Mission-Critical Policy Priorities, Organizational Infrastructure and Readiness**, and **Other Stakeholder Considerations**.

Questions from the guide to consider

- How does the current policy landscape affect our ability to achieve our mission, and where are we uniquely positioned to influence policy through our expertise, lived experience, research, or community voice?
- What policy priorities are most meaningful to the people and communities we serve? How are we incorporating their voices into crafting our policy priorities?
- What is the landscape of advocacy by other organizations with similar missions? How could our organization contribute or collaborate on these efforts by adding our unique voice to fill a gap?
- Do we have adequate resources and capacity to achieve our advocacy goals?
- Are we the right organization to lead in this space, or are we best served by supporting a better-positioned organization or joining a coalition?
- Is there an opportunity to fill a gap by taking on an advocacy role relevant to our mission?

What these questions could help clarify

These conversations could help the organization identify the small number of policy issues most central to its mission, understand where its community knowledge and relationships could add value, and determine what level of engagement is realistic given its capacity.

The organization might decide that it does not need to create its own formal advocacy program. Instead, it could build relationships with local policymakers, invite officials to see its work firsthand, provide data or community perspectives to an existing coalition, participate selectively in joint advocacy efforts, or designate responsibility for monitoring a small number of policy issues.

In this case, the guide can help the organization identify a role that matches its resources rather than treating advocacy as an all-or-nothing commitment. Over time, it can reassess that role as its capacity, relationships, or the policy environment change.

Conclusion

Organizations should document where the board and senior leaders have reached alignment, including the organization's priorities, boundaries, and areas that require further consideration. This creates a shared understanding of the organization's advocacy role and provides a reference point when new opportunities or challenges emerge. It can also clarify the respective roles of the board and staff, ensuring that governance decisions and day-to-day advocacy implementation remain appropriately connected. Many advocacy decisions are best advanced by senior leadership doing the analysis, developing a recommended path forward, and bringing it to the board for discussion and approval when appropriate.

For organizations developing or strengthening an overall advocacy approach, these decisions can inform broader organizational strategy. Boards and senior leaders can consider how advocacy fits alongside programs, communications, fundraising, and community engagement, and what resources are needed to support it. Whatever path an organization chooses, the goal is to make that choice intentionally, grounded in mission, and informed by the organization's capacity, communities it serves, and operating environment. Advocacy strategy should be treated as an ongoing organizational decision, with periodic reassessment to ensure it remains responsive to changes in the external landscape and aligned with organizational priorities. Revisit this guide when circumstances call for a reassessment of your advocacy approach.

For additional advocacy capacity-building tools and resources:

Independent Sector:
Advocacy Resource Center

BoardSource:
Nonprofit Advocacy and Ambassadorship

Bolder Advocacy:
Advocacy Evaluation Resources

U.S. Catholic Conference:
Political Activity and Lobbying Guidelines for Catholic Organizations

APPENDIX

Organizational Self-Assessment

The following diagnostic is designed as a quick self-assessment for staff and senior leaders to complete before engaging the board on the factors in this guide. It is intended to help organizations determine how important advocacy is to their long-term success. The goal is not to arrive at a definitive answer but rather to build a shared understanding of the degree to which public policy decisions influence your ability to achieve your mission — for example, the laws pertaining to your issue area (such as minimum wage laws), the government budgets that may provide funds to your issue areas (such as funding for public health programs), and/or the regulations that govern how businesses and nonprofits operate (such as workplace safety standards).

Rate the following diagnostic dimensions on a scale of **1** ***(not at all)*** to **5** ***(very much)***:

1. Looking at our budget, **what percentage of our revenue sources might be at risk if there is a change in public policy?** Could a change in law or regulation affect a government budget that supports our work or donor choices to support our work, given the percentage of our revenue that is dependent on state, local, or federal government funding?

2. **How well do our government representatives (local, state, federal) know our organization and understand the issues** we are working on? Who are the decision-makers that determine whether the public policies relevant to our issue are sustained or changed, and how strong is our relationship with them? How likely would they be to make policy choices that support our work or defend against opposing choices that would attack our work?

3. **If the work of our organization was under threat because of a policy change, would the public speak up?** How well does the public understand the public policies defining the environment in which we do our work?

4. **How involved do our constituents or clients think we should be in influencing public policies?** What policy priorities are most meaningful to the people and communities we serve?

5. **Are the public policies that we rely on (laws, court rulings, regulations, etc.) under threat from opponents?** How likely is it that those opponents will succeed at changing public policies in ways that undermine our mission?

6. **How strong are our current capabilities for advocacy?** How clearly can we explain how advocacy advances our organization's purpose, not only our programs or institutional interests? How well do we understand our role in the broader advocacy ecosystem, including where we should lead, support, partner, or step back? To what extent are the people and communities most affected by relevant policy decisions shaping our understanding of advocacy priorities, risks, and desired outcomes?

7. **How easy was it to answer these questions?** How well are we monitoring the policy landscape that affects our work, and how well-positioned are we to anticipate potential changes that could impact our work?

If your total score is 20 or more, advocacy is likely a critical strategic priority for your organization's success. Consider engaging your board and leadership in a deeper conversation about the factors outlined in this guide. Identify the policy issues most critical to your organization's mission, clarify your organization's advocacy goals, and develop a strategy to engage. This may include building new or deeper relationships with policymakers, convening or joining a coalition, hosting a roundtable to educate policymakers, or engaging in lobbying where appropriate and aligned legally. Consider incorporating an advocacy strategy into your annual or strategic goals.

If your score is 10–19, advocacy may be an important priority. Consider identifying and prioritizing the one or two areas of advocacy that would most benefit your organization. Start with manageable actions, such as monitoring policy developments, signing onto coalition letters, sharing policy information with your networks, inviting a policymaker to visit your organization, or providing policymakers with data and stories that demonstrate how policy impacts their district. Explore the resources, relationships, and internal capacity needed to expand your efforts over time.

If your score is <10, then advocacy may be less of a strategic priority for your organization at this time. Start by gathering more information about how policy decisions affect your mission and identify any gaps in your organization's resources, knowledge, or relationships. Consider light-lift activities such monitoring policy developments and discussing them at staff meetings, attending webinars or briefings to learn more about relevant issues and how other organizations are responding, or connecting with organizations already working on issues that affect your community. As your circumstances or priorities change, revisit whether a more active advocacy role would be beneficial to your organization.