



COMMUNITY FOUNDATION OF WESTERN NEVADA ADVOCACY POLICY

I. Purpose

The Community Foundation of Western Nevada (the “Foundation”) strengthens our community through philanthropy and leadership. The Foundation frequently receives requests for letters of support, requests for collaboration, and also identifies opportunities to improve the community through efforts that involve advocacy on behalf of a particular issue. As the Foundation grows and expands relationships, financial resources, and community leadership activities, the opportunity and need for advocacy as a part of our efforts to improve the quality of life for residents in northern Nevada has grown.

The purpose of this policy is to define advocacy, and other types of advocacy activities and to guide the Foundation’s staff and board as to when, and to what extent, they can advocate on behalf of the Foundation and when approval from the Foundation’s Board of Trustees is required.

II. Definitions

- a. **Advocacy:** an umbrella term for all types of engagement with policymakers (including elected and appointed officials and their staff) that is not specifically considered lobbying under the IRS definition. For the purposes of this policy Advocacy also includes engagement with opinion leaders, organizations, agencies, and coalitions.
- b. **Lobbying:** any activity that attempts to influence or express a view about specific legislation.
 - i. **Direct lobbying:** the attempt to influence specific legislation by expressing a view on that legislation via direct communication with an elected official or any other government official or employee who is involved in the policy making process.
 - ii. **Grassroots lobbying:** the attempt to influence specific legislation via communication with any segment of the general population, where that communication encourages the recipient to act with respect to that legislation.

III. Extent of Foundation Lobbying

The Foundation may lobby to the extent they can under the 501(h) Expenditure test. If the Foundation pays for lobbying, the Foundation must complete IRS Form 5768 and any other necessary documentation.

IV. Foundation Compliance Officer

- a. The Foundation's President and Chief Executive Officer will serve as the Compliance Officer (the "Compliance Officer") who will always remain familiar with IRS rules and regulations regarding limits on the political activity of organizations exempt from federal income tax under Section 501(c)(3).
- b. The Compliance Officer will address Foundation staff, and members of the Foundation Board of Trustees to periodically review the IRS rules and regulations governing political activities of Section 501(c)(3) organizations and to answer any questions regarding specific Foundation activities or programs that may implicate such rules.

V. Activities Foundation Staff May Do Without Board of Trustees Approval

This section outlines the advocacy activities Foundation staff may conduct without requiring approval from the Foundation Board of Trustees. Any questions staff have about an advocacy activity listed below are to be directed to the Compliance Officer.

- a. Share information about the Foundation's work: Foundation staff may meet with, or make presentations to, elected officials, government employees and other stakeholders involved in the policy making process to discuss the Foundation's work.
- b. Discussing broad, social, economic, or other issues: Foundation staff may meet with, or make presentations to, elected officials, government employees and other stakeholders involved in the policy making process to discuss the status of persistent community issues and the Foundation's approach to solving them, including any partnerships or collaborations with other organizations.
- c. Sharing a nonpartisan analysis, study, or research: Foundation staff may meet with, or make presentations to, elected officials or government employees involved in the policy making process to share information found from Foundation research related to community issues.
- d. Hosting events: Foundation staff may host or co-host an event to bring stakeholders together to discuss and identify solutions to persistent community issues.
- e. Writing letters of support: Foundation staff may write letters of support about a government measure that does not specifically pertain to pending

legislation, or to organizations or government agencies seeking to secure funding or grant support.

- f. Self-defense communication: Foundation staff may attempt to influence specific legislation that would affect the Foundation's existence, tax-exempt status, powers and duties, or the deductibility of contributions to the Foundation.

VI. Advocacy Activities that Require Foundation Board Approval

This section outlines the advocacy activities Foundation staff may conduct after receiving approval from the Foundation's Board of Trustees. Any items falling into the categories listed below shall be voted on at the regularly scheduled Board of Trustees meetings.

- a. Direct lobbying and Grassroots lobbying: Before Foundation staff engage in direct lobbying and/or grassroots lobbying regarding a piece of legislation, approval by the Board of Trustees is required. The staff member(s) who will be engaging in lobbying must present to the Board of Trustees a summary of the piece legislation, which includes the arguments for and against the measure in question, and list of potential benefits and drawbacks that may result in lobbying by the Foundation.
- b. Publicly supporting or opposing legislation: Before Foundation staff publicly support or oppose proposed legislation, through written and verbal communication, approval by the Board of Trustees is required. The staff member(s) who will be publicly supporting or opposing proposed legislation must present to the Board of Trustees a summary of the piece legislation, which includes the arguments for and against the measure in question, and list of potential benefits and drawbacks that may result in lobbying by the Foundation.

VII. Prohibited Activities

This section outlines activities prohibited to the Foundation staff, Board of Trustees, and Advisory Board. Staff participation in the activities listed below will result in disciplinary action, which may include termination.

- a. Foundation staff and members of the Board of Trustees and Advisory Board, acting as representatives of the Foundation, may not participate in any political activities including, but not limited to, making contributions to a politician, political party, or specific campaign; attending fundraising events or rallies for incumbent officials or political candidates running for elected office; endorsing a political candidate; distributing statements for or against a political candidate; or advocating for or against a particular candidate for public office. Foundation staff, members of the Board of Trustees, and

members of the Advisory Board, may not participate in political activities while wearing Foundation name badges or other Foundation insignia and may not distribute Foundation business cards while participating in political activities. Foundation staff and members of the Board of Trustees and Advisory Board may participate in political activities in their private capacity.

- b. Foundation staff, members of the Board of Trustees, and members of the Advisory Board may not receive gifts from, or make contributions to, political parties, political candidates, or elected officials, while representing the Foundation. Foundation staff and members of the Board of Trustees and Advisory Board may receive gifts and make political contributions in their private capacity.