

UUSJ AD HOC COMMITTEE ON ADVOCACY PROGRAM OVERSIGHT & SUSTAINABILITY

Recommendations Presented to UUSJ Board of Directors

Quarterly Board Meeting

June 13, 2020

ADVOCACY PROGRAM OVERSIGHT: OPTIONS

- **Option 1:** Entire board weighs votes on every AC/WHWN policy topic.
- **Option 2:** The Executive Committee passes on each AC/WHWN policy topic.
- **Option 3:** Create a Policy & Advocacy Review Committee (PARC) of the Board (similar to the Advocacy Oversight Committee) to oversee the Advocacy Program, and to make recommendations to the Board of Directors/Exec Comm on board-level decisions
- **Option 4:** Create an Advocacy Implementation & Management (AIM) Team –
 - Advocacy program staff, contractors and volunteer leaders
 - Responsible for the day-to-day implementation of UUSJ's advocacy activities and reporting to the Board
 - Major decisions elevated to PARC and/or Executive Committee

**ADVOCACY
PROGRAM
OVERSIGHT:
AD HOC
COMMITTEE'S
RECOMMENDATION
TO THE BOARD –
BOARD APPROVAL
REQUIRED**

- **Create a Policy & Advocacy Review Committee (PARC) of the Board:** The primary role of PARC will be to provide oversight of the advocacy and policy programs, with specific responsibilities.
- **Create an Advocacy Implementation & Management (AIM) Team:** The Advocacy Implementation Team will be responsible for implementing the programmatic and daily operations of the Advocacy Program, will keep the Policy & Advocacy Review Committee (PARC) informed of its activities.
 - proposing the AC/WHWN policy topics and legislative requests.
 - Managing the Advocacy Corps and WHWN partner congregations to plan, prepare for, and complete all activities related to the Advocacy Program.
 - collaborating with the UUSJ internal policy working groups and strategic partners to assure alignment in strategic tactics and messaging related to the UUSJ annual advocacy agenda, making decisions on external partner requests (i.e. signing onto coalition letters, etc.).
- **The Ad Hoc Team suggests there be a designee on the Executive Committee** that possesses a strong background in advocacy and understanding of the UUSJ Advocacy Program who is delegated the responsibility for reviewing and making decisions in real-time re: actions of the Advocacy Implementation Team that require consideration before implementation.

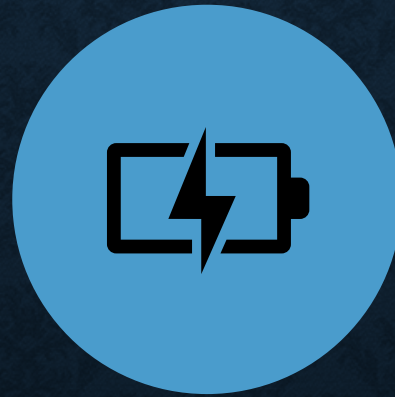
ADDITIONAL COMPONENTS OF ADVOCACY OVERSIGHT PROCESS

- **Development of Policy & Advocacy Agenda**
 - Policy Issues Survey Every 2 Years
 - Informed by input, feedback and collaboration from external partners and moral owners
 - To be reviewed annually
- The UUSJ National Policy Priorities & Advocacy Agenda will be reviewed annually
- The AIM Team will maintain the following minimal reporting requirements to the Board of Directors:
 - prepare written and/or verbal report to a newly established oversight committee of the Board (see recommendation later in this document) on specific topics related to the advocacy program *when requested*;
 - complete quarterly written and verbal reports in preparation of and during Board of Directors meetings;
 - submit updates into the UUSJ email newsletter so that the full membership, moral owners and other stakeholders can continue to stay abreast of UUSJ's advocacy activities.
- The PARC will be responsible for proposing and reviewing budgetary and staffing issues; program scope; assuring organizational compliance with federal tax and lobbying disclosure laws; and monitoring/evaluating the Advocacy Program.

ADVOCACY PROGRAM SUSTAINABILITY: CHALLENGES



SCOPE



CAPACITY



RESOURCES

SCOPE: OPTIONS FOR ADVOCACY OVERSIGHT



OPTION 1:

Postpone all further WHWN and Advocacy Corps Activities (virtual or onsite) through 2020, and focus resources solely on the following capacity building/ preparations for the new Congress/ Administration (resuming activities at some level in 2021).



OPTION 2:

Maintain one WHWN & Advocacy Corps Campaign every month, but with a reduced scope of activities for each campaign.



OPTION 3: Decrease/Limit frequency of WHWN/Advocacy Corps Activities to one WHWN/Advocacy Corps Campaign every 8 weeks, stretching out the existing 30-day

CONSENSUS RECOMMENDATION FOR BOARD CONSIDERATION RE: SCOPE

Decrease the number of WHWN/Advocacy Corps Campaigns to a total of four remaining events in 2020 (July, September, October and December). This will allow UUSJ to also sustain our regular advocacy program components, sustain the momentum of our Advocacy Corps/WHWN partners, and at the same time implement some (but not all) preparatory activities for 2021.

- Four additional campaigns, with multiple tactics/activities (letter writing, emails, calls and/or texting; potential virtual webinar briefing for larger group of Hill staff)
- 1-3 Advocacy Corps Virtual Meetings with Key Hill Staff/Campaign: To include constituents from partner congregations, AC member(s), Advocacy Implementation & Management Team (AIM), and policy SME or policy working group member
- Merge/combine some of the meetings for Advocacy Corps/WHWN per month or pare down the number/frequency of these meetings (up to AIM team).
- Considered by Ad Hoc Committee as Activities that Must be Completed in 2020

CONSENSUS RECOMMENDATION FOR BOARD CONSIDERATION RE: SCOPE

Considered by Ad Hoc Committee as Activities that Must be Completed in 2020

1. Activities already in motion

- a. Advocacy Advanced Training – for Advocacy Corps Members
- b. Advocacy Training for UU Partners (congregations and individuals in Congressional Districts interested in participating in virtual meetings with Hill staff in the future)

2. Other Activities

- a. Work on creating inventory of policy SMEs within UUSJ network
- b. Work on Congressional power-mapping project
- c. Reconfigure advocacy sections of website (only involves three people -- Peter, Lavona and Paulette only)

CAPACITY & RESOURCES: SHORT-TERM SUSTAINABILITY STRATEGIES

- Consider entering into short-term contract (mid-June to mid-September, with possible extension through end of calendar year depending on available resources) with individual to take on significant percentage of program coordination tasks. There is \$12,000 in funding available to support short-term part-time contracting through the end of the year. However, given the organization is operating under a structural deficit, there are few resources available to support a permanent position, and more funds need to be raised to adequately fund the advocacy program.
- Work with Executive Director to lay out scope of activities that the ED will take on; what tasks the administrative assistant will be expected to complete related to supporting the advocacy program. Scoping of activities should also include discussion of what tasks may need to be removed from staff's existing portfolio to allow for more focused attention on the advocacy program, as well as expectations regarding recording work activities for grant reporting and IRS reporting purposes.

**CAPACITY &
RESOURCES
ADDITIONAL
QUESTIONS TO
ADDRESS**

- What elements of the advocacy program require different expertise/capacity than what paid staff can offer, and how will this be addressed?
- What steps will UUSJ take to recruit and cultivate additional volunteer leadership to help implement and manage some of the activities of the Advocacy Program moving forward?

NEXT STEPS

- The Ad Hoc Committee would like the Board to consider and vote on the recommendations related to program oversight. The recommendations for program sustainability are still in process.
- The Ad Hoc Committee would like to continue to convene over the summer to help with the implementation of the oversight recommendations and the short-term proposed staffing/transition plan, and to make determinations related to leveraging paid staff with potential contract support and volunteer capacity, in the long-term.