

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: DECISIONS MADE AT JUNE 2020 MEETING

- 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
- 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
 - Major decisions elevated to PARC and/or Executive Committee

ADVOCACY PROGRAM OVERSIGHT: WHERE WE ARE AT NOW

- **An additional member was added to the Executive Committee** that possesses a strong background in advocacy and understanding of the UUSJ Advocacy Program.
- **Working to 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.
- **Working to 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.).

UPDATE ON PARC/AIM DEVELOPMENT

Advocacy Implementation Team

- September 2020 was a great litmus test for how the AIM should be defined on a monthly basis prior to each campaign, and helped firm up what areas of work will be handled by paid staff/consultants v. policy working group and volunteer leaders. Also helped look at what capacity questions may arise to inform scope

Policy & Advocacy Review Committee (PARC)

- It is recommended that the Board move forward in opening up nominations/volunteers for the PARC. However, there are key scenarios that the Ad Hoc Committee has wrestled with in terms of defining the parameters around eligibility. The strategic planning process and future governance policies will likely address this but we don't recommend waiting that long to formalize the PARC
- Suggestion: have the Ad Hoc Committee lay out a description of the roles/parameters and then share with the Board.
- **Board Decision Point: Should the PARC only be comprised of board members?**

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.

ADOPTION OF BOARD CONSENSUS RECOMMENDATION 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)
- At least 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).

ADDITIONAL WORK ON SCOPE/WORK

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)

Activities to build Resources/Capacity

1. Pursuance of UUFP Grant
2. Researching other Grant options

**CAPACITY &
RESOURCES:
SHORT-TERM
SUSTAINABILITY
STRATEGIES**

- Hired Anna Hooker (mid-June to mid-September, with possible extension through end of calendar year depending on available resources) to take on significant percentage of program coordination tasks around the *Write Here Write Now* campaign and helping schedule virtual Hill meetings.
- Have been working in real time with the Executive Director to lay out scope of activities that the ED will take on; what tasks paid staff and consultants will be expected to complete related to supporting the advocacy program; and outlining what additional supports are needed from volunteer leaders.

CAPACITY & RESOURCES

**ADDITIONAL
QUESTIONS WE
CONTINUE TO
ADDRESS IN
REAL-TIME**

- 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?