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INTRODUCTION

United Way’s call to action, LIVE UNITED, is an invitation for everyone to give, to advocate and to volunteer, and advocacy is becoming a central part of how we pursue our community impact goals. Yet, in contrast to some well-defined guidelines in other areas of our business model, our United Way network does not have written guidelines on how to engage in advocacy.

To help guide our network of local and state United Ways, the National Professional Council convened a work group to outline principles to guide advocacy decisions and practices by United Ways. This document is the result. **Our purpose is to provide shared values and principles for United Way leaders to consider in taking public positions on important policy issues affecting our education, income and health goals.** This guidance is not intended to create enforceable rules or standards, although over time, the values and principles presented may become embedded within our concepts of network citizenship.

Our guidance here is limited to adoption and announcement of United Way positions on public policy issues – that is, attempts to influence changes in public policy passed by lawmakers or adopted and implemented by public officials. We do not seek to provide guidance on operational policy, such as funding requirements, or social issues.

In summary, we recommend United Ways:

- **Adopt a formal process** to evaluate a potential policy goal or position. The point is not to prescribe one process, but to make “mindfulness” more likely thereby increasing chances that United Ways will think carefully about the potential effects of their decisions on the network, the United Way brand and their colleague United Ways.

The process should include:

- Written steps including consultation and cooperation with other United Ways and partners. A sample checklist is offered in the following pages.
- Criteria for assessing the strength of the link of a policy issue to United Way’s mission.
- A forum for board or senior staff leadership to review and use the process (e.g. a policy or advocacy committee).

- **Engage United Way volunteers and staff leadership** at least annually in discussions about United Way values and principles regarding policy advocacy. To assist United Ways in holding these conversations, we offer some sample scenarios below.

Thank you for taking the time to consider the guidance and sample scenarios outlined by your peers. It is our hope that United Ways continue to develop robust advocacy initiatives and that the guidelines enable us to align our efforts and to become more effective in achieving strategic and systemic impact.

LIVE UNITED

Milton Little  
**PRESIDENT**  
*United Way of Greater Atlanta*  
**NATIONAL PROFESSIONAL COUNCIL CHAIR**

Peter Manzo  
**PRESIDENT & CEO**  
*United Ways of California*  
**NATIONAL PROFESSIONAL COUNCIL PUBLIC POLICY WORKGROUP CHAIR**
WHY UNITED WAY ADVOCATES

United Way believes everyone deserves the opportunity for a good quality of life. To achieve that ambitious vision, we cannot rely solely on providing and funding programs (indeed, an increasingly common axiom in the philanthropic world is that we cannot social-service our way to a thriving society). To achieve the greatest impact possible, we need to catalyze social and cultural change that will be more supportive of human development and self-sufficiency for the people we serve. Catalyzing change is the highest level of strategic impact United Way or any philanthropy could hope to achieve, as observed by Michael Porter and Mark Kramer in their canon article *Philanthropy’s New Agenda: Creating Value.*

Advocating for change in attitudes, beliefs, behavior and policies, and mobilizing communities to push for such change therefore is central to achieving our mission. LIVE UNITED is our invitation for all to give, to advocate and to volunteer, and advocacy increasingly is a central strategy for achieving community impact. Not all “game changing” initiatives involve policy changes, but in many fields, such as health, human services, education and social justice, policy changes comprise a commanding share of potential high impact strategic goals.

ADVOCACY: THE LIVE UNITED WAY

United Way’s powerful brand and reputation, and the aggregated relationships and credibility of thousands of member United Ways, give us great potential to change the environment for the people and communities we serve, to increase their odds of success.

Our policy advocacy is most effective when we work together as a network to build a majority of support among policy-makers.

Cooperation and collaboration among United Ways is essential to our ability to reach our community impact goals. No single United Way can increase the national high school graduation rate, or increase financial stability for low-income families across the United States. Under our community impact model, our ability to work productively with our colleague United Ways is critical.

This is particularly true in advocacy. Our policy advocacy is most effective when we work together as a network to build a majority of support among policy-makers. While most United Ways have strong relationships with stakeholders and public officials in their areas, and can easily gain audiences with public officials, that access is not the same as having influence. Every United Way has access, but at the state and national level, we only have influence, some power over policy or cultural change, when we work together.

United Way’s approach to advocacy is to work through the relationships that individual United Ways, and especially their board members, donors and volunteers,

2 Such cooperation is also the essence of good “system citizenship” as set forth in our Standards of Excellence:

4.8: System Citizenship – “Your United Way’s relationships with other United Ways, state associations and United Way Worldwide acknowledge that each member bears responsibilities toward the others. The successes and failures of any one member impact the entire system. Your United Way fosters a high level of trust, information exchange and mutual help with others in the system to further our community impact mission, create a consistent brand experience, and support a strong network of United Ways locally, regionally and nationally.”

1 The three other levels, in ascending order of impact are: consistently choosing the best programs/grantees over time; attracting support to those effective efforts from other funders and charitable organizations; and improving the performance and capacity of effective programs/grantees. (Free access to the article is available at: http://www.fsg.org/Portals/0/Uploads/Documents/PDF/Philanthropys_New_Agenda.pdf)
can bring to an issue. The most effective advocates are those volunteers and donors, rather than United Way staff leaders. The best way to develop our policy goals is to consult and engage United Ways, their volunteers, staff and stakeholders as broadly as possible.

While we should strive for consensus, where there is a critical mass of agreement, United Ways who are neutral or opposed to a particular position should allow the network to move ahead, and better still, support the network’s efforts in concrete ways. United Ways expect this respect from each other even if they or their specific United Way may not feel able to actively advocate on a particular issue.

In addition to advocating for local policies that advance the common good, United Ways are encouraged to advocate on state/provincial and federal policies. Likewise, state/provincial organizations and associations are encouraged to advocate on federal policies. In taking public policy positions, it is important for United Ways to be mindful of the effects their decisions may have on neighboring United Ways, on the United Way network more broadly, and on the United Way brand.

When United Ways take positions on policies that will affect a constituency beyond the scope of their service area, United Ways are advised to consult with their state/provincial association (when present) on state policies and United Way Worldwide on federal policies or local policies that have national implications. Often times, the state United Way and United Way Worldwide can provide additional context that will prove helpful in evaluating positions. Additionally, to strengthen our public policy effectiveness and ensure consistent brand experience, it is helpful for those leading policy at the state and federal level to be knowledgeable of activities by United Ways.

**NETWORK CITIZENSHIP CONSIDERATIONS FOR UNITED WAYS MAKING POLICY DECISIONS**

<table>
<thead>
<tr>
<th>WHAT IS THE POLICY AREA OF JURISDICTION?</th>
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<tbody>
<tr>
<td><strong>LOCAL</strong></td>
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**FACTORS TO CONSIDER**

- **LOCAL**
  - Issue Is Non-Controversial
  - Issues May Have Ripples Through Network
- **STATE**
  - State Association Exists
  - No State Association
  - Issues May Have Ripples Through Network
- **FEDERAL**
  - Specific Piece of Legislation
  - Issue Outside of United Way Federal Policy Agenda

**RECOMMENDED ACTION**

- **LOCAL**
  - Vet and Decide
  - Inform And Consult Those Impacted**
- **STATE**
  - Inform and Consult State Association
  - Inform and Consult Other United Ways in State
- **FEDERAL**
  - Inform and Consult Those Impacted in Addition to State Partners
  - Inform and Consult United Way Worldwide Policy Team

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* In addition to the checklist on pages 6 and 7

** If your United Way is not sure which other United Ways may be impacted, contact United Way Worldwide for assistance. If you are considering a state policy issue that may have ripples through the network, be sure to contact your state association/other United Ways in state in addition to others who may be impacted.
VALUES AND PRINCIPLES
VALUES AND PRINCIPLES

United Way recommends that all United Ways ground their advocacy work in the following values and principles:

ADVOCATE
United Ways are encouraged to speak up publicly for goals.

BE NONPARTISAN
Nonpartisan does not mean neutral, but United Ways should take care that the United Way brand does not become linked with any political party or a particular faction (e.g., labor vs. business).

AUTONOMY
Policy statements or choices to remain silent are decisions for each United Way.

BRAND STEWARDSHIP
Be aware that when we speak, the public does not make a distinction between their United Way and the United Way network or brand.

CONSIDERATION
Think broadly about the impact your advocacy may have on your neighbors and the network. This is the responsibility that comes with local autonomy and brand stewardship.

CONSULTATION
Seek input and guidance from your peers, especially those who may be affected. Consultation is meant to draw on the wisdom and knowledge of our peers to ensure better decisions and actions.

NOTICE AND COMMUNICATION
If you are preparing to take a public stand that may affect your neighbors or the network, give your colleagues advanced notice. This requires reasonable effort to the extent you can identify and reach them. We recognize we may not know or be able to anticipate all consequences for other United Ways that may be affected.

COOPERATION
United Ways should help each other. If a colleague asks for help, try to provide it, even if their policy goal may not be a high priority for you.

DO NO HARM/MIND YOUR ELBOWS
Try not to take a position that hurts another United Way, and as a corollary, when another United Way takes a position that your United Way may not agree with, seek first to respect and support their decision, and engage them directly about your concerns.

POWER OF A NETWORK
We are all most effective when we advocate together, with local business and community partners at home, and United Way colleagues at the regional, state and federal level.
ADVOCACY CHECKLIST

In The Checklist Manifesto,3 Atul Gawande illustrates how even the most highly qualified experts in fields such as aviation, construction or surgery, rely on checklists and written guides that walk them through the key steps in any complex procedure. In that spirit, we offer the following checklist for you to consider when taking a policy position:

MISSION LINK

☐ Is the subject of the proposal closely related to one or more of our impact goals?

☐ Would the proposal significantly advance one or more of our impact goals? Would it hinder our goals if we do not take a stand?

☐ How directly would the proposal affect our impact goal(s)?

ALIGNMENT WITH UNITED WAY BRAND AND PUBLIC ENGAGEMENT

☐ Is the policy issue one that builds and supports existing community and organizational work?

☐ Can we be involved in the issue in ways that are consistent with our organizational values?

☐ Is the issue one we can advance in a non-partisan way?

☐ Is the issue important to United Way Worldwide and other United Ways?

☐ Is there a broad base of support, leadership and involvement among our partners and constituencies for this issue?

☐ Have we explored opportunities to build consensus, or to constructively engage likely opponents?

☐ Would involvement help or hurt our credibility and non-partisan political capital over the longer term?

ABILITY AND ROLE OF UNITED WAY

☐ Would United Way’s voice or brand add value?

☐ What is the best way United Way can help achieve the impact goal?

☐ Endorse and actively support the proposal?

☐ Convene community leaders to discuss pros and cons?

☐ Educate constituents and stakeholders more broadly on the issues involved?

☐ Would involvement for or against the proposal help or hurt our development of resources or important relationships?

☐ Can we clearly define what would be a successful result?

☐ Do we have adequate organizational support and leadership (capacity)?

☐ Are there financial considerations associated with this effort?

☐ Are there clear partners who can help us?

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RISK ASSESSMENT

☐ Would our involvement cause significant, longstanding harm to critical donor/stakeholder relationships, our brand and reputation, or to our future sustainability?

☐ Is there clear legal latitude to engage in activities to advance this issue?

☐ Are we vulnerable to attacks on our motives (conflicts of interest, undue influence of donors or board members, partisanship), the integrity of our decision process or other threats to our reputation?

☐ Are the right people in our organization (e.g. the board, a committee or senior staff) making the decision?

CITIZENSHIP

☐ Have we consulted with neighboring United Ways, or those we think might be affected, to find out what their position is on the issue, and seek their advice on ways to proceed?

☐ Are there other United Ways in our region, state or the national network we should consult with before we adopt the proposed action, including a formal or informal state association?

☐ Does the proposal affect a United Way network issue? Should we consult with United Way Worldwide policy staff?

☐ Weighing all of the above, would the risks of taking action to support or oppose the initiative be justified by the possible rewards?
SAMPLE CASES FOR DISCUSSION

Please use these examples as a discussion tool at your United Way to contemplate what you would consider in making a decision in the various cases.

STAKEHOLDER IMPACTED BY ISSUE – CORPORATE PARTNER

EXAMPLE
The mayor of Anytown announces a policy to limit the amount of soda a restaurant or food vendor can sell in one transaction. The mayor asks United Way of Anytown to endorse the policy. The purpose of the policy would be aligned with the United Way of Anytown’s health goals of fighting obesity and diabetes, and increasing healthy behaviors, and United Way of Anytown decides to endorse the policy. The United Way of Anytown CEO, realizing that the policy may affect a major beverage and food corporation headquartered in Township, notifies the United Way of Township CEO and also United Way Worldwide that United Way of Anytown is going to publicly endorse the mayor’s policy proposal, and then goes ahead with announcing its endorsement.

As expected, the major beverage corporation expresses consternation to both the United Way of Township and United Way Worldwide. After the endorsement is made public, in another region of the country, the United Way of Metroplex CEO is surprised to learn of the policy endorsement and receives strong protests from an executive of another major beverage company headquartered in Metroplex. The beverage executive in Metroplex expresses serious concern, questions whether the United Way should be taking positions that, in her view, interfere in the marketplace, and urges the United Way of Metroplex to request that United Way Worldwide take steps to prevent future similar actions by other United Ways.

Several months later, a national alliance of beverage companies launches a pilot program with the mayor of Oceania to voluntarily reduce the calorie content of beverages sold in vending machines.

CHECKLIST CONSIDERATIONS:
- Citizenship (Consultation)
- Alignment (Constructive Engagement)
- Risk Assessment (Harm to Important Relationships/Sustainability)

COMMENTS/SUGGESTIONS
In situations involving issues with a broader national profile, or in which it may be difficult to determine which specific colleague United Ways to consult, United Ways should consult with United Way Worldwide policy staff. United Way Worldwide policy staff will help gather any needed background information, including seeking input from staff in other United Way Worldwide departments, and help identify other United Ways who should be consulted.

Also, in situations involving corporate partners, United Ways should consider engaging corporate partners to seek a way to work together toward cooperative solutions, and even share with them United Way’s concerns, prior to taking a public position.
INDIRECT LINK TO MISSION

EXAMPLE
A statewide utility corporation (and strong United Way supporter) asks United Ways to engage in a state ballot initiative which, if passed, will result in an increase in utility rates for all. The utility presents the case that this will disproportionately impact low/moderate income individuals and therefore United Way should take a position in opposition.

CHECKLIST CONSIDERATIONS:

☐ Mission (Directness, Significance)

☐ Ability (Best Way/Alternatives)

COMMENTS/SUGGESTIONS
A great majority of policy issues either affect costs for consumers or affect the amount of funding available to address issues important to the people United Way serves. To decide whether to get involved in a similar situation, having a step by step process for assessing a policy issue, and ideally a board-approved public policy agenda, can be very helpful to United Ways in focusing on a manageable set of high priority issues. This can make it much easier to say yes or no to requests that United Way get involved in an issue.

WORTHY GOAL CAUGHT IN LARGER PARTISAN BATTLE

EXAMPLES
Health Politics
For years, United Way of Anytown participated in network advocacy for the Children's Health Insurance Program (formerly known as S-CHIP). Children's health coverage had been a bipartisan issue for more than a decade, with increasing support leading to hopes that there would be expansion for children. In a new, polarized Congress, however, the issue takes a very partisan tone when it is alleged that S-CHIP expansion would be the first step toward a nationalized health system. Party politics take over the debate. United Way of Anytown engages in discussion with United Way Worldwide policy staff and partner United Ways across the country and joins the network in dialing back the level of engagement considering the partisan linkage.

Education in a Larger Bill Package
United Way of Anytown is contacted by a partner about a congressional proposal to increase federal early education funding. The increased funding proposal is supported by United Way Worldwide, the United Way network and has bipartisan support in Congress. In a strategic move, the chair of a congressional committee has combined the education funding with a larger bill, which is controversial and partisan. The committee chair tells the education advocacy community that if they want the early education funding to pass, they must advocate in support of the larger bill. Local United Ways are asked by a national education advocacy coalition to sign on to a letter to Congress supporting the larger bill. Some United Ways consult United Way Worldwide policy staff and learn the broader bill is embroiled in partisan controversy, and choose not to sign the letter. Other United Ways, unaware of the partisan fight, sign the letter. In the final result, the broader bill passes, but only after the early education funding United Ways sought is stripped from the bill.

CHECKLIST CONSIDERATIONS

☐ Alignment (Nonpartisan Political Capital)

☐ Ability (Choice of Alternatives, Sufficient Resources)

☐ Citizenship (Consultation on Federal Issues)
COMMENTS/SUGGESTIONS
While the strong United Way voice, applied appropriately, can significantly sway a policy discussion, we need to be aware that our advocacy work may at times be outweighed by other political advocates or entities, ultimately resulting in our position being lost in the policy debate. This is especially important considering our capacity in policy is limited. Also, policy issues may shift throughout a debate resulting in additional advocates engaging in a debate that would also result in less of a United Way presence.

POTENTIALLY DIVISIVE SOCIAL ISSUE

EXAMPLES:
Marriage Equality
United Way of Anytown is urged by a major corporate supporter, who cites their own corporation’s anti-discrimination policy, to take a public position in favor of a state ballot initiative legalizing marriage equality. United Way of Anytown publicly endorses the ballot initiative.

Boy Scouts
In the same state with the ballot measure legalizing marriage equality, a board member of United Way of Township offers an observation that United Way of Township’s funding support of the Boy Scouts violates United Way of Townships’ values and its corporate anti-discrimination policy. The full board then votes to change its funding guidelines to bar funding to the Boy Scouts and other groups that violate the United Way’s anti-discrimination policy, but does not take a position on the marriage equality ballot initiative.

Living Wage
The policy committee of United Way of Metroplex, after considering its financial stability goals, recommends that the board approve support of a local Metroplex county ballot initiative that would raise the minimum wage. They decide to support by donating staff time and recruiting volunteers to make calls to voters.

CHECKLIST CONSIDERATIONS
☐ Mission (Direct link to community impact goals)
☐ Alignment (United Way values)
☐ Risk Assessment (stakeholder relationships, nonpartisan political capital)

COMMENTS/SUGGESTIONS
Former Speaker of the House Tip O’Neill was quoted in saying, “All politics is local.” But given our national brand, many times a local decision will suddenly impact surrounding United Ways or become a national headline that impacts all United Ways.

United Ways need to appreciate the significance of a political issue before moving to take a position. If an issue would strike a larger dialogue, it is important to broaden the discussion. If the issue is one that also affects other communities, consult with your state association or United Way Worldwide to consider broader implications.

Policy work is a long road and moving a policy decision through a pre-defined process is important to making a sound decision. Taking time to make decisions with inclusive consultation can be advantageous.
SERVICE AREA: LEGISLATOR FROM ANOTHER UNITED WAY’S SERVICE AREA HAS CRITICAL ROLE ON AN ISSUE

EXAMPLES:

Early Childhood Advocacy
United Way of Anytown has long championed early childhood education as a key impact strategy, and is advocating passage of a bill that would provide funding for universal preschool. The bill is before a state legislative committee chaired by a representative based in United Way of Township’s area, and United Way of Anytown wants to meet with that committee chair. The United Way of Anytown CEO and leadership, reasoning that a representative serving as a committee chair is in that sense playing a statewide role, meets with the chair’s staff in the capital and urges her support for the bill. After the meeting, the committee chair’s staff calls the CEO of their home district, United Way of Township, who is surprised to learn of the visit, and who informs the committee chair’s staff that United Way of Township does not know enough about the issue to support United Way of Anytown’s position.

State Association Engagement
In another state, a coalition of United Ways, working through their state association, wishes to advocate before a legislator who chairs a committee charged with their issue. The committee chair’s home district is served by United Way of Friendlytown, which does not belong to the state association. The state association informs the CEO of United Way of Friendlytown that they would like to work with the committee chair on behalf of the coalition, and invites the CEO to participate. The CEO declines to participate, choosing to preserve political capital for another issue more important to her United Way, but offers advice about the committee chair and her staff, and agrees to speak positively if the committee chair’s staff asks her about the state network’s position on the issue.

CHECKLIST CONSIDERATIONS
☐ Citizenship (Consultation)
☐ Alignment (Brand)

COMMENTS/SUGGESTIONS
Prior to communicating with a legislator serving another United Way, either in a shared jurisdiction or a separate jurisdiction, the CEO or board leader of a United Way should consult with the other United Way whom the legislator serves and request their assistance. The United Way that is asked to assist with their home district should seek ways to support the requesting United Way, in line with sound network citizenship principles. In the example above involving a committee chair, even if the issue is not a high priority to the constituent United Way, the constituent United Way can find ways to support its colleague. For example, the constituent United Way, if contacted by the committee chair’s staff, could say she is supportive of her colleague United Ways, but that the local United Way does not have a position on the issue (so as not to contradict what the coalition is seeking).
COMPETING UNITED WAY POSITIONS ON THE SAME ISSUE

EXAMPLE
A state ballot initiative would significantly increase funding to low performing schools serving low-income students through a modest across-the-board tax. Two key local stakeholders, the chamber of commerce and a coalition of nonprofit education groups, ask United Way of Anytown to support the initiative.

United Way of Anytown knows that the United Way of Township, in the same state, is considering opposing the initiative.

CHECKLIST CONSIDERATIONS
- Citizenship (Consultation)
- Alignment (alternatives)

COMMENTS/SUGGESTIONS
Prior to taking a public position on a state or federal policy issue, such as a piece of legislation or ballot initiative, a United Way should consult with United Way Worldwide on federal issues and state United Way policy staff on state issues. If there is no state United Way, the local United Way can consult with its colleague United Ways throughout the state. United Ways should always strive to avoid using the United Way brand to publicly support positions on conflicting sides of an issue. United Ways may sometimes disagree or see issues differently, but they should try not to make that disagreement visible in public policy pronouncements. United Way’s influence on any policy issue is strongest when United Ways are aligned. United Way Worldwide and state United Way staff can help involved United Ways explore a joint policy position.

POLICY CHANGE ONLY BENEFITS A PARTICULAR CITY, STATE OR REGION

EXAMPLE
Stakeholders and civic leaders ask United Way of Anytown to engage in an advocacy campaign in support of federal legislation that will benefit Anytown (such as an industry incentive or natural disaster funding). The legislation is bipartisan and has support of Anytown’s federal representatives. United Way Worldwide has not taken a position on the legislation because it favors a particular geographic region and does not directly benefit the nationwide goals. The United Way of Anytown makes a public statement supporting the legislation and communicates with their congressional representatives, using its geographic identifier and otherwise taking care to make clear it is speaking for its local United Way. United Way Worldwide staff, meeting with the same congressional representatives on another issue, are unaware of the United Way of Anytown’s support for the bill and when asked about it, cannot speak knowledgeably in support.

EXAMPLE
United Way of Anytown is located in a state with a high cost of living and wants to advocate for a change in the federal funding formula for food assistance grants. United Way Worldwide’s policy agenda supports the food assistance grants but does not take a position on the funding formula. The federal funding formulas distribute a finite amount of funding, so while one United Way’s community would gain funds, another’s would lose resources.

CHECKLIST CONSIDERATIONS
- Citizenship (Consultation)
- Alignment (alternatives)
COMMENTS/SUGGESTIONS
A United Way should communicate its position on any federal issue to United Way Worldwide and any state issue to state United Way policy staff (when present) so they can be aware of the position and look for ways to support it or to avoid presenting the impression to policy-makers that United Ways are not well aligned. When a United Way decides to advocate with state or federal policy-makers solely about an issue of local benefit, the United Way should also make clear that it is speaking solely for itself and its region, not for the national or state network.

NO STATE OR FEDERAL POSITION: CONTROVERSIAL & NON-CONTROVERSIAL ISSUES

NON-CONTROVERSIAL ISSUE EXAMPLE
United Way of Anytown has a strong relationship with a state legislator and is approached by a closely allied chamber of commerce to partner on a bill that would move the community impact work forward. There is an active state United Way and this particular issue, while aligned with broader community impact goals, is not specifically outlined in the state policy agenda.

CHECKLIST CONSIDERATIONS
☐ Citizenship (Consultation)
☐ Ability (Opportunity to build broader partnerships)

COMMENTS/SUGGESTIONS
The United Way of Anytown should consult with the state United Way before taking action. The state United Way may have additional information about the politics and players behind the issue and could prove to be a helpful partner in moving the bill forward. In terms of public policy effectiveness, the state legislator would likely be happy to have many United Ways and the state association also supporting the bill.

CONTROVERSIAL ISSUE EXAMPLE
United Way of Anytown is located in a large urban area with chronic youth violence, often involving illegal guns. In the wake of a shooting spree in another state in which the perpetrator used an unlicensed handgun, the local youth advocacy community starts a campaign to urge Congress to enact new federal gun control legislation. The United Way of Anytown has been asked to support the advocacy campaign.

CHECKLIST CONSIDERATIONS
☐ Citizenship (Consultation)
☐ Alignment (choice of alternatives)
☐ Mission

COMMENTS/SUGGESTIONS
The United Way of Anytown should consult with United Way Worldwide public policy staff before taking a position on the federal legislation. Additionally, the local United Way should consider the impact of the advocacy position on other local United Ways that rely on donors who have strong views against gun control laws. If United Way Worldwide has not taken a position on gun control because of the politics surrounding the issue, the local United Way would be encouraged to refrain from supporting the advocacy campaign on the federal issue.
COMPETING PRIORITIES AMONG UNITED WAYS

EXAMPLES

Network Priorities and Coalition Priorities
United Way of Anytown is located in the congressional district of a powerful congressional committee chair. A national advocacy group is organizing local nonprofits in a campaign targeting the committee chair. The United Way of Anytown has been asked by the national group to support the campaign. The issue is on United Way Worldwide’s federal public policy agenda, but it is a tier three issue. The issue is a high priority for some of United Way of Anytown’s close partners, however. United Way Worldwide has identified the committee chair as a key player on a different issue, which is one of the United Way network’s tier one federal issues. United Way of Anytown opts to preserve political capital with the committee chair and waits to advocate on United Way’s network priority.

Single United Way and United Way State Association Priorities
United Way of Anytown has a good relationship with the speaker of the state legislature, whose district is in their service area. The United Way of Anytown is approached by a coalition of colleague United Ways, working through their state association, to assist in advocating for an education bill that is on the state policy agenda. The United Way of Anytown is much more interested in health issues and would prefer to use its relationship to advance its health goals. The United Way of Anytown is challenged to know how to respond to colleagues regarding advocating for the education issue with the speaker.

CHECKLIST CONSIDERATIONS
☐ Citizenship (Consultation)
☐ Alignment (choice of alternatives)
☐ Mission

COMMENTS/SUGGESTIONS
In some cases, multiple communications from United Ways representing conflicting issue priorities may undermine United Way’s effectiveness. When a conflict exists between a United Way network federal or state priority and the federal or state priority of a United Way’s coalition partners, the United Way should attempt to resolve the priorities’ conflict in favor of the United Way network. In communication with policy-makers about public policy issues, a United Way should not communicate a distinction between its priority and the United Way network’s priority.
FURTHER READING

For additional information on United Way’s approach to public policy work and policy priorities, please visit:

www.online.unitedway.org/advocate

www.unitedway.org/public-policy/