

Organizational Advocacy Policy Template

Module 4.4 — Organizational Advocacy: Draft Policy for Board Adoption

How to Use This Template

Complete each section below. This is a real document — write it as if it will actually be adopted by your board. Sample language is provided in brackets; replace it with language specific to your organization. Have an attorney review before formal adoption.

Section 1: Policy Statement

Field	Content
Organization name:	
Policy title:	[Organization Name] Organizational Advocacy Policy
Effective date:	
Approved by:	Board of Directors
Policy statement:	[Organization Name] is committed to fulfilling its mission through lawful advocacy activities. This policy governs how the organization engages in advocacy, lobbying, and public education within IRS regulations for 501(c)(3) organizations.

Section 2: Permitted and Restricted Activities

List the specific advocacy activities this organization will and will not undertake:

Category	Specific Activity
We WILL engage in:	
We will NOT engage in:	

Section 3: Authority and Spokesperson Designation

Authority Question	Organization Policy
Who may speak publicly on advocacy matters:	
Approval required for public statements on legislation:	
Social media advocacy authority:	
Emergency spokesperson (if primary unavailable):	

Section 4: Staff and Volunteer Training

Training Element	Policy
Who receives advocacy training:	
Training frequency:	
Training content (topics covered):	
Training documentation method:	

Section 5: IRS Compliance Tracking

Compliance Element	Organization Approach
Lobbying activity tracking method:	
Who tracks lobbying expenditures:	
Reporting frequency to board:	
Has organization filed 501(h) election? (Form 5768)	Yes / No / Under consideration
Legal counsel contact for questions:	

Section 6: Policy Review

Element	Policy
Review frequency:	Annual
Review responsibility:	Executive Director + Board Chair
Next review date:	