

Connection to Cause

Board members place the work of the organization within a larger cause to understand its place in the system in which it works and to affect changes that better that system when possible. They serve as **ambassadors** and **advocates** for a cause that they are passionate about. They are **leaders** bringing into the organization knowledge, ideas, and connections. They place their role within the context of being a **steward** of an organization operating for the public benefit with support from the general public.

Why?

When a board connects its mission to the larger cause and advocates for it within a larger landscape of individuals, organizations, and agencies:



It becomes part of a network making sure the rules that govern nonprofits provide the right level of oversight.



It expands its strategic vision to include a larger community of individuals and organizations working in the same space, such as government agencies.



It contributes to the changing of circumstances that created the need for their organization in the first place, thus allowing the organization to achieve its mission over time. It connects to root causes and can respond better to change.

Know

Board members should understand these elements of CONNECTION:

- ✓ **Connecting mission to the cause:** Organizations exist within a larger context of circumstances, individuals, organizations, and agencies that impact the work of the organization.
- ✓ **Communication:** Board members have a powerful voice in connecting their organization to the larger causes that people of influence care about.
- ✓ **Advocacy as a tool:** Advocacy can be a powerful tool to advance your cause by partnering with policy makers. It's important to know how to engage in advocacy and lobbying so that your organization is effective and compliant with applicable laws. Lobbying may not be a substantial part of an organization's overall activity.

Show

A board shows understanding of CONNECTION in these ways:

- Board members can articulate the connection between their mission and the cause which the organization is working to advance.
- Board members are ambassadors for the organization, building connections with the community and its leaders.
- Board members engage key community decision makers and those involved in their work in telling the story of the organization and its work.

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Grow

Ask

- Why does it matter that board members connect the mission to the bigger cause and give voice to that cause with people of influence?



How might your organization help guide decisions that impact potentially burdensome oversight requirements or uncover critical data to understanding your cause?



How might the involvement of key community decision makers and other people of influence help your organization to achieve its mission?



What could be done to change the circumstances that cause your organization to exist?
What can your board do to connect the dots between your organization's work and larger issues impacting your work?

Act¹

- Develop a shared vision for the future, including what the world would look like if your organization fully succeeded in achieving its mission.
- Map all of the players who would have a role in shaping this world—think across sectors, including community leaders, elected officials, nonprofit leaders, private sector leaders, etc.
- Identify other organizations working in the same cause as you. Are they doing similar or different work? Is there a gap that no one is addressing?
- Develop a deeper understanding of your work, including all of the causal relationships that create the need for your organization. Invite a guest expert to a board meeting, assign a short article, or plan a field trip to collect new perspectives on the issue at hand. Weave these into the stories that you tell about the impact your organization is making.
- Identify the opportunities and threats that exist outside your organization. Think about the funding climate, policy climate, and trends.
- Embed discussion about these bigger issues into your board meetings, including time on agendas to talk about public policy and how it is important for your organization or the people you serve.

Key documents

An organization expanding its advocacy role should consider reviewing these documents:

- Articles of Incorporation
- Advocacy plan
- One-page handout for decision makers on the organization and its impact
- 501(h) (if organization is lobbying)
- Lobbying tracking document (if organization is lobbying)

¹ Stand for Your Mission: standforyourmission.org

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Pathway

Circle the description that best matches your board. Start by looking at the “Good” column and move left or right as appropriate.

A. Communication

Needs work	Okay	Good	Great
Board members can not give a pitch about the organization.	Board members can give something of a pitch about the organization.	Board members can give a “pitch” about the organization.	Board members can give a “pitch” about the organization that resonates with diverse audiences.
Board members have no stories about the organization.	Board members have at least one story that they can tell.	Board members have a set of stories that they can tell about the organization and the role it plays in the lives of constituents.	Board members have regular ways to gather new stories.
Board members have no brochure or handout.	Board members have a brochure or some handout, though maybe not current.	Board members have a current one-page handout to share with potential supporters.	Board members have customized handouts for different audiences.

B. Connecting mission to cause

Needs work	Okay	Good	Great
Board members have no understanding of how relevant policies affect the organization.	Board members have some understanding of how relevant policies affect the organization.	Board members demonstrate an understanding of how relevant policies affect the organization.	Board members take leadership on policies impacting the organization and cause.
Board members do not discuss nor act on policy positions.	Board members discuss positions on relevant policies but do not act.	Board members take positions on relevant policies (not candidates) that affect the organization.	Board members serve as leaders on policies affecting the organization and others like it.
Board members have no contact with other organizations.	Board members have some contact with other organizations around policy of common interest.	Board members seek coordination or collaboration with other organizations around policy issues of common interest.	Board members lead collaborations with other organizations.
Board has not discussed an advocacy plan.	★ Board has discussed elements of a plan but has not adopted one.	★ Board has adopted an advocacy plan that reflects the organization’s strategic plan.	★ Board leads the development of an advocacy plan in coalition with others.

★ For boards looking to accelerate their advocacy work.

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C. Lobbying & political campaigns

★ *For organizations that take the next step and get involved in policy making.*

Needs work	Okay	Good	Great
Board members do not know that there is a difference between education and lobbying.	Board members know that there is a difference but can't articulate it.	Board members can articulate the difference between education and lobbying.	Board members can educate others about the difference between education and lobbying.
Board members don't know that lobbying is allowed.	Board members know that lobbying is allowed but may not be reporting it.	Board members know that lobbying is allowed in "insubstantial amounts"* with mandatory reporting on IRS Form 990.	Board has made a 501(h) election by filing Form 5768.
Board does not know about the limitations of funding sources to support lobbying.	Board knows of limitations but not the specifics.	Board is aware of the limitations of some funding sources to support lobbying efforts.	Board documents the limitations of funding sources to support lobbying.
Board takes positions and/or engages in political action related to candidates.	Board is neutral on candidates for political office.	Board knows that it is prohibited from political activity for a particular candidate.	Board recognizes the distinction between the board acting as a unit and board <u>members</u> taking positions as individuals.
Board does not discuss or adopt a policy that clarifies the scope of the public policy work that the organization will engage in.	Board discusses but does not adopt a written policy that clarifies the scope of the public policy work that the organization will engage in.	Board adopts a written policy that clarifies the scope of the public policy work that the organization will engage in.	

* "Insubstantial amount" is based on the amount of resources used in lobbying. There is no clear definition from the IRS, but a general rule of thumb is 5% of its overall activities, according to the Alliance for Justice. (www.afj.org)

Connection to Cause



Connection to Cause: Getting to Good and Great

Why does connecting your mission to the larger cause matter to your organization?

Look over your Pathway answers. If you fall more in “Needs Work” or “Okay” than “Good” or “Great” in any section, jot down below what your board should add to its agenda to address this, what actions you or your board could take, and what documents would help you to move forward. The goal is to move your board to “good” or “great” within a timeframe that works for your organization.

Next steps	Lead person	Deadline
Ideas to discuss or topics to research		
Actions to take		
Documents to develop or review		

Other ideas: