



Planning for Policy: A How to Guide

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Phase 1: Build Your Case

Develop a foundation document

- Articulate how advocacy supports your mission
- How advocacy will increase your impact
- What resources are needed to add/grow advocacy
- Define your scope: Local, State, Federal
- Define what advocacy means to you
- Ensure appropriate safeguards

Key: Secure internal support from leadership

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Phase 2: Board Engagement

Begin the Conversation:

- Start with your Board Chair
- Identify champions on your Board
- Refine your foundation document with input from Board members

Anticipate Questions:

- Will you need to hire new staff?
- If so, what funding sources can you identify?
- If using current staff, how much time can you invest?
- What will be the process for vetting policy?

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Phase 3: Develop Your Process

Recommend board committee structure

- To advise staff + board on vetting
- Model advocacy engagement

How will you decide what to support/oppose?

- Process should be transparent
- Build in time for feedback/input
- Tiered approach - rank priorities

Create your criteria:

- Solicit input from leadership + board
- Identify 4-5 key criteria
- Standardize across the organization
- Always be mission focused

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UWBA Vetting Process

If United Way Bay Area is asked (reactive) or seeks (proactive) to take a position on a public policy issue, the following process will be followed:

The policy issue is referred to the policy staff to prepare an issue analysis and recommendation for review by the Executive Office (CEO & COO).



If Executive Office makes determination that issue rises to the level of board engagement, refer to the Public Policy Committee.



Public Policy Committee reviews and recommends position to UWBA Board of Directors.



UWBA's Board of Directors will make the final decision on the organization's position.

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UWBA Vetting Criteria

Fit

- How is issue aligned with org?

Impact

- Who will benefit? How?

Supporters/Opponents

- Who are they?
- What are their key arguments?

Winnability

- What are the challenges?
- What is the likelihood of success?

Costs vs. Benefits

- Weigh pros + cons of taking position

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How UWBA engages in advocacy

- Examples of UWBA advocacy campaigns
- Type of advocacy conducted



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Legislative Visits



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Public Testimony



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Coalitions



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Letters of Support

March 17, 2016

The Honorable Mark Stone
Member of the Assembly
State Capitol, Room 5155
Sacramento, CA 95814

RE: AB 1847 (Stone) Help Californians File for Earned Income Tax Credit -
SUPPORT

Dear Assemblymember Stone:

On behalf of United Way of the Bay Area, I am writing to express our support for Assembly Bill 1847 that builds upon the 2015 creation of the statewide California Earned Income Tax Credit (EITC), which provides a new tax credit to the state's poorest working families *if* those families file taxes and claim the credit for which they are eligible. As an organization focused on improving financial stability for all Californians, we firmly believe the state EITC will further our ability to help mitigate poverty and boost our local communities through economic growth. However, it is crucial that low-wage workers know about this new tax credit.

AB 1847 requires employers to notify their employees of possible eligibility for the state EITC in order to increase the number of families who file taxes and receive benefits.

Because families in deep poverty are not required to file taxes, many people who are eligible for both the state and federal EITCs do not receive the benefit. Without sufficient outreach, many eligible families will not claim this important tax credit to which they are entitled. The IRS reports that California's federal EITC participation rate in 2010 was about 71%, which was lower than the estimated national rate of 79%.

AB 1847 updates the current Earned Income Tax Credit Notification Act, which requires that employers send a notice about the federal EITC to employees at approximately the same time that they send out W-2 forms; the notice informs employees of their potential eligibility to receive the tax credit. This bill would add language to inform workers of the state EITC.

United Way of the Bay Area thanks you for your continued leadership on the critical issue of financial security.

Sincerely,



Anne Wilson
Chief Executive Officer



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== BLOG ==

THE JOURNEY FROM HOMELESSNESS TO FINANCIAL STABILITY

🕒 Posted on **May 31, 2017**, by **Will White** in [Latest News](#) [Featured EKS](#)

Betty is someone who knows first-hand the challenges of being a single mom. She is currently raising her eight-year-old son and 13-year-old daughter and paying the rent and putting food on the table is incredibly difficult on a single income, especially when you're trying to make ends meet in a community with a high cost of living like the Bay Area.

Fortunately, a key government program, the [Earned Income Tax Credit \(EITC\)](#), provided a critical cash supplement that helped Betty make a better life for her family. [Betty learned about the EITC through United Way Bay Area's free tax preparation service Earn It! Keep It! Save It!, and the savings helped her develop a path to financial stability.](#)



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TRENDING:

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“The main ingredient of stardom
is the rest of the team.”
– John Wooden, Head coach, UCLA



Opinion > Commentary

Guest commentary: State Earned Income Tax Credit will help those who are struggling



By ANNE WILSON and TONY THURMOND |

PUBLISHED: May 5, 2015 at 12:10 pm | UPDATED: August 15, 2016 at 10:02 am

California has the highest poverty rate in the nation. A full 23 percent of residents — more than 9 million individuals — are struggling to provide for themselves and their families, despite the fact that two-thirds of these households have at least one working member.

Know where
to go in an
emergency.

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Social Media

Date	Topic	Subject/Sample Post	RAC
	Week 1 - May 1 -5		
		Theme: Education	
1	Monday	Do you need information & support services? Check out this resource page: http://bit.ly/1LWb0Ut or #Dial211	Jennifer
2	Tuesday	Almost \$139 million in #CalEITC has been claimed by Californians. You can still file for free at www.myfreetaxes.org if you didn't.	Will
	- Spanish	Mas de \$139 millones han sido reclamados del credito #CalEITC. Todavia puede reclamar GRATIS en www.myfreetaxes.org	
3	Wednesday - English	Got coverage? Medi-Cal is open all yr. Special enrollment @CoveredCA now. Contact United Way http://bit.ly/1LWb0Ut #Asegurate	Danielle
	- Spanish	Tiene #seguro de #salud? Es posible inscribirse en Medi-Cal todo el año! http://bit.ly/1LWb0Ut #Asegurate	
4	Thursday	Schools must provide necessary medical services to #students w/ disabilities. #Medicaid pays for that: bit.ly/2pBvMs7 @CenterOnBudget	Michelle
5	Friday	Universal pre-k improves kids' #health in powerful ways: read.bi/2o6EXvP via @BI_Science #ECE	Susan

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Things we learned along the way

- Identify board champions early
- Pace yourself – it's a marathon, not a race
- Coalition work is key to achieving big advocacy wins
- Advocacy can be just the thing to get some of your donors/volunteers excited!

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UWBA POLICY TEAM

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Thank You!

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