

Sustainable Westchester  
Guidelines and Process for Public Policy Advocacy  
Approved March 31, 2015

Sustainable Westchester has a unique and essential role to play in the policy process with respect to issues related to its mission: energy efficiency, Advocacy allows the organization to serve its member municipalities and promote its causes through educating the public and policymakers, organizing, lobbying, and more. As permitted by the Internal Revenue Service, the organization has elected to engage in lobbying and undertake other forms of advocacy to further its mission. The extent of lobbying that the organization can undertake is subject to the limits imposed by the IRS election.

As a membership organization it is important that Sustainable Westchester take policy positions that are clearly and definitively within the scope of its mission and as approved by its Board of Directors. The following guidelines and process for public policy advocacy are adopted to ensure that the interests of the full membership of the organization are reflected.

#### Process and Criteria

The Executive Director, or a member of the Board of Directors, will bring recommended public policy positions related to support or opposition for legislation, regulatory actions, initiatives or other public policy efforts. These must be brought forward to the Board for discussion at a regularly scheduled Board meeting, with advance notice to allow Board members to familiarize themselves with the proposed action and seek necessary guidance.

The following criteria will be used to determine whether to engage in the policy issue:

- The proposed policy falls within the mission of Sustainable Westchester:
- The policy directly relates to current activities or a strategy of Sustainable Westchester that has been previously approved by the Board of Directors.
- A governmental body or partner organization requests the proposed policy support/opposition.
- Sustainable Westchester's voice, credibility and/or resources will make a difference on the issue.

No prior approval is needed from the Board of Directors where an issue is time-sensitive, requires urgent action, and clearly falls within the broad strategy areas of the organization's mission. The Executive Director or a member of the Board of



Directors will report on his/her actions to the full board at the next regularly scheduled meeting.

Sustainable Westchester shall not intervene, directly or indirectly, in any legislative, litigation, rulemaking, or other policy activity that is outside of its mission and not within an approved strategy of the organization as determined by its Board of Directors.

#### Legal Reporting

A separate guideline (Political Campaign Activity and Lobbying) has been developed and adopted. Any action the Board takes to support/oppose legislation or other policy issues will result in the need for timely tracking and reporting of staff time and expenses associated with taking action on the issue.

