

MEMORANDUM

To: CFGB Board

From: George Gaskin, Sr. Director of Gift Planning & Compliance

Date: April 23, 2026

Re: Revision to Advocacy Policy

Background

The current CFGB Policy to Determine Advocacy of Issue Positions (the “Advocacy Policy”) was last amended and approved on October 20, 2016.

Last year, our President & CEO was asked by another organization to sign onto a letter regarding Medicaid and SNAP cuts. At the time, sign-on letters were not specifically addressed in our Advocacy Policy, although we had an informal policy that we followed in that situation. CFGB staff feels it prudent to formalize our policy for this situation.

The proposed revisions would outline the required procedures when CFGB is considering signing onto an advocacy letter and would also clarify that “advocacy” does not include self-defense and/or sector-defense activities.

Recommendation

CFGB staff recommends the Board approve the attached revised Advocacy Policy.

THE COMMUNITY FOUNDATION OF GREATER BIRMINGHAM
Policy to Determine Advocacy of Issue Positions

As a 501(c)(3) organization, The Community Foundation of ~~the~~ Greater Birmingham may advocate on issues of concern to the organization, and may devote staff and financial resources up to the limit allowed by law to advocate and lobby on their behalf. The Board Chair and President -- and other Staff members, officers, Board members or volunteers as authorized by the Board or the Executive Committee -- may only advocate on issues on behalf of The Community Foundation that have been reviewed and approved by the Board or the Executive Committee, acting on behalf of the Board of The Community Foundation, which shall have authority for policy issues and shall have oversight authority for all advocacy activities conducted on behalf of The Community Foundation.

Such an approval requires the following components:

- The issue falls within a current funding priority area of The Community Foundation.
- There is significant investment of discretionary dollars and/or staff resources by The Community Foundation in areas affected by the issue.
- The issue is large in scope (i.e. it affects large numbers of people and has a significant impact on their lives).
- There is significant staff knowledge about the issue and about donor interest in the issue.
- There is an opportunity for The Community Foundation to take a ~~pro-active~~proactive, rather than reactive, position on the issue.
- The Community Foundation's voice could help shape the outcome on the issue

A position statement shall be developed that demonstrates clearly The Community Foundation's views on an issue. Any such advocacy work must fall within clearly defined limits for staff time and budget, and must comply with any legal restrictions on direct or grassroots lobbying. Individuals authorized to speak and negotiate on behalf of the Foundation for this issue in addition to the Board Chair and the President of the Foundation must be clearly identified. Further, no one is to advocate on issues beyond the scope of the position statement and restrictions without first consulting and receiving approval from the Board or the Executive Committee of the Board, acting on behalf of the Board.

When The Community Foundation is considering signing onto an advocacy letter alongside other organizations, the President will confer with the Board Chair regarding whether to sign on. Due to the time-sensitive nature of sign-on letters, the President will

then inform the Executive Committee of the decision rather than seek its approval. If no Executive Committee member raises a significant concern within a defined time period, the President will proceed. Because signing on to a group advocacy letter entails a lower level of commitment than a full-on advocacy effort by The Community Foundation, it does not require satisfying all of the components bulleted above; however, these components shall still guide the decision.

Advocacy does not include activities by the President to educate elected officials about The Community Foundation specifically or about the broader community foundation industry, including efforts related to the preservation and protection of The Community Foundation's existence, tax-exempt status, organizational structure, etc.

Approved July 28, 2003

Amended and Approved October 20, 2016

Amended and Approved May 21, 2026