

Weathering the Storms: How to Protect Your Organizing against Opposition Attacks A Comprehensive Toolkit and Technical Assistance Program from RoadMap

Getting and Keeping Your House in Order: Our Top Twelve Best Practices

Everything on the following checklist is important! More details in the toolkit.

1. Hold regular, well-attended board meetings. Make sure minutes document decisions.
2. Operate within your by-laws. By-laws should clearly spell out mission, including nonpartisan civic engagement & speak to term limits.
3. If you are a membership organization know and follow state requirement for membership orgs.
4. Adopt whistleblower and conflict of interest policies, as now required by IRS (990).
5. Know and stay current with all state and local registration and reporting requirements.
6. Know and follow all required employment practices. All staff should have a copy of the personnel manual and training on these policies.
7. Manage, screen and supervise all volunteers.
8. Have written fiscal policies and procedures.
9. Understand and rigorously comply with all federal, state and local lobbying documentation and reporting requirements.
10. Document steps taken to ensure that (c)3 civic engagement is nonpartisan.
11. If you have an affiliated 501(c)4 organization be sure cost sharing agreements under legal review and staff are well trained.
12. Have a Crisis Response Plan in place. Develop threat assessments and opposition research protocols. Create a Crisis Management Team and train all staff in its use, clearly defining roles, responsibilities, notification protocols, how to handle inquires, and messaging guidelines.

To find out more about this comprehensive toolkit and request technical assistance, visit www.RoadMapConsulting.org and make an appointment.

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