



## Policy and Procedure

### **Title: External Communication Authorization, Development, Review, and Approval**

The following establishes the California Stormwater Quality Association's policy and procedure for authorizing, developing, reviewing, and approving CASQA external communications. CASQA external communications are formal written and verbal communications, including but not limited to letters, comments, presentations, and testimony made on CASQA's behalf to represent the organization's positions, views, or decisions. This Policy and Procedure is not intended to and shall not restrict the ability of CASQA Officers or the Executive Director from exercising their authorities and responsibilities as defined in the Bylaws (Officers) or Executive Director consultant agreement.

#### Representation

No person may identify or represent positions, views, or decisions in formal written and verbal communications as being from or associated with CASQA, including its Board of Directors, Committees, Executive Program Committee, and Subcommittees, unless the person is communicating on CASQA's behalf in accordance with this Policy and Procedure.

#### Authority

The authority to develop CASQA external communications is controlled through: 1) CASQA contracts, 2) CASQA's "Consideration and Approval of Regulatory Services Contract Tasks" Procedure, 3) CASQA's "Endorsement or Sponsorship Authorization" Policy and Procedure, and 4) this "External Communication Development, Review, and Approval" Policy and Procedure.

#### Establishing authority to develop external communications

The following procedure will be used:

1. A request to develop formal CASQA communications is sent to or proposed by the CASQA Chair, Executive Program Committee Chair, or CASQA Executive Director.
2. The request should describe the need, the issue, the key messages, the type of communication, the audience, and the schedule, including deadline, if applicable.
3. The CASQA Chair, EPC Chair, or Executive Director either approves or disapproves the request. The CASQA Chair, EPC Chair, or Executive Director may consult the Executive Program Committee or Board of Directors in making a decision. The following criteria should be considered in making a decision:
  - potentially precedent-setting
  - consistency with CASQA's mission and goals, as well as CASQA products, including Progressive Approach, Effectiveness Assessment guidance, Research Agenda, and Strategic Plan
  - provides a membership benefit
  - requestor is a CASQA member
  - need for balanced input on the issue or decision

4. If the request is approved, the CASQA Chair, EPC Chair, or Executive Director selects the CASQA group (i.e., Board of Directors, Committee, Executive Program Committee, or Subcommittee) to oversee day-to-day development of the communication (“oversight group”).
5. The oversight group identifies a person to take the lead in developing the communication. As needed, a small work group to assist the lead person may be constituted.

#### Types of Review

In general, the oversight group is responsible for reviewing and vetting the details (including technical, legal, scientific, financial) of external communications, while the Executive Program Committee or Board is responsible for reviewing the external communications against the policies and strategic vision of CASQA.

#### Templates

As applicable, formal CASQA communications are developed using the following standard templates that include boilerplate text and a standard format:

- Letters
- Presentations
- Testimony

#### Review and approval of communications

The following procedure will be used:

1. The lead person, working as applicable with the small work group, develops the draft communication to the stage that it is ready for review.
  - A. If the selected oversight group is an EPC Subcommittee:
    - i. The draft communication is sent to the Subcommittee members for review, including adherence to applicable template and subsequent revisions, as determined necessary by the Subcommittee.
    - ii. Once the Subcommittee determines that the draft communication is ready for higher-level review, or if the selected oversight group is the Executive Program Committee, the draft communication is sent to the EPC Chair and Executive Director.
    - iii. The EPC Chair and Executive Director review the draft communication and subsequent revisions, as they determine necessary.
    - iv. Once the EPC Chair and Executive Director determine the draft communication is ready for higher-level review, the draft communication is sent to the Executive Program Committee and the Board of Directors.
    - v. The Executive Program Committee and Board of Directors review the draft communication and subsequent revisions, as they determine necessary and submit comments to the lead person with a cc to the EPC Chair and Executive Director.

- vi. Upon determination by the Executive Program Committee and Board of Directors that no further revision is necessary, the communication is considered final and approved for transmittal. The CASQA Chair, EPC Chair, and Executive Director may work together to finalize details of communications once the meaning of the communication is established by the EPC and Board of Directors.
- B. If the selected oversight group is a Committee of the Board of Directors:
- i. The draft communication is sent to the Committee members for review, including adherence to applicable template and subsequent revisions, as determined necessary by the Committee.
  - ii. Once the Committee determines that the draft communication is ready for higher-level review, the draft communication is sent to the CASQA Chair and Executive Director.
  - iii. The CASQA Chair and Executive Director review the draft communication and subsequent revisions, as they determine necessary.
  - iv. Once the CASQA Chair and Executive Director determine the draft communication is ready for higher-level review, the draft communication is sent to the Board of Directors.
  - v. The Board of Directors reviews the draft communication and subsequent revisions, as determined necessary by the Board of Directors, and submits comments to the lead person with a cc to the Chair and Executive Director.
  - vi. Upon determination by the Board of Directors that no further revision is necessary, the communication is considered final and approved for transmittal. The CASQA Chair, EPC Chair, and Executive Director may work together to finalize details of communications once the meaning of the communication is established by the Board of Directors.

#### Review Periods

To the extent possible, the CASQA Subcommittees, Committees, and Board of Directors should be provided five (5) working days to review each iteration of a draft external communication. It is the responsibility of the requestor of a formal CASQA communication and the lead person to establish a schedule that provides these review periods and meets the deadline, if applicable. If alternative review periods are needed or desired, they must be proposed in the original request to develop formal CASQA external communications.