

Guidelines for Faculty and Staff on University Advocacy and Interactions with Government Officials

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I. Purpose of the Guidelines

There are many ways in which university employees engage with government officials and staff in the course of their work, such as inviting officials to campus, testifying at legislative hearings, or visiting legislators in their offices. These guidelines are in place to help ensure those engagements are effective, coordinated and consistent with legal and ethical requirements.

A key goal of the guidelines is ensuring that employees work with the system's and the universities' government relations experts. The University of Illinois System works diligently to craft legislative priorities in the best interests of our students, faculty, and staff. By engaging with our government relations experts, you can help them to understand your needs and to strategically consider how your priorities fit into the system-wide legislative priorities. In this way, we can work across the system to advance shared interests and to ensure consistent messaging and strong relationships with key stakeholders.

II. Summary of the Guidelines

As detailed below, university employees who wish to lobby local, state or federal officials:

1. on behalf of the U of I System or its universities,
2. on behalf of funding requests for U of I programs or buildings, or
3. on behalf of congressional appropriations earmarks

must first contact [state relations](#) or [federal relations staff](#) in the System's Office of External Relations and Communications (ERC).

In other cases involving university-related interactions with government officials or entities, it is strongly encouraged that employees notify ERC and/or their liaison on the [Council on Governmental and External Relations](#) (COGER) for them to report to ERC about such interactions. Faculty and staff are, of course, free to engage in constitutionally protected activities, such as participating in lobbying or campaign-related activities, on their own time.

III. Advocacy That Requires Advance Approval

A. Lobbying/Advocacy on Behalf of the System

Faculty and staff who wish to engage in lobbying or advocacy on behalf of the University of Illinois System and/or one of its universities must notify ERC and/or their COGER liaison in advance. ERC can provide office space, briefing materials, and suggestions for such meetings. Making ERC aware of any planned interactions with government officials can be helpful to ensure that messages are coordinated across all advocacy efforts.

B. State Lobbying Regarding Appropriations

Faculty and staff must go through ERC's appropriations approval process before communicating funding requests on behalf of U of I programs or buildings to legislators. All local and state legislative funding requests need to be signed off on by your university Chancellor and the U of I System President.

If you have a funding request to be added to the U of I System's legislative agenda, please work with ERC and your COGER liaison to obtain Chancellor approval. After your request is approved by the relevant Chancellor, your government affairs liaison will send it to Assistant Vice President for External and State Relations Jennifer Creasey for approval so that it can be added to the U of I System's legislative agenda.

C. Federal Appropriations and Congressional Earmarks

ERC works closely with the Vice Chancellors for Research to develop the system's programmatic priorities for the annual congressional appropriations process. Faculty/staff should reach out to their university's senior research officers if they wish to advocate for inclusion of specific accounts or agencies in the system's federal programmatic priorities.

Any requests for congressionally directed spending – sometimes referred to as “earmarks” or “community project funding” – or congressional appropriations for U of I projects need prior approval by the relevant chancellor and the President of the system.

IV. Other Advocacy and Engagement

A. Outreach and Invitations to Government Officials and Candidates for Public Office

Any outreach or invitations to government entities, officials and staff on behalf of the university should be coordinated with ERC and your COGER liaison who will make ERC aware.

Outreach: The University of Illinois System encourages civic engagement. When an individual is engaging with government officials, however, care must be taken to avoid the appearance that that individual is speaking, acting or advocating in an official capacity on behalf of the System or one of its universities. For example, university resources and identifiers, such as university names and logos, should not be used in communications with government officials that advocate for a particular position or viewpoint unless approved in advance by ERC.

- i. Invitations: Faculty and staff should consult with ERC and your COGER liaison before inviting government officials or staff for a campus visit or talk, or to participate in any university-related off-campus activities or events. ERC interacts regularly with government officials and staff, and we can help facilitate and prepare for a successful visit by, among other things, providing logistical support and information about the official and relevant state or federal issues. ERC will also provide background information about relevant lobbying laws and requirements (see below).

Similarly, faculty and staff should notify ERC and your COGER liaison before inviting *candidates* for federal, state or local office to university-related events. Once notified, ERC can coordinate with the Office of University Counsel and the Office of University Ethics and Compliance to ensure compliance with all applicable laws and rules. Please consult section III below regarding interactions with candidates during the 30 days that precede a contested election.

B. Engaging with Elected Officials and Candidates for Elected Office Within Thirty (30) Days of an Election

The University of Illinois System is nonpartisan and does not take positions on federal, state or local elections or candidates. In order to avoid any appearance that the system is endorsing candidates or engaging in

prohibited political activity as defined by the *State Officials and Employees Ethics Act* ("State Ethics Act"), university employees acting on behalf of the university should avoid organizing, or taking part in, public engagements with federal, state or local candidates for elected office during the 30 days that precede a contested election, including primary elections. Consistent with the definition in the State Ethics Act, the term "candidate" here includes current office-holders.

These guidelines do **not**:

- limit the ability of faculty and staff to engage in constitutionally protected activities, such as participating in campaign-related activities or events **on their own time and without using university resources, etc.**
- prevent candidates from organizing their own events on campus, consistent with applicable laws and university policies (see Appendix: Use of University Facilities by Candidates for Elected Office).
- limit the ability of Registered Student Organizations to organize events (also discussed in appendix).

Similarly, while acting on behalf of the university, employees should avoid organizing, or taking part in, public engagements with senior *non-elected* federal or state officials during the 30 days prior to an election involving the President or Governor, respectively. Please contact ERC [state relations](#) or [federal relations staff](#) if you have questions about who should be considered a "senior official."

Questions about the applicability and interpretation of the *State Ethics Act* or similar compliance-related issues should be directed to the [University Ethics & Compliance Office](#).

C. Responding to Government Inquiries and Requests

Faculty and staff are sometimes contacted by government officials or their staff seeking expertise on particular topics. **Please notify ERC and/or your COGER liaison if you are contacted by a member or staff of the Illinois General Assembly or the U.S. Congress, or a senior official at a local, state or federal agency, regarding university-related matters.** This includes requests for information or invitations to testify before a committee or share your professional expertise regarding university-related matters. ERC can provide context and background information about such requests, while ensuring consistency in communications. ERC also can assist faculty and staff who have been invited to testify by reviewing draft testimony and providing advice and guidance on hearings.

Expert information and/or testimony should include a disclaimer that it does not represent the official position of the University of Illinois System, unless specifically authorized by the President of the system.

D. Participating in Advocacy through Illinois Connection

Illinois Connection is a grassroots legislative advocacy network of employees, students, and alumni from all three universities of the U of I System. Currently, it has over 21,000 members, and it is organized by the University of Illinois Alumni Alliance. Its mission is to gain greater federal and state support for the system. ERC urges the system community to participate in Illinois Connection's calls to action and advocacy efforts. See [link](#) for more information.

Advocacy done as an Illinois Connection advocate is pre-approved by the President of the system so there is no need to contact ERC about participation in Illinois Connection activities. Any colleges, departments or other units that wish to engage in government advocacy should make sure their efforts are coordinated with and approved by Illinois Connection.

E. Federal Lobbying Disclosure Requirements

In order to comply with federal laws, **faculty and staff must coordinate all federal lobbying activities on behalf of the U of I System with ERC**. Pursuant to federal law, any university employee who engages in federal lobbying on behalf of the University of Illinois System needs to complete a lobbying disclosure form each time a lobbying contact is made with a federal official or congressional staff. This form can be accessed by visiting <https://go.illinois.edu/fedLobReport> and should be submitted to ERC within five days of such activity. Accurate and timely submissions are critical to ensuring the system's compliance with the Lobbying Disclosure Act of 1995 and the Honest Leadership and Open Government Act of 2007. Further information about federal lobbying requirements can be found [here](#).

F. Communications with Federal Agencies Regarding Research

Faculty and staff are free to communicate directly with program managers and other agency staff about federally sponsored research without coordinating with ERC. We are, however, happy to help faculty with questions or concerns about such research. The system retains consultants in Washington, DC, who have extensive experience interacting with federal agencies on research issues, and ERC coordinates closely with the Vice Chancellors for Research on issues involving federally sponsored research.

G. Personal Advocacy

Faculty and staff are free to contact local, state or federal government officials/staff directly when acting in their personal capacity (i.e., as private residents on their own time and expense). Faculty and staff should contact ERC if they have questions about what is considered personal versus official advocacy.

Although faculty and staff may indicate their university affiliation and titles when engaging in personal advocacy, the communication should make it clear that they are **not** speaking for or on behalf of the university or the system. We strongly recommend that individuals use their personal phone or personal email account when contacting a local, state or federal legislator in a personal capacity. **This communication should occur before work hours, after work hours, or during any normally scheduled lunch or break, and should not involve the use of any university or system resources (e.g., phone, fax, computer, letterhead, email).**

H. Participation in Professional Society and Association Advocacy

Many faculty and staff are members of professional societies or academic or trade associations that take positions and advocate on federal, state and local issues. While you are free to engage in personal advocacy, please **let ERC and your COGER liaison know if you plan to take part in advocacy efforts**, such as meetings with legislators. In addition to providing information about the legislator or issue, ERC may be able to support such efforts by, for example, providing contact information and introductions.

I. Sign-on Letters and Other Advocacy

Faculty and staff are often asked to sign onto letters expressing support for or opposition to federal or state programs or activities. Employees are permitted to sign onto such efforts or to share emails with work colleagues provided that: (1) the activity in question is not considered prohibited political activity under the *State Ethics Act*; (2) doing so is consistent with the policies of their unit; and (3) they do not purport to speak for their college or university.

V. Conflicts of Interest

If faculty or staff also serve in an elected capacity, or in a policymaking position in federal, state or local government, ERC will not ask them to champion or cosponsor legislation, or to initiate new policy proposals. However, ERC frequently shares information with all legislators and other officials, and will continue to share information with that faculty or staff, in their role as a public official, consistent with other public officials. ERC will keep in mind and be sensitive to the fact that there may be certain bills, policy or regulatory decisions that may potentially impact a member of the faculty or staff who is also a public official, and that they may choose to abstain from voting or taking a position on this matter.

Appendix: Use of University Facilities by Candidates for Elected Office

University facilities may be made available for events organized by or on behalf of candidates for elected office:

- If a candidate for political office requests to reserve a space on campus without the sponsorship of a registered student organization (RSO), they should pay the usual and normal charge for a non-university (external) client.
- RSOs occasionally invite or host candidates to appear on campus for non-partisan, educational events such as debates, lectures, discussion forums, and the like. As long as the proposed event meets facility management policies, RSOs are able to use institutional premises and facilities to host a candidate at any point in time.
 - If an RSO sponsors the event, reservation fees for most spaces are typically waived. However, there are additional fees for audio/video and other equipment that would need to be paid for by the RSO.
 - RSOs must submit space and event management forms through the appropriate student affairs department. RSOs should consult with their respective student affairs staff to ensure compliance with appropriate policies and procedures to ensure success of the event.
- If facilities management is unsure whether an RSO-sponsored event should be regarded as “educational” – and hence eligible for a waiver of room charges – they are kindly asked to consult their university government relations officer for a determination.
- Below are links to the relevant policies for each of the system’s universities:
 - UIC: <https://meetings.uic.edu/reserving-space/>
 - UIS: <https://www.uis.edu/facilities/policies/>
 - Urbana-Champaign: <https://cam.illinois.edu/policies/fo-70/>