



**WHEREAS**, the Ohio Water Environment Association (OWEA) is a 501(c) (3) Organization and a Member Association (MA) of the Water Environment Federation (WEF); and

**WHEREAS**, OWEA strives to take on a significant role in the water and wastewater industry through education, training, and general outreach, and is called upon to render opinions and take positions on a variety of matters.

**WHEREAS**, as OWEA becomes more relevant in the industry and works with other water organizations, there are times when OWEA is asked to work in unity and issue joint statements and/or work together in a collaborative manner.

**WHEREAS**, the extent to which working with other organizations may be an increasing trend, OWEA recognizes the requirement to remain mindful of its tax exemption status under the IRS Code, 501(c) (3), which may be subject to challenge if it is perceived that certain bounds are exceeded.

**THEREFORE**, OWEA has adopted the following policy and procedure for lobbying.

#### **POLICY AND PROCEDURE**

OWEA's policy and procedure on lobbying is defined below. Given the complexity of this subject, unless an activity is prohibited or excluded by reference, these shall be taken as guidelines to promote good decision making.

1. OWEA has been advised by WEF and other experts that it has the ability to undertake a limited amount of lobbying as long as these activities do not constitute a substantial portion of activities conducted by the organization based on activities performed by OWEA as a whole.
2. OWEA's primary function is to serve in consultation with WEF as an expert and repository of knowledge on issues, best practices, and technologies associated with wastewater collection, treatment, reuse and water quality. OWEA shall, in undertaking its normal activities, take the position that it will, first and foremost promote education and the dissemination of education in a nonpartisan form to any and all individuals, groups, or organizations regardless of political affiliation or position or perceived gain. OWEA has been told that it can take certain positions on issues and things, provided that the basis of these opinions is not associated with any political party or the endorsement of any candidate for office. It shall always endeavor to provide a balanced view.
3. When inviting a representative from one party to present at a conference or workshop on an issue, it is advised that views from the other party be invited to present as well.
4. OWEA shall refrain from offering opinions on specific cases and permits that involve the Ohio EPA, USEPA, which are in active litigation, dispute, or appeal unless that opinion is solicited for informational, educational, or scientific clarification purposes and such request has been jointly made by both parties.
5. OWEA shall not enter into Amicus Brief findings with any organization against the Ohio EPA or USEPA, even though it is understood this is done by WEF on occasion.



6. From a financial standpoint, it has been determined that lobbying related expenditures must be below 5% of the annual budget. To justify lobbying related expenditures, OWEA has been advised to maintain financial records to document any activity potential associated with lobbying including the annual Fly In to establish a paper trail, which may be defensible pursuant to audit.
7. OWEA shall not pay consulting fees nor share in costs with other organizations for attorneys or experts to represent them with Ohio EPA, USEPA or other regulatory body in meetings and workgroups to establish policy, procedure or law. OWEA takes the view that this is a direct example of unacceptable lobbying. OWEA takes the position that it is a volunteer driven organization with approximately 2,000 members that willingly donate their time through committee work in representing OWEA in a variety of ways. Paying “experts” to do the same thing is not consistent with the heritage or culture of OWEA, and is not viewed as fair for volunteers.
8. As an operational practice, OWEA understands that lobbying is a complex subject, evades easy understanding, and is subject to continual evolution. Given its tolerance for limited amounts of lobbying, all members of the State and Section Executive Committees, and all members of Committees which represent OWEA publically, shall bring any matter pertaining to lobbying or requests by other organizations on any matter, than directly or indirectly involve lobbying, to the OWEA State Executive Committee for consideration. Consistent with the Policy and Procedure on External Communications, it shall be the preview of the Executive Committee to be open minded in these discussions in favor of requests as long as above guidelines are followed.