

Raising the Low-Income Voice

Case Studies in Democratic Selection Procedures



United Planning Organization (UPO)

Neighborhood-based recruiting, strong tradition of campaigning, independent election certification

UPO Overview

Location:	Washington, DC
Staff Size:	400 employees
Annual Revenue:	\$35,000,000
Service Area:	Washington D.C. and surrounding area
Chief Executive:	Andrea Thomas
Board Size:	21 seats
Major Programs:	Child, Youth, and Family Services (including Early Head Start & Head Start), Job Training and Placement, Housing Assistance, Substance Abuse Treatment, Community Leadership Academy, Shelter Hotline, Community Reinvestment Division
Appendices:	Democratic selection procedures; community election kit (board application); press release; election notice; 2017 election timeline; election poll workers guide; flyers; postcard

As former UPO President and CEO Dana Jones once said, “If you want to make change in communities, you’ve got to create vehicles where people can be part of the change.” Since taking on the role of President and CEO at UPO in 2019, Andrea Thomas has done just that. She has stewarded the democratic selection procedures implemented by her predecessor and expanded them to engage an even broader cross-section of the community. UPO’s robust outreach efforts and partnerships have paid off, as demonstrated

by the record-breaking turnout in its 2020 elections, despite the COVID-19 pandemic.

The UPO board has 21 members and operates on three-year terms. Board members may serve two consecutive terms, after which they must take a break in service of at least one year and then may return for one additional three-year term. This results in a maximum tenure of nine total years. Board terms are staggered, which helps avoid large waves of turnover.

RECRUITING CANDIDATES

One of the board's seven community representatives is elected by UPO's Head Start Policy Council. For the remaining seats, UPO relies on an extensive network of local community organizations to nominate candidates for the low-income representative election. There are no income restrictions on who can run for a board seat. When an election is approaching, a notice is sent to 200-300 organizations, such as Advisory Neighborhood Commissions, neighborhood groups, and other organizations that serve the low-income community. This one-page notice provides some basic information about UPO, the tripartite board, and UPO's upcoming election, and asks the organization for candidate nominations. The board also emails staff, partners, and other contacts with a fact sheet about the upcoming election to engage support in identifying nominees. See the Community Election Kit in Appendix 4.

Alternatively, UPO allows nominations by petition. Individuals who have not been nominated by an organization may gather signatures from at least 10 households in their Election Service Area (ESA, see below) and submit that petition to UPO for placement on the election ballot. Petition signees must be at least 18 years old, and the petition form is included in the board application (see Appendix 2). Andrea says that most candidates use the petition method, rather than being nominated, which she appreciates. "It shows me their commitment," she says. "Serving on the board isn't just a resume builder."

UPO's residency requirements are established in its bylaws and guide the recruitment process: low-income sector representatives are elected to represent specific election districts—called ESAs—within UPO's service area, and eligible candidates must live in the ESA they represent. Though the federal CSBG Act does not establish a general residency requirement for CAA board members, if a CAA chooses to have low-income sector board members represent specific neighborhoods within a community, then those board members must reside in the neighborhood they are elected to represent. See [42 U.S.C. section 9910\(a\)\(2\)\(B\)\(ii\)](#). ESAs are developed through needs assessment data and are updated by the board as community demographics change, but no less frequently than every five years. The ESAs are the geographic areas with

the highest rates of poverty and must have poverty rates that are at least above D.C.'s overall poverty rate.

UPO's multi-pronged recruitment strategy has proven very successful; elections are usually competitive, with two or three candidates on each ballot. The use of social media and virtual open houses for interested candidates to meet current board members has proven to be instrumental in attracting candidates. Occasionally, an election will have up to four candidates, and there have been elections where incumbent candidates have been unseated.



BACKGROUND CHECK

Once the nomination and application processes are completed, candidates' information is submitted to a third-party reviewer to confirm the application is complete, and that all pertinent information is included to confirm eligibility. Then, the information is submitted to UPO's general counsel's office for a criminal background check. Authorization to perform a criminal background check is required as part of the application process for all board members (see Appendix 2). The scope of this check is limited and is not intended to broadly exclude individuals with criminal backgrounds, which would result in the loss of a critical voice. Rather, the board is concerned about convictions that are directly related to the duties and responsibilities of board membership, such as fraud or embezzlement. The board is committed to keeping the scope of the background check narrow and is less concerned about a person's past mistakes and more concerned about an individual's ability to govern.

Once UPO's general counsel completes the background check process and the candidate is confirmed to reside in the appropriate ESA, the nominee's information is submitted to the board's Nomination, Bylaws and Board Governance (NBBG) committee. The committee certifies the nominee for the election, and then UPO begins advertising the election.

PUBLICIZING THE ELECTION

UPO employs a variety of strategies to publicize the election. Information about the election is shared via email and through postal mail to a broad array of contacts, such as supporters, clients, and community organizations. The information shared includes candidate biographies and the time and location of voting. This information is also posted to UPO's social media accounts, such as Facebook, Twitter, Nextdoor, and Instagram. Postings are also shared in community newspapers, community-based centers in the UPO network, and other community locations. UPO also coordinates a "Meet the Candidates Forum" for each ESA, giving voters an opportunity to meet and question candidates.

An important avenue for publicizing the election is the candidates' own campaigning. UPO has found that candidates often run spirited campaigns for election to the board, and while they may not have funds for traditional campaign strategies like paid advertising, word-of-mouth campaigning goes a long way toward informing the community about the elections.

RUNNING THE ELECTION

During the election, UPO aims to maximize voter turnout by placing locked and secured election boxes at multiple locations around the ESA, from UPO offices and program sites to libraries and other community organizations. While there are no income restrictions to vote, voters must live in the appropriate high-poverty ESA. Voters are required to show a photo ID or other proof of residency and must sign their name on a voter register that is maintained by UPO's Election Manager.

Residency documentation is verified by volunteer election poll workers, and UPO has



created an Election Poll Workers Guide with detailed instructions and guidelines for volunteers who are monitoring and assisting in the election process. See the 2011 Poll Workers Guide in Appendix 6.

Once the votes are in, and the secured ballot boxes have been returned to a designated location, the next step in the election process begins: independent verification of the election results. UPO relies on an outside organization, such as the League of Women Voters or an independent accounting firm, to count the ballots and certify the election. When the League of Women Voters has not been available, UPO has always been able to find an accounting firm to handle the task pro bono. This step in the process is one that President and CEO Andrea Thomas is particularly proud of, and she believes it is crucial to safeguarding the integrity of the process and avoiding the appearance that UPO insiders are influencing the results of the election.

After the votes are independently verified, the results are given to the board's NBBG committee to vote on the result. The role of the NBBG committee is not to second-guess the election, but to verify basic eligibility for board service. After this vote, the nominee is sent to the full board to be officially seated on the board of directors.

For UPO, the reality of having such a careful and deliberate process is that it takes time—a typical low-income selection process takes about four months. But for UPO, that up-front investment is worthwhile because it yields committed board members who stay engaged. For a breakdown of the timeline of a typical UPO election, see Appendix 5.

ELECTIONS DURING THE COVID-19 PANDEMIC

When four vacant seats in the low-income sector of UPO's board opened up in late spring 2020, President and CEO Andrea Thomas was confident that her agency's strong record of election turnout would help to sustain participation despite pandemic-related restrictions on in-person gatherings. In addition to sending out notices through the Advisory Neighborhood Commissions and other community organizations, her team publicized the upcoming election and solicited nominations through the neighborhood-based social networking app Nextdoor. They received multiple nominees for each open seat and decided to host a virtual forum on Facebook Live to help the community get to know the candidates.

Current members of UPO's board also filmed short videos, [now displayed on UPO's Youtube channel](#), about what board service entails and what it has meant to them personally. They emphasized that when serving on the board, board members should not just be thinking about the interests of their ESA or Ward. They must put the interests of UPO as an organization at the top of their minds.

Just as it engaged in multiple strategies for recruitment during the pandemic, UPO decided to take a dual approach to its election process. Voters could show up to a UPO service site and vote in-person—socially distanced of course—or

they could download [Mobile Cause](#), a fundraising app for nonprofits that can be used to circulate surveys and petitions. Participants could enter their personal information, including proof of residency within the ESA, into the app on their phone, which sent a message to UPO. Once their eligibility was confirmed by a volunteer election poll worker, the voter could vote for the candidate of their choice via text message. As they had done in the past, UPO engaged the League of Women Voters to open and tally the votes that were cast in-person, adding them to the virtual results.

Once the winners of the elections were announced, Andrea and her team faced another governance challenge unique to the pandemic: welcoming and training brand new board members without meeting them in person. UPO decided to conduct its new board member orientation virtually in two parts, each taking place over four and a half hours on a Saturday. The orientation included a ROMA training, introductions to UPO's different divisions and programs from division directors, a primer on the Organizational Standards, and presentations from the HR and finance departments. Andrea says that the board members were engaged and asked thoughtful questions during their orientation. Understanding that it can be difficult to focus throughout a four-hour virtual session, her team did their best to promote participation and incorporated new topics, like Robert's Rules of Order, into the agenda. UPO will also be conducting quarterly "refreshers" on governance topics at board meetings throughout the year.

ENGAGING AND RETAINING BOARD MEMBERS

Rather than seeing the rules governing low-income sector representation as a burden or an obstacle, UPO views the low-income sector election as an important factor in engaging and retaining board members. It represents their important role in and to the community served by the agency. At a board retreat several years ago, the board was strategizing around the operation of a prisoner reentry program. One of the low-income sector representatives had served a lengthy prison sentence, and his personal experience transitioning back into the community provided a new and deeply valuable perspective to the board.



There are more pragmatic aspects to UPO's board engagement as well. For example, UPO expects to have a "100 percent giving board." There are no minimum donations, but all board members are expected to give within their means, whether that is \$20 or \$10,000.

To remove obstacles to retention in the low-income sector of the board—especially for those members who are low-income themselves, which is typically around half of the sector—UPO will either provide transportation to board meetings or reimburse for expenses. Carpooling is common and carries with it the added advantage of encouraging connections between board members of different sectors and from different backgrounds. The board also now provides members with access to a laptop and Wi-Fi, if necessary, in order to allow them to attend meetings virtually.

The result of UPO's efforts at engagement and retention is a low-income sector with low turnover and few vacancies. Lively engagement of the low-income sector is evidenced by its visible leadership—low-income sector representatives have often served in officer positions in the recent past.

MAINTAINING THE POLICIES AND PROCEDURES

UPO maintains detailed democratic selection procedures in a document that is separate from the bylaws, and those procedures are included in Appendix 1. The Appendices also include a sampling of some of the other documentation related to UPO elections.

LOOKING FORWARD

In the last two years the UPO board has been investing energy into the creation of "content area advisory councils." These councils focus on specific areas of program content, such as training, employment, and youth services, and the councils regularly report to the full board. The composition rules of these councils require that 1/3 of the council be consumers of UPO services. The responsibilities of the councils include making recommendations on program goals, objectives, and implementation, conducting quarterly review of relevant programs, and advising the organization

on community needs. President and CEO Andrea Thomas hopes these advisory councils will function as springboards to board membership and lead to more low-income representation on the board.

The initial version of this publication was created by the Community Action Program Legal Services, Inc. (CAPLAW) in the performance of the U.S. Department of Health and Human Services, Administration for Children and Families, Office of Community Services Cooperative Agreement - Grant Number 90ET0441-03. Updates were made in 2021 by CAPLAW in the performance of the U.S. Department of Health and Human Services, Administration for Children and Families, Office of Community Services Cooperative Agreement - Grant Award Number 90ET0467-03-02. Any opinion, findings, and conclusions, or recommendations expressed in this material are those of the author(s) and do not necessarily reflect the views of the U.S. Department of Health and Human Services, Administration for Children and Families.

Raising the Low-Income Voice

Case Studies in Democratic Selection Procedures



United Planning Organization Appendices

Table of Contents

Appendix 1, Democratic Selection Procedures for UPO Board of Directors	7
Appendix 2, Community Election Kit	11
Appendix 3, 2020 UPO Press Release re Election Procedures	23
Appendix 4, Election Notice to Nominating Community Organizations	25
Appendix 5, 2017 Election Timeline	26
Appendix 6, 2011 Poll Workers Guide	27
Appendix 7, 2020 UPO Board Election Flyer	40
Appendix 8, 2020 UPO Board Election Postcard	41
Appendix 9, 2020 UPO Virtual Open House Flyer	42

Appendix 1, Democratic Selection Procedures for UPO Board of Directors

Members who are Representatives of Low-Income Residents

(Approved 6/14/07); (Reviewed 8/9/10); (Amended 7/21/11); (Amended 1/19/12);
(Amended 3/20/14); (Amendment 9/18/14)

Amendment 05/18/17

- A. The UPO Board of Directors will designate the number of representatives of Low-Income Residents from each Election Service Area (ESA). Areas will be based upon the concentration of poverty within the Wards of the City.
- B. Based on a Board size of twenty-one (21) members, the required one-third representation of low-income residents, and the concentration of low-income residents in the city, the following ESAs have been designated:

ESA	No. Reps	Wards Included	Total Population	Poverty Populations by Ward	% *
1	1	1	82,859	11,186	13.50%
		3	83,152	7,816	9.40%
Total			166,011	19,002	
2	1	2	77,645	10,404	13.40%
		6	84,290	10,536	12.50%
Total			161,935	20,941	
3	1	4	83,066	9,885	11.90%
		5	82,049	15,589	19.00%
Total			165,115	25,474	
4	1	7	73,290	19,935	27.20%
5	1	8A	81,133	30,587	37.70%
6	1	8B			

- C. Elections will be conducted on dates established by the Board in order to fill vacancies for the Representatives of Low-Income Residents.
- D. The UPO Board will appoint a UPO Election Committee that will have custody of all documents and will certify the nominees.
- E. The UPO Board will appoint an Election Manager to administer the election.
- F. Notice of the election and a request for Candidates will be sent to at least one newspaper of major circulation, community newspapers, community-based centers in the UPO Network, and other community locations.
- G. UPO will provide each candidate with an Election Kit (application).
- H. Eligible residents who are interested in becoming a candidate must complete an application and provide it to UPO's Election Manager. Applications will be reviewed for completeness. Applications that are incomplete may be rejected.
- I. All candidates must meet the eligibility criteria set forth in the UPO Bylaws and UPO Governance Guidelines.
- J. Upon certification, candidates will be placed on the UPO ballot for their respective Election Service Area.
- K. UPO will widely circulate an election notice that includes the names of the candidates for each Election Service Area.
- L. UPO will coordinate a "Meet the Candidates Forum" for each Election Service Area so that voters will have an opportunity to meet and question candidates.
- M. For the convenience of voters, a polling place will be identified in each Ward of the city for the respective election.
- N. UPO will engage an independent organization, such as a CPA firm, or the League of Women Voters to monitor all polling places, receive sealed ballot boxes, and count and certify the votes.
- O. Community voters must appear in person. No proxies will be accepted. Voters will be required to show a photo ID, or other proof of residency, and sign their name on a Voter Register that will be maintained by UPO's Election Manager.
- P. Winners will be notified of the unofficial results, by phone, within 24 hours of the voting and in writing after official results have been certified. All others will be notified by mail after the certification has been completed.

- Q. In the event that UPO receives only one application from a specific ESA that meets the eligibility criteria, the election for the specific ESA shall be cancelled and the unopposed candidate will be declared the elected Representative of Low Income Residents for approval by the UPO Board of Directors for the ESA located within the Ward(s).
- R. In the event that UPO does not receive an application from a specific ESA that meets the eligibility criteria, the Election Manager and Nominating, Bylaws and Board Governance Committee will identify a community organization located in the ESA that provides services to and involves low-income community residents in the ESA, to democratically elect and designate a representative for approval by the UPO Board of Directors as a Representative of Low-Income Residents; or the members of the UPO Board of Directors who are Representatives of Low-Income Residents shall democratically elect and designate a representative for approval by the UPO Board of Directors as Representative of Low-Income Residents for the specific ESA.
- S. In the event that a Representative of Low-Income Residents cannot complete his/her term and the candidate with the next highest votes from the specific ESA in that election is available to serve and meets the eligibility criteria, the Election Manager and Nominating, Bylaws and Board Governance Committee shall designate the candidate for nomination to the UPO Board of Directors as a Representative of Low-Income Residents.
- If the Representative of Low Income-Residents ran unopposed in the election or the candidate with the next highest votes from the specific ESA in the election is unavailable, the UPO Board of Directors members who are Representatives of Low-Income Residents shall democratically elect and designate a representative to the UPO Board of Directors as a Representative of Low-Income Residents.
- T. Each elected representative will serve a three-year term in accordance with the UPO Bylaws.
- U. When a representative fails to complete eighteen (18) months of an elected term, UPO will conduct a mid-term election to fill the seat.
- V. Prior to the end of the designated Representative's first term and for Representatives interested in serving an additional term, the UPO Board of Directors may vote to have the Representative serve an additional term, consistent with the Bylaws. The Nominating, Bylaws, and Board Governance Committee will consider the following factors in making a recommendation to the Board of whether to have the Representative serve an additional term: attendance at Committee and Board meetings, participation in the meetings, any

feedback and/or concerns raised by the Representative's community members, compliance with the Board documents (Articles of Incorporation, Bylaws, UPO Governance Guidelines, Democratic Selection Procedures, Conflict of Interest and Related-Party Transaction Policy, and any other Board document in place at that time), and any other relevant information. Consistent with the Bylaws, no member shall serve more than two successive terms and members shall serve until his/her successor has been appointed.

- * **UPO has assessed the level of poverty by Ward and Census Tract based upon information extracted from data provided by the D.C. Office of Planning. Updates will be made as data becomes available.**

Appendix 2, Community Election Kit

UNITED PLANNING ORGANIZATION (UPO) BOARD OF DIRECTORS COMMUNITY ELECTION OF REPRESENTATIVES OF RESIDENTS WITH LOW INCOMES

Join the UPO Board!

Here's *Your* Opportunity to:

- ✓ Make a Positive Impact in the Community
- ✓ Contribute to Strategic Planning to Alleviate Poverty
- ✓ "Friend-raise" and Fundraise to Combat Poverty

The United Planning Organization (UPO), the designated community action agency for Washington, DC, was launched in 1962 to plan, coordinate, and implement human services programs for community residents. Today, UPO continues to offer with a wide array of programs, including: early childhood education; youth development; employment and training; community health; housing counseling; case management; and referrals to other supportive services.

UPO tears down barriers and builds people up. Our staff is hands-on, tackling inequity across the city every day. We change the system and empower people to learn new skills, change their families' lives, and touch the future they've dreamed of.

UPO's Board of Directors is governed by a 21-member tripartite structure. Members represent Washington, DC's 8 wards and the public and private communities:

- ✦ 1/3 are democratically elected representatives of residents with low incomes, including one designated representative of the UPO Policy Council
- ✦ 1/3 are elected public officials or their representatives: one member designated by DC's Delegate in the US House of Representatives and 6 members designated by the Mayor
- ✦ 1/3 are representatives of major groups and interests, elected by the UPO Board

This passionate group of people has the responsibility is to ensure that UPO assesses and responds to the causes and conditions of poverty in the District, and remains fiscally and administratively sound.

SELECTED ORGANIZATIONAL ACCOMPLISHMENTS in 2019:

- 52,430 customers served
- 722 customers obtained jobs
- 859 children educated and nurtured in DC's largest Early Head Start program
- 5,831 youth mentored by senior volunteers (Foster Grandparents)
- 186,834 total volunteer hours
- 81,825 emergency calls answered by Shelter Hotline about people experiencing homelessness

(Source: 2019 UPO Annual Report)

HOW TO APPLY

UPO is seeking 4 people interested in serving as a Representative of Residents with Low Incomes. Open positions are in **Ward 1/3** (jointly), **2/6** (jointly), **4/5** (jointly), and **8B**. If you're Interested, please complete the application to be considered for inclusion on the ballot. Prospective board members are elected by community residents and then approved by the Board.

To apply, you must be at least 21 years old, a District of Columbia resident and live within one of the Election Service Areas (District of Columbia Census Tracts). Election Service Areas (ESAs) are selected based on the economic characteristics of the community. Also, you must be able to complete and pass a background check.

Mail or hand-deliver the completed application to UPO Community Elections, United Planning Organization, General Counsel, 301 Rhode Island Ave., NW, Washington, DC 20001. Applications must be delivered by 5:00pm or postmarked by 11:59pm on Friday, July 24, 2020. Incomplete applications will not be considered. If you have questions about the application process, please send an email to communityelections@upo.org

Application MUST include:	Check Completed
	√
1. Completed Application for Nomination	<input type="checkbox"/>
2. Biography (not to exceed 1 page) which includes hobbies and talents, and Resume (not to exceed 2 pages)	<input type="checkbox"/>
3. Copy of a government-issued Photo Identification	<input type="checkbox"/>
4. Full color headshot of applicant	<input type="checkbox"/>
5. Signed "Statement of Interest" detailing your interest in becoming a UPO Board Member	<input type="checkbox"/>
6. Two signed "Recommendation Letters" (From a non-family member, preferably from someone who knows you from a community, civic, or faith-based organization)	<input type="checkbox"/>
7. Petition signed by members of 10 different households in your Election Service Area	<input type="checkbox"/>
8. Signed Photo Release Form	<input type="checkbox"/>
9. Signed Criminal Background Check Authorization Form	<input type="checkbox"/>
Optional: Self-addressed Return Receipt Request Card (if you want a record that your application was received)	<input type="checkbox"/>

UPO BOARD OF DIRECTORS

APPLICATION FOR NOMINATION

APPLICANT'S INFORMATION

PLEASE TYPE OR PRINT NEATLY IN INK

FIRST NAME	MI	LAST NAME			
ADDRESS (P.O. Box Not Accepted)	CITY Washington	STATE DC	ZIP	WARD	ESA
TELEPHONE NUMBER			E-MAIL ADDRESS		

ELECTION SERVICE AREAS (ESA) (check one)

VISIT WWW.UPO.ORG/COMMUNITYELECTIONS TO CONFIRM

YOU LIVE IN AN ELIGIBLE ELECTION SERVICE AREA BY ENTERING YOUR ADDRESS

OR CONTACT AYANA BIAS: ABIAS@UPO.ORG OR (202) 231-7946 FOR ASSISTANCE.

- ESA: Ward 1/3
- ESA: Ward 2/6
- ESA: Ward 4/5
- ESA: Ward 8B

COMMUNITY AFFILIATIONS

Organization:	Date (s):
Duties and Responsibilities:	
Organization:	Date (s):
Duties and Responsibilities:	

VOLUNTEER SERVICES

Organization:	Date (s):
Duties and Responsibilities:	
Organization:	Date (s):
Duties and Responsibilities:	

Applicant's Affirmation

I swear or affirm that the information provided in this application package is true to the best of my knowledge.

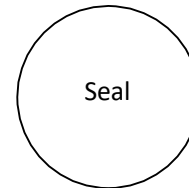
Applicant's Signature

Date

District of Columbia Notary *

On this, the _____ day of _____, 20____, before me a notary public, the undersigned officer, personally appeared _____, known to me (or satisfactorily proven) to be the person whose name is subscribed to the within instrument, and acknowledged that he/she executed the same for the purposes therein contained.

In witness hereof, I hereunto set my hand and official seal.



Notary Public, District of Columbia

My Commission expires on _____

***NOTE:** Free Notary Public Services are available by appointment at United Planning Organization, 301 Rhode Island Ave., NW, Washington, DC 20001. Call Kay Phillips (UPO Office of General Counsel) at (202) 238-4700

STATEMENT OF INTEREST
(Explain why you want to be a UPO Board Member.)

APPLICANT'S INFORMATION

PLEASE TYPE/PRINT NEATLY IN INK

FIRST NAME	MI	LAST NAME			
ADDRESS (P.O. Box Not Accepted)	CITY	STATE	ZIP	WARD	ESA
TELEPHONE NUMBER			E-MAIL ADDRESS		

Please include these items:

- Your passion and commitment to serve underserved communities and residents.
- Why do you want to represent citizens of your ward and what will be your greatest contribution?
- What are your ward's pressing issues and what role have you played, if any, in addressing them?
 (Also, what was the result of your efforts?)

Signature:

1st RECOMMENDATION LETTER (2 are required)

(You can attach signed letters with the requested information instead of using this form.)

APPLICANT'S INFORMATION

PLEASE TYPE OR PRINT NEATLY IN INK

FIRST NAME	MI	LAST NAME			
ADDRESS (P.O. Box Not Accepted)	CITY	STATE	ZIP	WARD	ESA
	Washington	DC			
TELEPHONE NUMBER			E-MAIL ADDRESS		

RECOMMENDER'S INFORMATION

PLEASE TYPE OR PRINT NEATLY IN INK

FIRST NAME	MI	LAST NAME			
ORGANIZATION			TITLE		
ADDRESS (P.O. Box Not Accepted)	CITY	STATE	ZIP	WARD	
	Washington	DC			
TELEPHONE NUMBER			E-MAIL ADDRESS		

1. How long have you known the applicant? _____
2. What is your relationship with the applicant? _____

3. Describe the applicant's community leadership abilities.

4. What are the applicant's greatest attributes?

Provide a brief statement about the role the applicant played in bringing change to the community. _____

Signature of Recommender: _____ Date: _____

2nd RECOMMENDATION LETTER (2 are required)

(You can attach signed letters with the requested information instead of using this form.)

APPLICANT'S INFORMATION

PLEASE TYPE OR PRINT NEATLY IN INK

FIRST NAME	MI	LAST NAME			
ADDRESS (P.O. Box Not Accepted)	CITY	STATE	ZIP	WARD	ESA
	Washington	DC			
TELEPHONE NUMBER			E-MAIL ADDRESS		

RECOMMENDER'S INFORMATION

PLEASE TYPE OR PRINT NEATLY IN INK

FIRST NAME	MI	LAST NAME			
ORGANIZATION			TITLE		
ADDRESS (P.O. Box Not Accepted)	CITY	STATE	ZIP	WARD	
	Washington	DC			
TELEPHONE NUMBER			E-MAIL ADDRESS		

1. How long have you known the applicant? _____
2. What is your relationship with the applicant? _____

3. Describe the applicant's community leadership abilities.

4. What are the applicant's greatest attributes?

Provide a brief statement about the role the applicant played in bringing change to the community. _____

Signature of Recommender: _____ Date: _____



UNITED PLANNING ORGANIZATION

DC's COMMUNITY ACTION AGENCY
301 Rhode Island Avenue, NW, Washington, DC 20001

PETITION TO BECOME A CANDIDATE FOR MEMBERSHIP ON THE UPO BOARD OF DIRECTORS

Applicant's Name: _____ Date: _____

Directions: Please provide signatures of support from at least 10 different households in your Election Service Area. They must be 18 years of age or older.

Please print neatly

	Print Name	Signature	Address
1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			
9.			
10.			

PHOTO RELEASE FORM

I hereby authorize the United Planning Organization to use my likeness and my name and photograph in any and all of its publications, advertising, including website entries and educational training, without payment or any other consideration.

I acknowledge that since my participation in publications, advertising, including website entries and educational training, produced by the United Planning Organization is voluntary. I will receive no financial compensation and waive any right to royalties or other compensation arising or related to the use of the photograph.

I understand and agree that these materials will become the property of the United Planning Organization and will not be returned.

I hereby irrevocably authorize the United Planning Organization to edit, alter, copy, exhibit, publish or distribute this photo for purposes of publicizing the United Planning Organization's programs, or for any other lawful purpose. In addition, I waive the right to inspect or approve the finished product, including written or electronic copy, wherein my likeness appears.

I hereby hold harmless and release and forever discharge the United Planning Organization from liability for all claims, demands, and causes of action which I or any third party may have in connection with or, by reason of this authorization.

I am 21 years of age and am competent to contract in my own name. I have read this release before signing below and I fully understand the contents, meaning, and impact of this release.

(Signature)

(Date)

(Printed Name)

(Date)

Criminal Background Check – Authorization Form

Disclosure and Authorization Form for Obtaining Consumer Reports for Employment or Volunteer Purposes

DISCLOSURE

In consideration of your employment or volunteer eligibility (or continued employment or volunteer eligibility if you are currently an employee or volunteer) with the United Planning Organization (UPO), UPO may request and rely upon one or more consumer reports or investigative consumer reports about you that UPO obtains from one or more consumer reporting agencies, such as Intellicorp Records, Inc. or any other vendor chosen by UPO to furnish such information.

IntelliCorp Records, Inc. can be contacted by mail at 3000 Auburn Dr., Suite 410, Beachwood, OH 44122; by phone at 888-946-8355; or on its website at www.intellicorp.net.

Explanation of the terms:

A “consumer report” is a written, oral or other communication of any information by a consumer reporting agency bearing on your credit worthiness, credit standing, credit capacity, character, general reputation, personal characteristics, or mode of living which is used or expected to be used or collected in whole or in part for the purpose of serving as a factor in making an employment-related decision about you. Such information may include, for example, credit information, criminal history reports, or driving records.

An “investigative consumer report” is a consumer report in which information on your character, general reputation, personal characteristics, or mode of living is obtained through personal interviews with your prior employers, neighbors, friends, or associates, or with others who may have knowledge concerning any such items of information. In the event that an investigative consumer report is requested about you, you are entitled to additional disclosures regarding the nature and scope of the investigation requested, as well as a written summary of your rights under the Fair Credit Reporting Act (FCRA).

Under the FCRA, before UPO can obtain a consumer report or investigative consumer report about you for employment/volunteer purposes, UPO must have your written authorization. Before UPO takes adverse action on the basis, in whole or in part, of information in that report, you will be provided a copy of that report, the name, address, and telephone number of the consumer reporting agency, and a summary of your rights under the FCRA.

AUTHORIZATION FOR OBTAINING CONSUMER REPORTS FOR EMPLOYMENT OR VOLUNTEER PURPOSES

I have read and understand the foregoing Disclosure, and authorize the United Planning Organization to obtain and rely upon consumer reports or investigative consumer reports concerning me. By my signature below, I authorize UPO to obtain any such reports and to share the information received with any person involved in their decision about me. I understand that this release is signed, free from duress, and with the full knowledge and understanding that any information obtained will be used in assessing my relative fitness for employment or volunteer eligibility with UPO.

I also agree that this Disclosure and Authorization in original, faxed, photocopied, or electronic (including electronically signed) form will be valid for any consumer reports or investigative consumer reports that may be requested about me by or on behalf of the United Planning Organization.

Printed Name

Applicant Signature

Date

Personal Data - Please print the information below:

First Name:	
Middle Name:	
Last Name:	
Other Names Used (including maiden name):	
Current Address (include street, city, state and zip code):	
Addresses for the past seven (7) years (include street, city, state and zip code)	Dates of Residence
Date of Birth:	Social Security Number:
Driver's License # or ID #:	Issuing State:

I have the right to make a request to **IntelliCorp Records, Inc.**, or other vendor used by UPO, upon proper identification, to request the nature and substance of all information in its files on me at the time of my request, including sources of information, and the recipients of any reports on me which **IntelliCorp Records, Inc.**, or other vendor used by UPO, has previously furnished within the two year period preceding my request.

I certify that all elements of the personal data I have provided are true, accurate and complete. I understand and agree that any omission, false statement, misleading statement, or answer made by me will be sufficient grounds for rejection or discharge.

Printed Name

Applicant Signature

Date

Revised: 7/21/17



301 Rhode Island Avenue, NW
Washington, DC 20001
(202) 238-4609

www.upo.org



United Planning Organization

301 Rhode Island Avenue NW

Washington DC 20001

Tel: 202 238 4600

Email: info@upo.org Website: www.upo.org

FOR IMMEDIATE RELEASE: JUNE 2, 2020

Press Contact: Zohar Rom | (202) 812-4001, zrom@upo.org

UPO Sets Board Elections, Seeks Exceptional DC Leaders



WASHINGTON, DC: The Board of Directors of United Planning Organization (“UPO”) announced elections for 4 open seats. These directors will represent low-income residents of the District of Columbia who are striving towards the middle class.

“UPO is in search of *remarkable human beings*,” said Jacqueline Kinlow, chair of UPO’s Board of Directors. “People with compassion, grit, high character, and a unique set of experiences that define them as community leaders. In these exceptionally challenging times, nothing less will do. **If that person is you, please step up. We’d like to welcome you to the UPO Family.**”

UPO’s mission is to **Unite People with Opportunities** so DC residents can become self-sufficient. As the District’s nonprofit Community Action Agency since 1962, UPO’s innovations have changed the lives of whole families for generations.

COMMUNITY ACTION AGENCY FOR WASHINGTON DC

[f](#) [t](#) [i](#) [v](#) [t](#) #IAMUPO

UPO tears down barriers and builds people up by tackling inequity across the city. Its staff changes the system and empowers people to learn new skills, transform their families' lives, and touch the future they've dreamed of.

- UPO runs the city's largest Early Head Start program.
- UPO prepares youth for college and careers.
- UPO helps people manage their money so they can build wealth and keep their homes.
- UPO's job training and placement opens doors to the first job security ever for many of our residents. Then, they become part of the UPO Family for life.

Applications for nominations are due on July 24, 2020. The online application is available at www.upo.org. To pick up a printed application, please visit 301 Rhode Island Avenue, NW, Washington, DC 20001. For more information on UPO's Board of Directors elections, please contact Ayana Bias at (202) 231-7946 or email communityelections@upo.org. UPO community elections will be held on **Tuesday, September 1, 2020**.

The 4 open seats will represent low-income residents striving towards the middle class in Wards 1 and 3 (combined); Wards 2 and 6 (combined); Wards 4 and 5 (combined); and Ward 8B in the District of Columbia. Candidates must live within the wards' prescribed boundaries and be at least 21 years old. To check if you live within these boundaries, please [type in your home address](#); if it's inside the green area, you are eligible.

(If not, then unfortunately you are not eligible. If you're looking for other ways to get involved, please consider volunteering. For more information, please contact Ayana Bias at abias@upo.org)

About United Planning Organization

UPO is a human and community development organization. As the Community Action Agency for Washington, DC, UPO's federally-mandated purpose is to help people lift themselves out of poverty. UPO surveys DC residents to learn community needs and gaps in service delivery, then develops ways to bridge those gaps by Uniting People with Opportunities. Over 400 staff members and 500 volunteers help over 50,000 DC residents each year, with impacts in education, employment, health, housing counseling, and in strengthening families and communities.

UPO has a 21-member governing board: 7 are appointed by senior elected officials in DC (Mayor and Congressional Representative); 7 represent major groups and interests; and 7 are elected by UPO's customers—low-income residents striving towards the middle class.

Appendix 4, Election Notice to Nominating Community Organizations

2011 Letter to Community Members

August 18, 2011

Dear Community Member:

The United Planning Organization (UPO), the Community Action Agency for the District of Columbia, is governed by a tripartite Board of Directors that includes 1/3 “representatives of low-income residents.” Representatives of the poor are secured through a democratic process, allowing community residents to elect individuals from Election Service Areas (ESAs) designated in accordance with the number of citizens in poverty. As in the past, assistance has been solicited from Community Based Organizations (CBOs) in targeted areas to inform the public, regarding upcoming elections and to encourage qualified individuals to apply to become members of the UPO Board of Directors.

A representative of low-income residents is needed for Election Service Areas (ESAs) serving Wards 1 and 3. In accordance with the “Democratic Selection Procedures for the UPO Board of Directors, your organization may elect and designate, “an individual living in DC Voting Precincts 7, 27, 28, 20, 22, 23, 36, 37, 38, 39, 41, 43, or 137,” for consideration. The nominee is required to submit an “**Application for Nomination**” by no-later-than **Monday, September 26, 2011**. If applications for eligible persons are submitted by more than one community based organization, UPO reserves the right to accept the best candidate to serve for the first 3 year term of service. The candidate will be expected to compete for reelection for a second term.

Enclosed for your information, and use are application kits, information and instructions. Your participation is vital in our efforts to empower District of Columbia residents to participate in the governance of the agency charged with the provision of relevant, effective services for the poor.

Please feel free to contact Mrs. Vanessa C. Rawls at 202-238-4734 or vrawls@upo.org for any additional information. We look forward to your participation as we work to serve low-income residents of the District of Columbia. Thank you in advance for your cooperation and assistance.

Sincerely,

Ron Collins, Chair
Nominating, Bylaws & Board Governance Committee
UPO Board of Directors

Appendix 5, 2017 Election Timeline

Activity	Completion Date
Notification of Current Representatives	Thursday, July 27
Notification of Community Residents	Thursday, July 27
Web Page Announcement of Planned Election (COS)	Monday, July 31
Solicitation of Candidates (30 days)	August 1 - August 31
<ul style="list-style-type: none"> • Press release • Letters to partners • Circulation of Application Kit in the Community • Phone calls to stakeholders 	
Secure third party validation partner for election	Thursday, August 19
Deadline for applications	Thursday, August 31
Compliance Division review of applications	Thursday, September 7
Acceptance and validation of candidates	Tuesday, September 21
<ul style="list-style-type: none"> • Criminal background check • NBBG Committee review of candidates and recommend a slate to the Board • Board approval of the slate 	
Slate of Candidates announced and circulated to affected communities	Tuesday, September 26
Identification and preparation of election sites	Monday, October 23
Advertisement of Election (COS)	October 2 – October 24
<ul style="list-style-type: none"> • Web page announcement • Fliers in the community • Slate 	
Election	Tuesday, October 24
Validation of Results	Thursday, November 2
NBBG Committee Accepts and Recommends For Board Action	Thursday, November 9
Board Approval	Thursday, November 16

UNITED PLANNING ORGANIZATION

Community Elections

Election Poll Workers Guide



Tuesday, November 08, 2011
4:00 p.m. to 8:00 p.m.

Table of Contents

Greeting	3
Voting Day	4
Volunteering On Election Day	5
Election Guidelines	6
Voter Instructions	8
Election Supply Checklist	9
Voting Process Diagram	10
Polling Locations	11

GREETINGS ELECTION VOLUNTEER!**THANK YOU FOR AGREEING TO VOLUNTEER FOR THIS
IMPORTANT UPO EVENT**

Without your support, a major project of this type would not be possible. As a volunteer, your dedication and commitment to the election procedures will help to ensure that the election operates as planned. In response, the voters will truly appreciate all of our efforts for making the voting process an enjoyable one.

Our goal is to elect Board Member's who will advocate for the poor and help to improve the conditions that cause poverty in the District of Columbia. Every DC Resident should have an opportunity for a quality life and this can only be accomplished if we have strong families. This election is a step in the right direction, your leadership and hard work will make it a reality,

VOTING DAY

Remember to smile. Your graciousness with voters is an important factor in promoting positive community relations with city residents.

1. Greet all voters
2. Be especially attentive to the handicapped or elderly. Help them with any special needs that they may have. If a voter enters the election site with a service animal do not interfere or make physical contact with the animal.
3. Follow the Election guidelines
4. Give clear directions and accurate information on voting procedures.
5. Stay in your assigned area. The Ward Captain will give you your volunteer assignment.
6. If an emergency arises, contact the Ward Captain immediately. Depending on the nature of the emergency, 911 should be contacted. Notify UPO headquarters of any special circumstances.
7. Monitor the flow of traffic. Do not allow "bottlenecks to occur".
8. Each voter has a "right to privacy". Make sure you preserve it.
9. Thank each voter for participating in the election. Tell them that their vote counts.

Volunteering on Election Day

Site Logistics

1. Please report to your assigned election site by 2:15 p.m. in order to prepare the election room for voters. The election starts at 4:00 p.m. and ends at 8:00 p.m. Adhere to all posted hours. Do not begin or end the election prior to the official scheduled time that has been advertised for the election.
2. Put on your nametag. Wear it at all times.
3. Exert every effort to ensure that the election site is clean and comfortable for voters.
4. Review all election materials and secure all supplies and Election documents for processing. Make sure all items are put in place prior to the start of the election. See Election Supply listing.
5. Post signs showing arrows pointing voters to the election room, bathrooms and exits. All voters should enter and exit the same way to avoid congestion. Hang both indoor and outdoor signage.
6. Water and juice will be provided, please bring any other medicine or snacks that you will need to sustain you during your shift. Do not eat or drink in front of voters, check with your Ward Captain for break assignments or job rotations.
7. Dress for comfort. Wear appropriate clothing and footwear since you will be standing for several hours.
8. If the media comes to the election site, do not make statements or volunteer information. Tell them to see the Ward Captain, he/she will provide the media with a copy of the UPO press statement. All official UPO spokesperson will be on hand to respond to media questions.

UPO ELECTION GUIDELINES

Please note the following mandatory procedures.

- All voters must register to vote by signing in on the UPO Election sign-in sheet. Take the time to make sure that they fill out all areas of the form.
- Identification is required for all voters. No exceptions. Check for residency. It is important to determine their eligibility before they proceed to the next voting checkpoint.
- All residents who reside in the Ward are eligible to vote, but you must verify address.
- Do not give voters your opinion on which candidate should be elected. This is a democratic process, do not influence voters.
- Do not argue or engage in a confrontation with voters. Remember, you are the host/hostess for this event and have the important role of enforcing the election procedures and promoting positive public relations during the event.
- Once eligibility is verified, the voters will be given a regular or provisional ballot and directed to the voting area.
- Persons may vote at any polling location. If a ballot is cast at an alternate site, the voter must use a provisional ballot. These ballots will be cross-checked to prevent duplicate votes.
- Each voter can vote for one candidate only. If a voter makes a mistake, they must give the Ballot Clerk the "spoiled" ballot prior to receiving another Ballot. All spoiled ballots will be stamped or marked "VOID" and placed in a special box marked "SPOILED BALLOT".
- All voters will deposit their completed ballots into the box marked "Ballots". After fulfilling this task, they must exit the voting room. ~Thank them for coming and inform them that the results will be posted on the UPO web (www.upo.org) and at UPO centers. ~

- The voting process will be observed by an independent group of staff, volunteers or a partner agency that also will collect the locked ballot boxes for release to the group or person responsible for counting the ballots. The keys will be maintained at a separate location and will be released only to the counters, that claim the boxes prior to counting.
- Persons must be in line to vote by 8:00pm. Persons coming after 8:00pm will not be allowed to vote.
- Clean up and remove all election materials. Each Ward election will be held at a different location. Return all materials to the Ward Captain. ***Thank the site personnel for allowing us to have the election at their organization.***

Counting The Votes

- All ballots will be counted by a third party accounting firm or independent entity.
- The candidate with the highest number of votes will be nominated to the UPO Board of Directors.

Voter Instructions

How To Vote:

1. Fill in the oval next to your choice with a blue or black pen.
2. If the ballot is marked incorrectly, return to the registration desk for a new ballot.
3. Fold the ballot.
4. Insert into the Ballot Box.

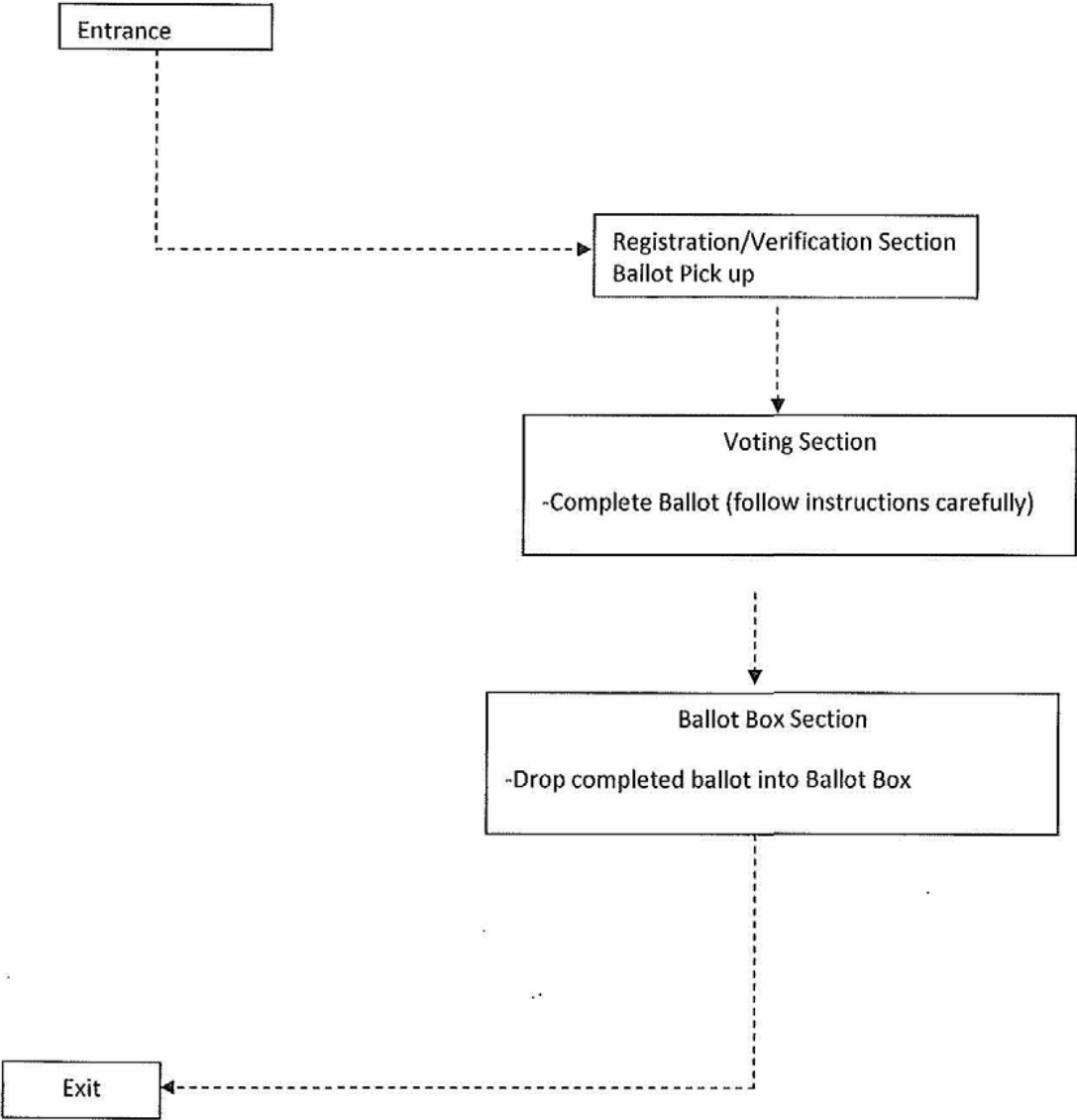
ELECTION SUPPLY CHECKLIST

1. Instructional Manual
2. Markers and paper for preparing signage
3. Copies of all Ward Election Flyers
4. Batch of corresponding Ward flyers - the specific site where you are volunteering
5. Volunteer schedule
6. Registration Forms & Master Street Index Listing
7. Ballot Box
8. Spoiled Ballot Box
9. Ballots for each per site
10. Provisional Ballots For Polling Site
11. Provisional Ballot For Other Wards
12. Other Ward Ballots- 50 each per site
13. "VOID" Stamps
14. Pens
15. Rubber bands
16. Paperclips
17. Writing tablet
18. Arrow Signage
19. UPO Press Statement
20. Refreshments for Volunteers

**United Planning Organization
Community Election for Low-Income Representatives to UPO Board of Directors**

Date: (Insert Date)	Ward (Insert Ward No.)
Polling Location: Insert Address of polling location)	

VOTING PROCESS DIAGRAM



United Planning Organization
Community Elections

Tuesday, November 08, 2011
4:00 p.m. to 8:00 p.m.

Election Polling Places

Polling Site

Ward 4

Fort Stevens Senior Recreation Center
1327 Van Buren Street, NW
Washington, DC 20012
202-541-3753 or -55

Ward 5 (precinct 135)

Mount Bethel Baptist Church
1901 1st Street, NW
Washington, DC 20001
(202) 409-3257
Contact: Pastor Bobby Livingston

Ward 7 (precinct 102)

Dorothy I. Height Public Library
3935 Benning Road, NE.
Washington, DC 20019
(202) 281-2583 Library
Contact: Mr. Martin Burrows (202/281-2598)



UNITED PLANNING ORGANIZATION

Election Committee
301 Rhode Island Avenue, NW
Washington, DC 20001
(202) 238-4600

Appendix 7, 2020 UPO Board Election Flyer



HERE'S YOUR CHANCE TO BECOME A UPO AMBASSADOR:

A vocal champion and supporter of our programs and initiatives in the wider community

UPO tears down barriers and builds people up. Our staff is hands-on, tackling inequity across the city every day. We change the system and empower people to learn new skills, change their families' lives, and touch the future they've dreamed of.

- 】 We run the city's largest Early Head Start program.
- 】 We prepare youth for college and careers.
- 】 We help people manage their money so they can build wealth and keep their homes.
- 】 Our job training and placement opens doors to the first job security these strivers have ever had. And we're never "done" with them. They become part of the UPO Family for life.

UPO BOARD OF DIRECTORS

Join Our Team and Be The Change You Want To See in Your Community

REQUIREMENTS FOR ALL MEMBERS

- 】 Must be a DC resident who's over 21 years old
- 】 Must live within one of the Election Service Areas accepting candidates
- 】 Must be able to complete and pass a background check

COMMITMENT

- 】 Attend Full Board Meetings bi-monthly
- 】 Attend Board Committee Meetings: monthly or bi-monthly
- 】 Participate in at least 2 UPO-sponsored civic engagement events.

AREAS OF EXPERTISE WE NEED

- 】 Fundraising & Resource Development
- 】 Communications & Public Relations
- 】 Advocacy & Grass Root Organizing
- 】 Community Planning & Economic Development
- 】 DC Policy & Research
- 】 Early Learning & Education
- 】 Executive Administration (Finance & Human Resources)
- 】 Legal

BOARD MEMBERS REPRESENT ALL 8 WARDS, THE PUBLIC AND PRIVATE COMMUNITIES

- 】 **1/3** are democratically selected representatives of residents with low incomes, including one designated representative of the UPO Policy Council
- 】 **1/3** are elected public officials or their representatives (1 member designated by DC's Delegate in the US House of Representatives and 6 members designated by DC's Mayor)
- 】 **1/3** are representatives of major groups and interests elected by the UPO Board

WWW.UPO.ORG

Appendix 8, 2020 UPO Board Election Postcard



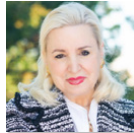
UPO tears down barriers and builds people up. By helping DC residents become self-sufficient, we transform families for generations.

On September 1: text to VOTE for the best representative for YOUR WARD!

Find your in-person voting location and learn about the candidates

WWW.UPO.ORG/COMMUNITYELECTIONS

WARD 1 & 3



Christine Warnke

Text **ESA1** to **41444**

WARD 2 & 6



Rhonda Hamilton



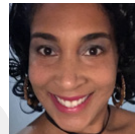
Tamara Phelps

Text **ESA26** to **41444**

WARD 4 & 5



Hadiyah Muhammad



Wendy H. Giles

Text **ESA45** to **41444**

WARD 8B



Chamarcra M. Outlaw



Salim Adofo

Text **ESA8B** to **41444**



Be the **CHANGE** you want
to see in your **COMMUNITY**

JOIN THE UPO BOARD



Find out more at our:

VIRTUAL OPEN HOUSE

Tuesday, June 30 | 6:15 - 7:30PM

Thursday, July 16 | 6:15 - 7:30PM



LIVE on Facebook:
fb.com/UPOinDC



RSVP at communityelections@upo.org
to join the Webex event

You can become the voice of
residents with low incomes
who are striving towards the
middle class.

If you live in Wards 1-6 or
8B, this can be your chance
to make a difference,
helping DC residents
become self-sufficient.

Our team will answer all of your questions.

We appreciate you!

Online Application is now available at: **UPO.ORG/COMMUNITYELECTIONS**