Lobbying 101
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LOBBYING OVERVIEW

Presented to:

Massachusetts Workforce Association

12/12/19 - Salem State University

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Agenda:

- Elevator speech introductions
- Lesson 1: Lobbying vs. Advocacy
- Lesson 2: Relationships & Political Capital
- BREAKOUT SESSION – What relationship-building/political capital activities will I engage in?
- Lesson 3: Integrating Advocacy Into Your Organization
- BREAKOUT SESSION - How will you integrate advocacy this year?
- Lesson 4: Prioritizing Decision-Makers & Deciding on a Strategy
- Questions & Answers

Materials Included:

- Copy of Power Point Presentation
- Advocacy vs. Lobbying Cheat Sheet
- Relationships Worksheet
- Political Capital Worksheet
- Advocacy Integration Plan Worksheet
- Legislative Breakfast/Information Session Cheat Sheet
- Strategy Worksheet
- Lobbying Tracking Spreadsheet (sent electronically)

To learn about in-person or online advocacy training for board members, lobbying training for organization leaders, or other tailored political engagement programs email info@learntolobby.com.

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"Lobbying Overview"

A *Learn to Lobby* training of

Nexus Werx LLC

Presented by:

Stefanie Coxe, Principal

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LEARN TO LOBBY

- 15 years of political experience
  - Aide to 2 State Representatives and a U.S. Congressman
  - Political campaign manager and consultant
- Train rather than lobby
- Founded Nexus Werx LLC and its *Learn to Lobby* programs:
  - Lobbying 101
  - Effective Activism 101
  - Community Monitoring Program

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WELCOME & INTRODUCTIONS
"60-Second Elevator Speech"

- Name
- Organization
- What workforce boards/career centers do that's important and why lawmakers should care

(Why, how, what)

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A TALE OF TWO ORGANIZATIONS

Organization A:

- Limited contact/board not involved
- Lawmakers co-sponsor but don't privately lead
- Staff is too busy
- 1-2 x/yr
- One-sided

Organization B:

- Has the right relationships and political capital
- Lawmaker hears from significant number of *engaged* constituents & takes extra steps
- Communicates w/ MWA; able to take further

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BECOME ORGANIZATION B

- You need to know who you need to know
- Your board members need to build relationships with those people (and to do that, you need to create a culture of engagement)
- Together, you need political capital
- Then you can turn them into *advocates*

LESSON 1:
What is Advocacy vs. Lobbying?

The information you are about to receive is educational only. Please consult an attorney for legal advice and an accountant for IRS compliance advice.

WHAT IS LOBBYING?

- Asking public decision-makers to support/oppose *specific* issues
- Asking members/clients to contact decision-makers on those issues
- Back-end work leading up to asking decision-makers

Specific Asks

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DEFINITIONS

Advocacy is embracing and promoting a position and point of view on an issue. Advocacy is a broad and ongoing effort to advance an issue in civic engagement and legislative cycles. While sometimes a group has one issue to champion in a legislative arena, the real long-term work of building policies involves a cycle of advocacy in which organizations engage in policy efforts, building support for change.

LOBBYING REGISTRATION

State registration as a lobbyist isn't required if a person:

- "(i) engages in legislative lobbying for not more than 25 hours during any reporting period; and (ii) receives less than $2,500 during any reporting period for legislative lobbying".

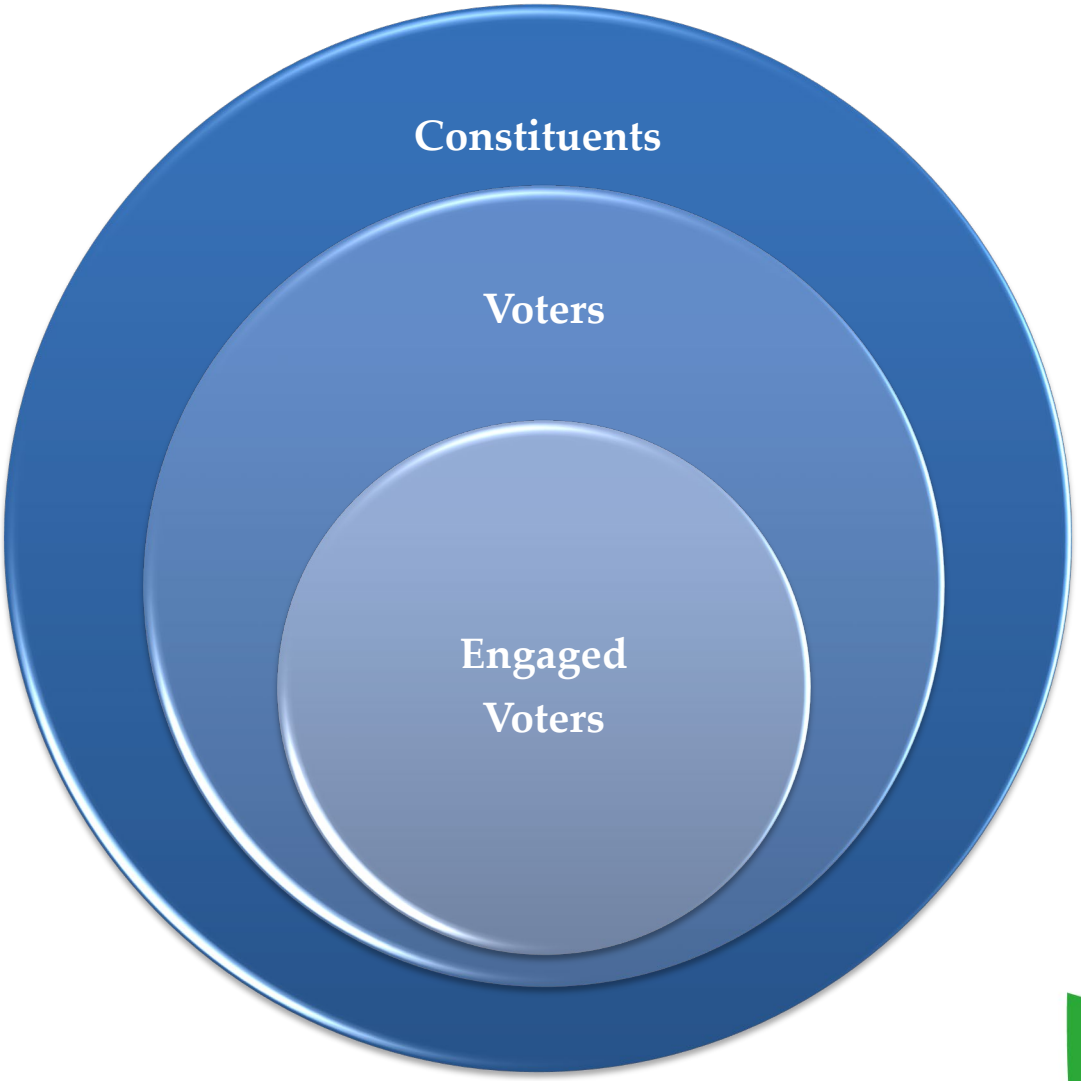
Federal registration isn't required if:

- "total expenses for lobbying activities do not exceed and are not expected to exceed $13,000 during a quarterly period."

LESSON 2:
Relationships & Political Capital

Rising to the Top of the Advocacy Pile

WHO DO POLS LISTEN TO?



TYPES OF BOSSES

The Tyrant

The Absent Boss

The Supportive Boss

Engaged Bosses

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Key Tip

Try to cultivate relationships *before* you need something.

PRIORITIZING RELATIONSHIPS

Out of Your Delegation:

- Who is in "Leadership"?
- Who is on Ways & Means or Labor & Workforce Development; or
- Who has a natural interest in workforce development?

WHERE TO GO FOR RELATIONSHIP-BUILDING

- Official Functions
  - Town Meeting or Hearings
  - Office Hours
- Large Community Events
  - Ground-breaking ceremonies
  - Major community announcements
  - Anywhere a large number of voters will be present

RELATIONSHIP-BUILDING

- Just saying ‘hi’ when you don’t need anything

Photo by Aaron Burden on Unsplash

POLITICAL CURRENCY

POLITICAL CAPITAL

- Relationship is transactional
- Your capital goes up when you help them
- Your capital goes down when it's one-sided

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BUILDING POLITICAL CAPITAL

Give pols props

- Award
- Thanks
- Letter to Editor

Be helpful…by helping spread the word

Key Tip

If you or a member does something helpful, make sure the politician's team knows.

ADVOCACY BREAKOUT:

In small groups:

- Using the "Relationships Worksheet" and the "Political Capital Worksheet", evaluate what you'll do to build political capital with the elected officials you need.

- Help each other out.

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LESSON 3:
Integrating Advocacy into Your Organization

WHEN/HOW TO START

- Lobbying is an investment
- Plan in 2 year increments
- Learn Your Deadlines and Plan backwards
- Identify who'll you'll need
- Start Tracking Your Time
- Augment Tonja's work

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LOBBYING FUNNEL

- Broad Issues your organization wants to influence
- What you can educate decision-makers on
- What (specifically) you will lobby decision-makers on

*Use your worksheet to jot down ideas!

INTEGRATE YOUR COMMUNICATIONS

EVENTS YOU CAN HOST

- Legislative "walk-thru" or Breakfast
  - Short (45 min), actually educational
  - Include or reference their constituents/employers
  - Good food (skip the muffins)
- Host an "information session"
  - Either at the State House or in the District
  - On a specific topic
  - Do follow-up

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EVENTS

- Invite board members/supporters to a Legislative Breakfast or walk-thru
  - Elevator speeches
  - Thank you follow-up calls/emails

Photo by Clay Banks on Unsplash

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EVENTS

- Invite board members/supporters to an issue forum
  - Have them write what town they are from on their nametag
  - Make sure they meet *their* elected official
  - Get them to take a picture and promote on social media (share hashtag & handles)

ASK THEM TO STEP IT UP

- Sign up for e-newsletter/follow on social media
- Just say “hello”

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Advocacy Action Assignment

In small groups and using your Advocacy Integration Checklist:

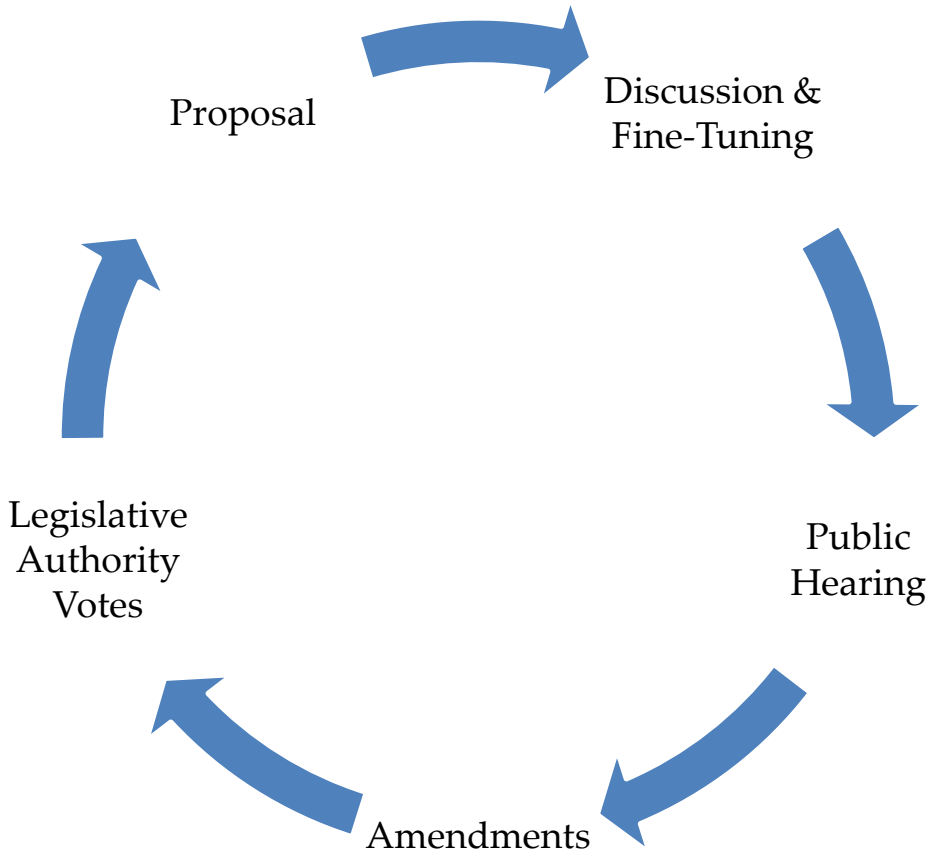
- Identify 2-3 activities you will undertake in the next 3-6 months to create a culture of political engagement with your members.

- Brainstorm solutions to obstacles you might face.

LESSON 4:

Prioritizing Decision-Makers & Deciding on a Strategy

DECISION-MAKING



DECISION-MAKERS

- Speaker
- Minority Leader
- Chairman
- Ranking Member
- Committee Members

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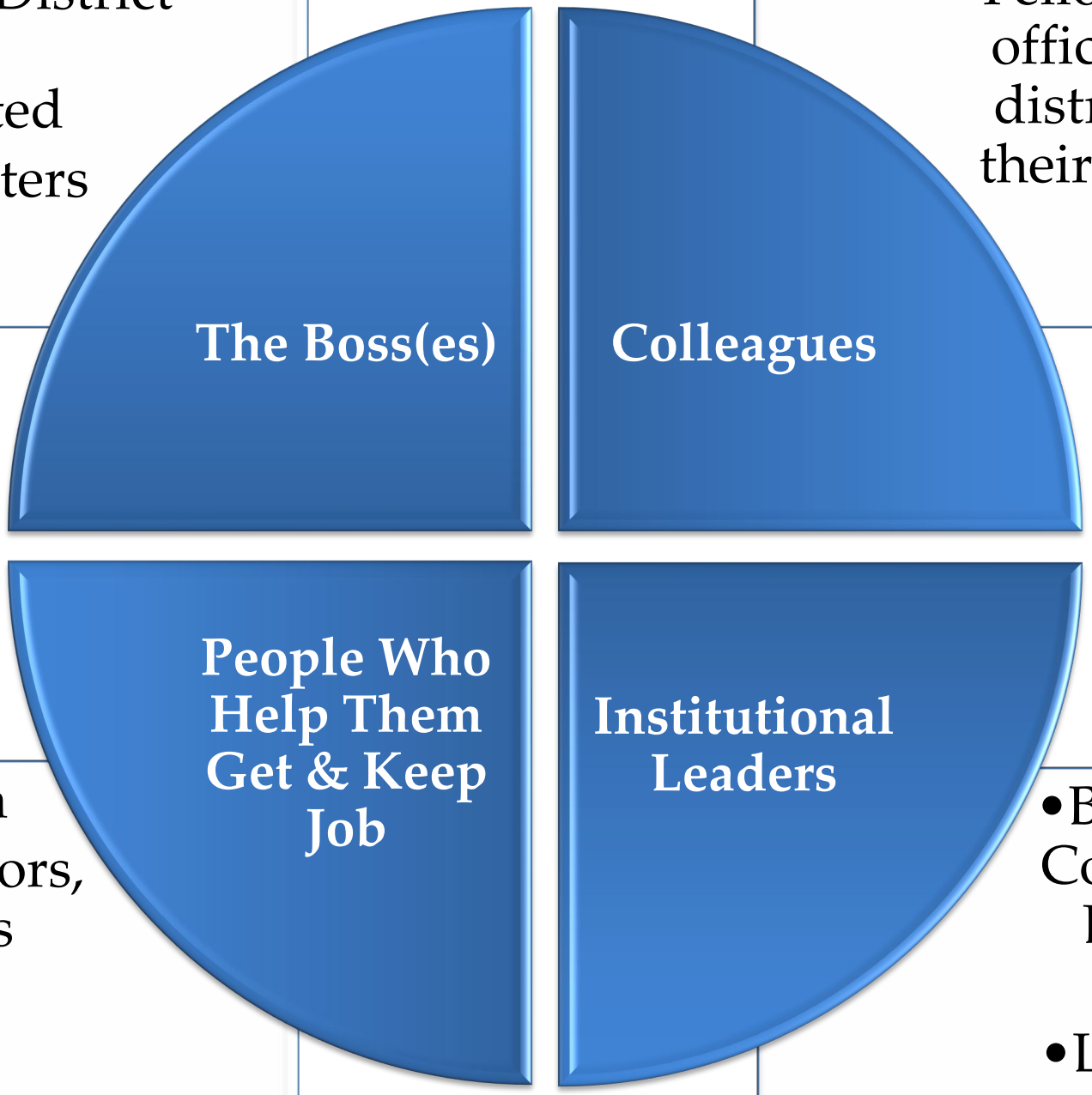

- Voters in District Currently Represented
- Future voters

- Fellow elected officials in the district and in their Chamber

- Campaign
- Staff, Donors, Volunteers
- Aides

- Business & Community Leaders in District
- Legislative Leaders

DECISION-MAKER

- Ask your elected officials to contact the decision-maker

And/or:

- Determine connections you have to people in their sphere of influence
- Consider their "WIIFM"
- Use framing

*Can be used for your elected official as well

SPECIFIC ASKS

- Sponsor, co-sponsor, or vote in favor (or against) legislation or budget request
- Write/or sign onto a letter to the Committee chairman and Ranking member
- Personally speak to the decision maker
- Sign onto an amendment
- Write letter of support for a grant application

HOMEWORK

What does it (bill/budget item) do?

- Brief – 1-2 sentences
- Problem it solves
- Gain it creates
- Why it's important

HOMEWORK

- Your elected official's history on the issue
- Party leadership's position
- Where the public is

FRAMING

Benefiting/harming other bosses

- Local statistics
- Local personal stories

WIIFM

- How will it benefit them?

What's new/different?

POWER MAP

MoveOn.ORG
DEMOCRACY IN ACTION

MASSCREATIVE
Advocate Creativity.

TOXICS ACTION CENTER

CORPORATE ACCOUNTABILITY INTERNATIONAL

STRATEGY: Your theory on why you think you'll get what you want

	😄 Decision-maker is with you	Decision-maker isn't with you/unknown
:D Public is with you	HERO	PRESSURE
:(Public isn't with you/unknown	COVER	MERITS

Power Map Credit: Matt Wilson

BECOME ORGANIZATION B

After you've implemented this plan:

- Board Members will be more responsive
- They'll do more
- Better outcomes

- You need to know who you need to know
- Your supporters need to build relationships with those people (and to do that, you need to create a culture of engagement)
- Together, you need political capital
- Then you can turn them into *advocates*

QUESTIONS & ANSWERS

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Advocacy vs. Lobbying Cheat Sheet*

#1 : Always OKAY – not lobbying	#2 : Okay for 501c3 without Registering to Lobby (as long as all lobbying activities are cumulatively less than 25 hours per year)**	#3 : Okay for 501c3 to Lobby but requires registration, tracking, & reporting if in excess of 25 hours per year**	#4 : NEVER OKAY (jeopardize 501c3 status)
Research on issue	Communication with elected officials	Communication with elected officials	Give money to political candidates
Holding a non-partisan forum	Calls to action by org to membership/public on issues	Calls to action by org to membership/public on issues	Endorse political candidates
Making a statement that org believes XYZ.	Trying to influence policy	Trying to influence policy	
Example 1: Child Care Vouchers Send an e-blast with information about the state's line item for Child Care Vouchers, inform people that there will be a vote in the Legislature, state that child care is an important issue for org members Make a public statement that org supports local child care non-profit's mission	Staff reaches out directly to lawmakers asking them to support funding. Send an e-blast to members asking them to call their elected officials in support of the funding. Make a public statement that org supports an affiliate non-profit's campaign for ballot measure #23	Spend more than 25 hours a year (combined with other issues): calling elected officials and asking for the increased funding, asking to call their elected officials, campaigning for the vote, ask for an earmark for the funding, etc.	Hold a fundraiser for a candidate that supports line items for increased child care vouchers

*Disclaimer: This information is educational only and should not be construed as legal advice.

**In Massachusetts. For other states, consult your Secretary of State or other lobbying regulatory agency.

Example 2: Traffic proposal Host a forum debating both sides of the traffic issue. Make a public statement that org does or does not support the traffic mitigation plan	Host a forum supporting only the pro-traffic mitigation plan. Ask members to vote yes on Ballot X to support the town's expenditure on plan.	Spend more than 25 hours a year (combined with other issues): Host a forum supporting only the pro-trafic mitigation plan. Ask members to vote yes on Ballot X to support the town's expenditure on plan.	Make a public statement that org endorses Joe Smith's position on traffic (running for mayor).
Example 3: Small Business Development Promote the Entrepreneur's Weekend	Encourage membership to go to State House with the Chamber of Commerce	Have org staff go to State House with the Chamber of Commerce (difference is more hours)	Non-profit pays for Exec. Dir. to attend a dinner that is a political fundraiser for state senator (director can only pay out of her own pocket)

Links to important laws:

IRS – for 501c3s
Use of Federal Funds – For federal grant recipients
State Restrictions
Gifts – Federal & MA State Laws

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RELATIONSHIPS WORKSHEET

What are 3 major advocacy "buckets" for my organization (ex. State Certification Policy; Federal Grant Funding, Local Zoning Regulations)?

_____
_____
_____

Based on those "buckets", which politicians will I need most? (State, federal, local) Consider this when determining: *What relationships will I nurture?*

_____
_____
_____

What relationship-building activities will I engage in:

- ☐ Getting to know them
  - Get on their email lists (office and campaign)
  - Attend an official function
  - Attend a fundraiser
  - Attend a community event where they will be present
  - Popping by to say, 'hello'

- ☐ Being helpful
  - Speak up when they're getting heat
  - Write a letter to the editor
  - Praise them on social media

- ☐ Thanking them
  - Calling their office or writing a letter or email
  - Social media

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POLITICAL CAPITAL WORKSHEET

Using the work you did on the Relationships Worksheet, identify the lawmakers you'll need.

1) Lawmaker: _____

What have I asked in the past?

_____

_____

_____

What have I done for them lately?

_____

_____

_____

What is my political capital with them? (Scale of -5 to 5) _____

2) Lawmaker: _____

What have I asked in the past?

_____

_____

_____

What have I done for them lately?

_____

_____

_____

What is my political capital with them? (Scale of -5 to 5) _____

3) Lawmaker: _____

What have I asked in the past?

_____

_____

_____

What have I done for them lately?

_____

_____

_____

What is my political capital with them? (Scale of -5 to 5) _____

4) Lawmaker: _____

What have I asked in the past?

_____

_____

_____

What have I done for them lately?

_____

_____

_____

What is my political capital with them? (Scale of -5 to 5) _____

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ADVOCACY INTEGRATION CHECKLIST

How will I build advocacy into my organizational goals?

- ☐ What are (non-lobbying) subjects I can educate lawmakers on?
  _____
  _____
  _____

- ☐ What are my legislative goals?
  - Annual _____
  - 2 years out _____
  - 4 years out _____

- ☐ When will I make time to plan out a strategy and work on implementation?
  _____
  _____

How will I create a culture of political engagement with my board members and business leaders?

- ☐ Start including Legislative/Regulatory/Budgetary updates in e-newsletter & social media
  - When applicable, mention what area elected officials are doing on the issue
  - Include a regular "who are my elected officials" link

- ☐ Invite them to a Legislative Breakfast or walk-thru
  - Have them prepare a 30 second "elevator speech" (name, where in the district they are from, and how the organization has made a difference in their lives)
  - Have them follow-up with a phone call or email thanking their legislators for attending

- ☐ Invite them to an Issues Forum
  - Have them write down what town they are from on their name tags
  - Make sure they meet their legislator
  - Get them to take a photo and post, tagging the non-profit, the elected official, and using event hashtag

- ☐ On National Voter Registration Day, have forms and e-alerts ready

- ☐ Ask them to get to know their elected officials better
  - Get on their email lists (office and campaign)
  - Attend an official function (and say 'hello')

What political capital-building activities will I do and/or ask my members to engage in:

- ☐ Being helpful
  - Write a letter to the editor
  - Praise them on social media

- ☐ Thanking them
  - Calling their office or writing a letter or email
  - Social media

How will I ease my volunteers/members/supporters into the role of advocates?

This section crosses over into Lobbying. Before I do this, I will educate myself on the state/federal rules around lobbying.

- ☐ Have an advocacy info session & training
  - Ask them to commit to one phone call per year
  - Provide them with talking points
  - Make sure they are calling *their* legislator

- ☐ Hold "phone bank" parties
  - Create talking points and a system for logging the results of their calls
  - Let them know the outcome of their advocacy
  - Ask them to thank their elected officials

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INFORMATION SESSION/ LEGISLATIVE BREAKFAST CHEAT SHEET

Planning:

- ☐ Work with elected officials' staff to determine the best date before scheduling. For Legislative Breakfasts, Fridays are usually "in-district" days.
- ☐ Send formal invitations and follow-up to confirm attendance.
- ☐ When they RSVP yes, tag them in social media saying your members are excited to meet with them at the event.
- ☐ Send reminder emails 1 week out and 2 days out.

Who are your co-hosts? These may be other organizations or, if it's an information session at the State House, it's being hosted by one or more elected officials.

- ☐ List them on the program
- ☐ Recognize them at the beginning
- ☐ Include them in any media advisories you send out

What is your goal for today? Get specific: Do you want decision-makers to have a better understanding of your mission? Do you want your members to get to know their lawmakers? Do you want to persuade them of a specific policy goal?

What is on your handout/one-pager? Use the answer to the last question to design this.

Keep track. Write down which lawmakers attend and ask staffers to sign a sign-in sheet. Take photos.

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Agenda:

- Introductions/Recognition of whomever helped you set up the meeting (3 min)
- 30,000 foot overview – what your organization is and what you want to talk to them about (30 seconds)
- Who you are (30 seconds)
- Rep/Sen co-host speaks about why organization is important (3 min)
- General talk (5 minutes)
    - Stick to talking points
    - Make sure attendees have the handout/one-pager
    - At the end, incorporate the ask
- Surrogate talk (2 min each)
- Q&A (15 min) – Be prepared for the elected to talk; they want to show they understand and care

Follow-up:

- ☐ Send thank yous to those who attend. *Bonus: Ask your supporters to call and thank them personally.
- ☐ Tag those who attended in photos and posts on social media thanking them for coming.
- ☐ Send "sorry we missed you" notes to those who didn't along with a copy of the one-pager.
- ☐ Send out a press release about the event with a photo to local media (that day).

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STRATEGY WORKSHEET

1. **Identify your specific policy issue** _____

Bill/Amendment Number _____ Bill Name _____

_____

Who is the sponsor? _____

What will it do? _____

_____

Why is it important? _____

_____

2. **Determine who the decision-maker is** (Speaker, Chairman of a Committee, etc.)

_____

3. **Come up with a specific ask** of your lawmaker (co-sponsor, contact Committee chair or Ranking member, sign onto letter, vote for/against, etc.)

_____

4. **Do your homework**

What, if any, position or history does your elected official have on the specific issue?

_____

What is his/her party leader's position on the issue?

_____

Where is the public on the issue (particularly in the elected official's district)?

_____

5. **Frame the ask** using local stats and stories

How and how many people in the district will be impacted by this issue?

What story – either yours or another constituent's – can you use to illustrate the importance of the issue?

6. **Use the power map** to decide on your strategy

STRATEGY: Your theory on why you think you'll get what you want

	☺ Decision-maker is with you	Decision-maker isn't with you/unknown
:D Public is with you	HERO	PRESSURE
:(Public isn't with you/unknown	COVER	MERITS

Power Map Credit: Matt Wilson

My Strategy (Hero, Cover, Pressure, Merits):

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