

Managing Your Outside Lobbyist

Best Practices for Building an Effective Advocacy Partnership

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Tonight's Topics

- Understanding different lobbying models
- Hiring the right lobbyist
- Building an effective partnership
- Creating a meaningful scope of work
- Developing a shared advocacy agenda
- Measuring success

The Biggest Misconception



Associations think, "we hired a lobbyist, so advocacy is taken care of."

Reality

A lobbyist is only as successful as the partnership you build with them.



What is a Lobbyist?

- A lobbyist is a professional who influences public policy by building relationships with policymakers, providing expertise on legislation and regulations, and advocating on behalf of an organization or cause.
- Lobbyists help organizations:
 - navigate the legislative process
 - develop advocacy strategies
 - monitor policy developments
 - connect decision-makers with the people and information they need to make informed decisions.

Two Kinds of Lobbyists

IN-HOUSE LOBBYIST

Your Staff. Your Mission. Every Day.



CONTRACT LOBBYIST

Specialized Expertise. Strategic Impact.



In-House Lobbyist

**Typically, SPTA ED,
DPA, or Members of
Legislative
Committee**

Pros

- **Often a psychologist with subject-matter expertise and professional credibility.**
- Deep understanding of the SPTA's mission, culture, and strategic priorities.
- Strong institutional knowledge and historical context.
- Highly accessible and responsive to leadership and members.
- **Established relationships with members and volunteers.**
- **Better positioned to identify and mobilize grassroots advocates.**
- Advocacy efforts remain closely aligned with the association's goals and values.
- **Lower risk of competing priorities from representing multiple clients.**
- May be more cost-effective if SPTA is pressed financially

In-House Lobbyist

**Typically, SPTA ED,
DPA, or Members of
Legislative
Committee**

Cons

- Frequently serves in the role on a part-time basis, limiting capacity.
- **May have limited time for relationship-building with legislators during busy legislative sessions.**
- **May lack the lobbying experience or political network of a seasoned contract lobbyist.**
- Administrative and operational responsibilities can compete with advocacy work.
- May have less capacity to monitor legislation and engage daily at the state capitol.
- **Success can be vulnerable to staff or volunteer turnover.**

Contract Lobbyist

**Typically, an
individual or firm**

Pros

- **Professional lobbying expertise and knowledge of the legislative and regulatory process.**
- Established relationships with legislators, agency officials, and key stakeholders.
- **Dedicated presence at the state capitol during the legislative session.**
- **Ability to monitor legislation, identify emerging issues, and respond quickly.**
- Experience developing and executing successful advocacy strategies across a variety of policy issues.
- partners and other advocacy organizations.
- Offers additional capacity during high-volume legislative sessions.
- Can provide strategic guidance on messaging, timing, and political feasibility.

Contract Lobbyist

Typically, an individual or firm

Cons

- Often represents multiple clients, resulting in competing priorities.
- **Will have less familiarity with psychology, behavioral health, or the unique needs of the profession.**
- **Requires ongoing communication and direction to remain aligned with the SPTA's priorities.**
- Typically less integrated into the association's culture, governance, and membership.
- Can become the public face of advocacy if roles and expectations are not clearly defined.
- May focus on direct lobbying while underutilizing grassroots advocacy unless specifically included in the scope of work.
- Success depends heavily on clearly defined expectations, performance metrics, and regular accountability.
- **Can be a significant financial investment, particularly for smaller SPTAs.**

Choosing the Right Lobbying Model for Your STPA

Service Model	Primary Role
In-House Lobbyist(s)	Organization staff serve as the primary lobbyists, leading advocacy, relationship-building, and strategy.
Tracking & Strategic Advisor Contract Lobbyist	Lobbyist monitors legislation, provides policy analysis, and advises strategy while the association conducts most advocacy.
Boots-on-the-Ground Contract Lobbyist	External lobbyist or firm leads monitors legislation, relationship building, and day-to-day lobbying.
Hybrid (Recommended)	Contract lobbyist provides strategic guidance, legislative tracking, and conducts key lobbying while psychologists and association leaders actively participate in meetings and grassroots advocacy.

Do We Need a Contract Lobbyist?

Before hiring a lobbyist, the SPTA should ask itself:

- What are we trying to accomplish? Do we have a clear advocacy agenda?
- Do we have the internal capacity? Staff, volunteers, time, and expertise.
- Can we effectively mobilize our members?
- What services do we actually need? Monitoring, strategy, lobbying, coalition building, grassroots support?
- Does hiring a lobbyist fit our budget and provide a strong return on investment?
- Would another model (in-house) better meet our needs?

Hiring the Right Lobbyist

Ask me for sample interview questions!

A strong lobbying partner should have the following qualities:

- Well-established relationships with legislators, regulators, and key policymakers
- A commitment to a grassroots advocacy philosophy that empowers members to be the face of the organization's advocacy
- A willingness to include psychologists in meetings with policymakers whenever appropriate
- Experience coaching and preparing members for advocacy, including legislative days, in-district meetings, and other constituent engagement opportunities
- A strong understanding of membership organizations and how to leverage member engagement to advance policy goals
- A demonstrated track record of legislative and regulatory success
 - Ask: What was your last legislative win?

Managing Your Lobbyist:

Key Takeaway

The most successful lobbyist relationships are true partnerships.

The lobbyist provides political expertise and access; the SPTA provides subject-matter expertise, grassroots advocates, and long-term relationships.

Together, they create a stronger advocacy program than either could alone.

Managing Your Lobbyist:

Best Practices

- **Set clear expectations** with a written scope of work.
- **Communicate regularly** through scheduled check-ins and strategy meetings.
- **Develop your advocacy agenda together** and adjust as priorities evolve.
- **Keep psychologists as the face of advocacy**—your lobbyist should open doors, not replace member advocates.
- **Measure performance** using agreed-upon metrics and outcomes.
- **Seek strategic advice**, not just legislative updates.
- **Conduct regular performance reviews** and refine expectations as needed.

Sample Scope of Work

Basic:

- Legislative Tracking
- Weekly Reports during legislative session
- Bill Analysis
- Factsheet development/review
- Document development/review (like testimony)
- Lobbying Meetings
- Advocacy Day Support
- Board Presentations
- Training Advocates

More Advanced:

- Everything under “basic” plus...
- Legislative Drafting
- Bill Introduction

Developing Your Advocacy Agenda with Your Lobbyist

Your advocacy agenda should be co-developed by the SPTA and your lobbyist—combining the profession's priorities with political expertise to create a strategic, achievable plan.

Developing Your Advocacy Agenda with Your Lobbyist

1. **Start with your mission** – Align advocacy priorities with your strategic plan.
2. **Assess the landscape** – Review legislative trends, opportunities, and challenges.
3. **Gather member input** – Engage your advocacy committee, members, and key stakeholders. Send survey.
4. **Partner with your lobbyist** – Evaluate political feasibility, timing, and strategy together.
5. **Prioritize issues** – Focus on high-impact, achievable goals.
6. **Develop an action plan** – Define goals, roles, timelines, and success metrics.
7. **Review and adapt** – Revisit the agenda regularly as the legislative environment evolves.

Measuring Success

Define these metrics at the start of the contract and review progress regularly.

Successful lobbyists are evaluated not only on legislative outcomes but also on **the quality of their strategy, relationships, communication, and partnership with the association.**

Sample SMART Metrics for Lobbyist Performance (Annual)

- **20+ legislative or agency meetings** annually with priority policymakers.
- **Weekly legislative reports or meetings** during session with recommended actions.
- **Quarterly strategic briefings** to leadership.
- **Annual advocacy agenda** completed before the legislative session.
- **3+ grassroots advocacy activities** supported each year, including Hill Day
- **80% of legislative meetings** include an SPTA member or psychologist.
- **1-business-day response time** during session.
- **Monthly written activity reports** with measurable progress.

Measuring Success:

Long-Term

- **Advances the SPTA's advocacy agenda**
 - GETS BILLS INTRODUCED! GETS LAWS ENACTED!
- **Builds lasting relationships** with legislators and agencies
- **Strengthens grassroots advocacy** and member engagement
- **Develops legislative champions** for psychology
- **Enhances the SPTA's reputation** as a trusted policy resource
- **Provides strategic insight** that positions the SPTA for long-term success

Top 10 Mistakes in Managing a Lobbyist

1. No clear scope of work or expectations
2. Treating the lobbyist as a vendor—not a strategic partner
3. Expecting the lobbyist to do all the advocacy
4. Allowing poor communication and infrequent check-ins from lobbyist
5. Measuring success only by legislative wins
6. Micromanaging instead of trusting their expertise
7. Failing to establish accountability and performance metrics
8. Neglecting grassroots advocacy and member engagement
9. Waiting until the legislative session to engage
10. Underutilizing the lobbyist's strategic advice

Final Reminders

- ✓The lobbyist provides political expertise and access; the association provides subject-matter expertise, grassroots advocates, and long-term relationships.
- ✓The lobbyist should open doors, provide strategic guidance, and facilitate meetings—but members should be the faces and voices of the profession whenever possible.
- ✓This approach builds long-term relationships with policymakers and strengthens the association's political visibility

Discussion / Questions

