NATIONAL INSTITUTE FOR
LOBBYING & ETHICS

# Professional Public Policy Certificate Program (PPC)

The National Institute for Lobbying & Ethics Public-Policy Certificate program is designed to provide lobbyists, governmental affairs, grassroots, social media, public relations, and corporate/association professionals at all levels, the necessary professional education they need to keep pace with an ever changing profession. Over the past 15 years we have seen a dramatic change in how lobbying is done at all levels. We have seen changes in traditional lobbying activities to include new methods using innovative technology. These changes along with the regulatory requirements can be challenging, and that is why getting your Professional Public Policy Certificate (PPC) is critical.

Our PPC program is not just for entry level lobbyists and governmental affairs professionals, but is a program professionals at all levels can benefit from. We understand that time is valuable today and you may not think you have time to commit to receiving your PPC. We assure you these classes are designed around the busy professional's schedule.

**Certificate Structure:**

A. Courses would combine classroom style, guest speaker, and online webinar sessions.

B. To receive a Lobbying & Ethics Public-Policy Professional Certificate (PPC) participants will have to complete 24 credits of course work. (12 classes)

   a. Required Courses: Lobbying Ethics, House & Senate Procedures, Avoiding Conflicts of Interest, Political Action Committee's & Campaign Finance Rules& Regulations
   b. Electives: LDA & FARA, Appropriations & Budget Process, Drafting Legislation, State Lobbying, Communications, Online Advocacy: Using new Technology, Grassroots Lobbying & Coalition building, Developing Fly-In Program, Aligning Advocacy & Communication Functions, Integrating new technologies with grassroots & Lobbying Campaigns, PAC Fundraising, Corporate Lobbying, Association Lobbying

C. To maintain your designation you will need to take 2 credits every year.

D. Courses will be a mix of required core sessions and electives.

E. Courses would be scheduled in the morning or late afternoons. The preferable days of the week would be Mondays or Fridays. These two days work around the congressional calendar.

F. Each course would range from 1 ½ -3 hours in length. We believe this time allotment allows us to provide in-depth training while ensuring participants can get back to their jobs. This PPC program looks to balance the need for continuing education and your busy and demanding work schedule.

**G. Cost: $135 per course (NILE Members) $225 (Non-Member) or $1,400 for the complete PPC.**

At the completion of the **4 required courses and choice of 8 electives**, participants will receive their Public Policy Certificate(PPC) credentials, which is recognized by professional lobbyists and government affairs professionals as a must have designation. This program is important at all levels and stages of your professional career. Advocating at all levels will continue to change and without your willingness to adapt you will be left behind.

Upon receiving your PPC credentials you will need to complete one course every year to keep current and in good standing. New courses will be added throughout the year for those who have their PPC and are looking to keep in good standing.

# Course Catalog

## Required Courses

### 1. Lobbying Ethics

While the negative perception of lobbyists is highlighted by the media, public and politicians, it certainly could not exist without individuals who choose to act unethically within the lobbying profession. A major ethical issue that lobbyists face is in their mode of communicating their message. When people write and otherwise communicate, they are engaging in an act of power. This comes in the form of efforts to inform, persuade, or entertain.

Exercising such power is the main task of the lobbying profession, but it is not an unethical task. Unethical conduct comes into play when those lobbyists use their power in such a way as to dominate other points of view. Lobbyists must be sure that their method of informing and persuading legislatures does not dominate other points of view or prevents legislatures from acting on other choices.

10340 Democracy Lane Suite 300 Fairfax, VA 22030
P: (703) 383-1330 F: (703) 383-1332 E: nsmith@mwcapitol.com W: www.lobbyinginstitute.com

Lobbyists understand that the advocacy they practice is part of the democratic system. They act as the voice for others. As a result, they have a profound respect for the democratic system and it is very rare to find a lobbyist that chooses to dominate the voices of others.

In this course you will discuss:

- Case studies on real life examples of lobbyists crossing the line of ethical and unethical behavior.
- Where is that ethical line drawn when it comes to the gift ban rules and the "friendship" exemption?
- As a former staffer or member of Congress, where is the line drawn between lobbying and advising clients during your "cooling off period".
- Defining the rules when it comes to arranging travel for members of Congress and their staff.
- Is it unethical to represent both sides of an issue: Real Life Case Study?
- The ethics in handling a member of Congress' PAC while at the same time lobbying that member on behalf of your clients.
- The ethics of breaking the gift ban when it comes to taking staffers out for lunch over the allowable limit.

**2. Senate &House Procedures**

Before one can call himself or herself a lobbyist, they must first know the rules and procedures that govern the House of Representatives and the U.S. Senate. The two chambers operate in distinctly different ways

Attendees will learn:

- Sources of legislation.
- Forms of congressional action.
- What it means for a committee to consider your bill.
- How bills are reported.
- The rules governing legislative oversight by standing committee.
- How to obtain consideration of your measure.
- What the rules are governing consideration and debate.

- How final action is taken on an amended bill
- What is meant by enrollment of a bill?

- The types of presidential action.

**3. Avoiding Conflicts of Interest**

- Defining Today's Conflicts of Interest
- Real Case Studies of Conflicts of Interest Using the Jack Abramoff Case as Benchmark
- How To Avoid Client Conflicts
- How To Avoid Professional Conflicts
- Relationships with Clients, Members of Congress, Congressional Staff, and Agency Personnel
- Accepting gifts and entertainment
- Duty of loyalty
- Outside activities
- Financial interests
- Reporting conflict-of-interest violations

**4. Political Action Committees and Campaign Finance Laws**

This course will provide attendees with all the rules and regulations governing Political Action Committees. In addition to learning about the do's and don'ts of PAC's, you will learn the intricacies of campaign law. In the wake of the BCRA and recent Supreme Court rulings, mounting an effective campaign while meeting increasingly complex legal and regulatory requirements has become more challenging than ever.

That's why you won't want to miss "Gearing Up for a Whole New Ballgame," an in-depth look at key changes and their implications for the current campaign cycle presented by experts from the FEC, leading lobbying firms and political consultants. This course brings together experts to provide you with a fast-moving program of insight and information on critical campaign issues.

Attendees will learn:

- What PAC's are?
- The rules and regulations governing PAC's.

- Differences between State, Federal, Corporate, Association, Labor PAC's and the requirements governing them.
- How to stay in compliance with the FEC.
- How to file the forms correctly with the FEC.
- The tricks of the trade on how to make your PAC a success.
- Implications of the Supreme Court Ruling.
- FEC Perspective on Compliance.
- Leadership PACs and The Role They Play.
- 527 Organizations under the New Rules.
- Practical Application: How to Make BCRA Work for You.

## Elective Courses

### 5. Lobbying Disclosure Act and FARA Requirements

Before one can begin lobbying they need to know the rules and regulations. This course is designed to help government affairs professionals at all levels better understand the role of a lobbyist and the rules and regulations that govern their activity.

Government affairs professionals representing foreign clients are required to register with the Federal government as Foreign Agents. These individuals are subject to the Foreign Agents Registration Act (FARA). This registration covers lobbying and political activities in the U.S. on behalf of foreign business or government interests.

This course is designed to help you better understand LDA and FARA requirements and your responsibilities under them.

Attendees will learn:

- The history of the Lobbying Disclosure Act.
- The definition of a lobbyist.
- Who is required to file under the LDA?
- Who is exempt from filing under the LDA?
- What is meant by lobbying contact?
- What the monetary thresholds are for registering.
- The rules for filing LDA forms with the House and Senate

- How one terminates their registration.
- What enforcement mechanisms are in place?
- Who is ineligible for federal awards, grants, or loans?
- Case studies.
- Who is required to register under FARA?
- The definition of foreign principal.
- What is political activity under FARA?
- Exemptions under FARA.
- Reporting requirements.
- Rules governing dissemination of informational materials.
- How to file FARA registration correctly.

**6. Appropriations & Budget Process**

This course will present attendees with a true understanding of the appropriations and budget processes and how to be effective for your clients.

The appropriations and budget processes are a complex maze that are not easy to maneuver. With the help of this course we are confident you will walk away with a better understanding of how the appropriations and budget processes work and the nuances of each stage.

Attendees will learn:

- The basic rules of the appropriations process.
- The various types of appropriations measures.
- The House and Senate committee structure process.
- Effective ways to get your appropriations measure through Congress.
- The first Step: The President's Budget Submission.
- The second stage: Adoption of the Budget Resolution.
- The third stage: Passage of Appropriation Bills.
- The fourth stage: Consideration of Reconciliation Legislation.
- The fifth stage: Consideration of Authorization Legislation.

**7. Drafting Legislation**

Will help government affairs professionals at all levels learn the correct ways to draft legislation that meets your constituencies' needs and goals.

Attendees will learn:

- Outlining your legislation.
- Putting pen to paper.
- Organizational and structural guidelines.
- Drafting rules.
- Style tips.
- Legislative drafting practicum: putting your skills to the test.
- Insights, observations and helpful hints.

**8. State Lobbying**

Whether veteran or novice, federal or state lobbyist, we can teach you to plan and implement a better state legislative lobbying campaign.

Attendees will learn:

- The What, Why, Who, Where, and When Elements of Effective State Legislative Lobbying.
- How to assess and increase your political strength.
- How to develop Lobbying Campaigns with effective Leave behind Materials
- How to draft a bill.
- How to negotiate with legislators and staff.
- How to get and keep a Member's vote.
- How to keep your legislation moving through the process.

**9. Communications: Effective ways of communicating with Congress, the Administration, regulatory agencies and media.**

Since the Lobbying Disclosure Act was passed back in 1995, the lobbying profession has changed significantly. Today lobbyists utilize a combination of grassroots campaigns, Internet advocacy, PR campaigns, face-to-face meetings, and ever changing technology to get their message heard. All of these tools have changed the way in which we lobby for our clients. To help you figure out the best ways to serve your clients this course focuses on how to effectively get your message delivered on Capitol Hill.

During this course you will:

- Hear from top Capitol Hill staffers on the best and most effective ways to get your message across in a short period of time.
- You will learn the best ways to utilize grassroots campaigns.
- You will hear from staffers on the best way to organize your PR campaign in today's political climate.
- You will learn what "leave behind" materials are effective and which ones are not.
- You will learn the best ways to train your association members on the "right" and "wrong" ways to meet with members of Congress and staff.
- You will get the firsthand knowledge from those who you and your association members will be meeting with on how to conduct your self during small and larger group meetings.
- Who comprises the "media"?
- How to effectively draft press releases that get published.
- How to develop media kits.
- How to develop your overall message and the best ways to communicate it.
- How to prepare for interviews.
- How to target your message to the right audience.
- Use of Paid Media v. Free Media
- Value of Twitter, Facebook, LinkedIn, Snap Chat, and other mediums
- How to Gauge Return on Investment with New Mediums
- When to Use Social Media
- How Has Social Media Changed Lobbying
- In-Person Communications v. Social Media Communications – Risk of Over Using One and Under Utilizing Another

## 10. Grassroots Lobbying and Coalition Building

Will help government affairs professionals design effective grassroots campaigns that make a difference.

Whether you work on the local, state or federal levels, the need for coalitions will play an important role in your success. Simply put, a coalition is a temporary alliance or partnering of groups in order to achieve a common purpose or to engage in joint activity. Forming coalitions with other groups of similar values, interests, and goals allows members to combine their resources and become more powerful than when they each acted alone.

This course will help you strengthen your coalition building skills. As we have come to learn here in Washington, it's all about strength in numbers. This course helps you learn the best tools to achieve this strength for your clients.

Attendees will learn:

- How to develop communication plans that motivate constituents.
- How to develop grassroots campaigns that get the attention of legislators.
- How to recruit and develop new grassroots advocates.
- What motivates constituents to get involved and how to keep them involved?
- How to effectively organize "Washington Days".
- How to track the success or failure of their grassroots campaign.
- How the formation of a coalition can shift the balance of power in a conflict situation and alter the future outcome of the conflict.
- How people who pool their resources and work together are generally more powerful and more able to advance their interests, than those who do not.
- How coalition members may be able to resist certain threats or even begin to make counter threats.
- How to identify players who may be valuable advocates for your coalition.
- Learn how to organize and coordinate your coalition.
- Learn the pros and cons of working with coalitions.
- Learn how to effectively run an issue related coalition.
- Learn the most effective ways to communicate with coalition members.
- Learn how to keep coalition members energized and on track.

**11. Developing a Fly-In Program that Works**

- Have a Clear "Ask"
- Meet With the Right Member
- Keeping It Local
- Don't Shy Away From Staff
- Follow Up
  Don't Be Late

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- Effective Leave Behind Materials
- Be Polite
- Creating an Effective Message
- Be Real
- Know Your Audience
- Dress Appropriately
- Be Prepared
- How to Get Over Being Nervous – They Are Real People Too

**12. Association Lobbying: Effective Lobbying for Non-profits and Trade Associations**

- Member Buy In
- Leadership Buy In
- Building your advocacy program
- Hiring & Managing outside lobbyists
- Managing expectations
- Understanding your members and their needs
- The realistic approach: What's possible today v. what's possible down the road