

Fall 2025 CAE Study Group

Domain 7: Advocacy and Public Policy
November 13, 2025



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Domain 7: Advocacy and Public Policy (5-7% of exam)

Advocacy encompasses strategies and actions to influence policymakers and shape public policy in support of an association's mission and its members' interests.



Government Relations - Legislative and regulatory advocacy to protect and advance the industry.



Coalition Building - Partnering with allies to promote shared policy goals.



Public Policy - Adhering to federal lobbying, PAC, and tax regulations.

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CSE's Strategic Role in Advocacy

Effective advocacy requires vision, collaboration, and a clear understanding of legal and ethical boundaries.

Leadership & Governance

- Board provides direction and oversight for advocacy strategy.
- CSE ensures initiatives are mission-aligned, ethical, and compliant.

Advocacy Tools

- Lobbying: Direct engagement with policymakers.
- Communication & Education: Informing stakeholders and the public.
- Member Mobilization: Empowering volunteers to advocate.
- Coalitions & PACs: Building influence and financial support.

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Government Relations — Guiding Principles

Why Government Relations Matters

Most associations need a government relations function — **federal**, **state**, **local**, or all three.

The CSE coordinates board and staff efforts, ensuring advocacy aligns with mission.

Board engagement includes:

- Regular advocacy updates and plan review
- Legislative and regulatory scanning
- Training board members to lead member advocacy

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The Government Relations Team

Team Composition

- Small associations: rely on outside lobbyists
- Larger associations: employ in-house lobbyists for direct and grassroots efforts
- 501(c)(6) organizations may operate a PAC

Collaboration

- Government relations staff work closely with membership and communications to provide data, messaging, and public relations support.



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Strategic Success Factors

Continuous Scanning

Ongoing monitoring of legislative and regulatory developments

Plans must remain flexible to adapt to shifting policy landscapes

Top Five Success Factors

1. Consistency with mission and strategy
2. Recognized policy expertise
3. Strong board support
4. Achievable goals
5. Adequate financial and human resources

Measuring Success

Focus on relationships and influence, not just legislation passed — advocacy is a marathon, not a sprint.

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Compliance and Legal Framework

Lobbying & Political Activity

- All advocacy must comply with lobbying and election laws.
- Even 501(c)(3) organizations may lobby within limits but cannot form PACs.

Key laws:

- Lobbying Disclosure Act (1995)
- Honest Leadership and Open Government Act (2007)

Common Pitfalls

- Awards, meals, or guest invitations for legislators are highly regulated.
- Always consult ethics staff before extending invitations.

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Calculating Lobbying Costs

Methods for Determining Lobbying Expenses

Expense Ratio Method:

$(\text{Lobbying labor hours} \div \text{total hours}) \times \text{total costs} + \text{third-party lobbying costs}$

Gross-Up Method:

$\text{Lobbying labor} \times 175\% + \text{third-party costs}$

Alternative Gross-Up Method:

$\text{Lobbying labor} \times 225\%$ (support staff = 0 hours)

Section 273a Method:

Combines ratio and gross-up methods; includes volunteer activity

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Political Action Committees (PACs)

Purpose and Benefits

- Fund state and federal candidates who align with association priorities
- Counterbalance opposing interests
- Leverage higher contribution limits
- Engage members directly in the political process

Key Rules

- Only 501(c)(6) organizations may form PACs.
- Association funds may cover PAC administration but not contributions.
- Solicitations limited to the “restricted class” — members, certain employees, and approved corporate affiliates.
- Corporate member approval must be renewed annually.

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Coalition Building – Guiding Principles

A coalition is a group of organizations working together to advance common advocacy interests.

Strong government relations programs leverage coalitions to amplify attention and influence on priority issues.

Associations expand reach by including aligned organizations, even those outside their usual network.

Coalitions may require financial commitment or be funded by entities with shared interests.

The goal: unite voices to rise above competing interests.

Establish clear goals and objectives—the coalition’s shared purpose must outweigh individual agendas.

Evaluate progress at critical milestones to ensure objectives are being met.

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Public Policy – Guiding Principles

Public policy is the set of board-approved positions that guide the association's advocacy efforts.

The CSE oversees and executes these policies as part of a comprehensive advocacy plan.

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Developing Policy Positions

Associations often shape positions that extend beyond their membership to broader campaigns.

Input is gathered from members through a government relations committee.

Policy goals should be clear, measurable, and board-approved following informed discussion.

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Issues Management

A structured campaign for monitoring, influencing, and managing public opinion on controversial issues.

Steps include:

- Define the goal (e.g., passing a bill)
- Craft a clear message
- Identify target audiences
- Build a multifaceted communication plan
- Monitor progress and adjust strategy
- Respond consistently to public perceptions

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Domain 7 CAE Exam Tips

Link questions to mission alignment, board oversight, and strategic planning (SPIE model).

Domain 7 centers on influencing policymakers, government relations, coalition building, and compliance.

Be familiar with the CSE's role in advocacy strategy, board coordination, and ethical boundaries.

Review the Lobbying Disclosure Act (1995) and Honest Leadership and Open Government Act (2007).

Understand differences between 501(c)(3) and 501(c)(6) lobbying and PAC rules.

Expect scenario questions testing compliance and ethics.

Look for the most strategic, ethical, and member-focused answer.

Eliminate answers that show tactical micromanagement or ignore compliance.

Remember: Advocacy is strategic, not reactive.

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Questions?

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