

Tips for Effective Meetings with California State Legislators

Meeting with legislators might feel daunting, but it is imperative for decision-makers to hear the voices of nonprofit leaders. You are uniquely positioned in your communities and serve as an indispensable partner to government. Just remember that elected officials work for the people – aka you! Here are a few tips and guidelines to get you started.



FIND YOUR REPRESENTATIVES

Enter your [address here](#) to find your local elected officials.

Refer to the [CalNonprofits Guide to the Members of the Legislature](#) for background details on each official.

REQUEST A MEETING

*First, check to see if the legislator's website has a meeting request form; many offices will only accept meeting requests this way so that they can process inquiries. **See an example here.***

- If you send a direct email, always address it to the legislator and CC their scheduler!
- Don't forget to mention if you personally are a constituent and/or your organization works in their district.
- Share the issue that you wish to discuss. Include a bill number if you're discussing specific legislation.
- Note if you want to meet at the Capitol, in the district, or online.

PREPARE FOR YOUR MEETING

Expect the meeting to be very brief – 10-15 minutes is typical – so plan accordingly. Make sure your remarks are straightforward and any requests are clear.

Set your goal. Are you making a specific ask? Are you just sharing information?

Prepare talking points. Practice!

Assign speaking roles in advance; know who is saying what and for how long.

Anticipate potential questions and form responses in advance.

Do your research: what committees do they sit on? What causes do they care about?

SAMPLE EMAIL

Keep it short and simple!

Dear Rep. X,

My name is Jane Smith and I serve as a case manager at XYZ organization, which provides services to low-income seniors in your district. I am requesting a meeting to share how changes to state contracting (AB 1234) would support our work in the local community. The meeting will be with myself and our executive director, John Doe.

We are available to meet in your district or online on [Dates] from [Times]. If those times do not work we will do our best to be flexible and work around your schedule. Thank you for your consideration and we look forward to connecting and hearing your feedback!



DURING THE MEETING

Don't be disappointed if you meet with staff and not the legislator. They are vital to advancing the legislator's agenda and deserve the same respect.

Make sure to introduce yourself and thank them for their time. Sharing personal or professional connections is appropriate.

Engage in effective storytelling. Share personal and local examples (especially if you are their constituent) on the impacts of any proposed legislation.

Make requests clear; ask if they support/oppose your proposal and why.

POST MEETING FOLLOW-UP

Make a list of any follow-up tasks so your team can address them promptly.

Send a thank you email to the legislator and their staff; include any materials you provided in the meeting for easy reference.

Set a date to follow up with the legislator if there was an action item, such as checking in on what they decided for your request. Staying on top of any follow-ups is important.

SAMPLE MEETING SCHEDULE

9:00-9:02 Introduction **Person A**

9:02-9:06 Proposal **Person B**

9:06-9:12 Discussion **Person A**

9:12-9:14 Request **Person C**

9:14-9:15 Thank you **Person B**



OTHER GENERAL GUIDANCE

- Sign up for a **legislator's newsletter** to see how they talk about their work and priorities.
- Being a **trustworthy source** goes a long way. Make sure your data and information are accurate.
- Remember their **emails can become public** through data requests, so choose your words with care!
- **Build a relationship.** Reach out and thank them when they vote in favor of a mutual goal, or when you have a win in common. Don't only contact a legislator when you need something from them.

SHAREABLE SECTOR STATS

10% of the state's workforce is employed by nonprofits

1.7M employees work for nonprofits in California

109K nonprofits contribute to California's economy

1 in 14 California jobs is at a nonprofit

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