

Contacting Your Legislators: Protocol

California Senate and Assembly members want to hear from their constituents—you—the voters in their districts. At times, your association may call on you to do some grassroots lobbying. Often, the contact from a district constituent can sway a legislator’s vote.

Here are some guidelines for you to follow in contacting your legislators in person, by phone or by letter.

- **Be thoughtful.** Commend the right things which your legislator does. That’s the way you’d like to be treated.
- **Be reasonable.** Recognize that there are legitimate differences of opinion. Never indulge in threats or recriminations.
- **Be realistic.** Remember that most controversial legislation is the result of compromise. Don’t expect that everything will go your way, and don’t be too critical when it doesn’t.
- **Be accurate and factual.** The mere fact that you want or do not want a piece of legislation isn’t enough. If an issue goes against you, don’t rush to blame the legislator for “failing to do what you wanted.” Make certain you have the necessary information and do a good job of presenting your case.
- **Be understanding.** Put yourself in a legislator’s place. Try to understand his/her problems, outlook and aims. Then you are more likely to help him/her understand your business and problems.
- **Be friendly.** Don’t contact your legislator only when you want his/her vote. Invite him/her to your place of business or your group meetings. Take pains to keep in touch with him/her throughout the year.
- **Give credit where it is due.** If an issue goes the way you wanted, remember that your legislator deserves first credit. He/she has the vote, not you. And, remember also that many organizations and individuals participated on your side.
- **Learn to evaluate issues.** The introduction of a legislative bill doesn’t mean that it will become law. Whether you’re for it or against it, don’t get excited about it until you learn the who, what and why of it.
- **Support your legislator.** If he/she is running for re-election and if you believe he/she deserves it, give him/her your support. He/she needs workers and financial supporters. Don’t become aloof at the time when your legislator needs your help.
- **Don’t, don’t, don’t even hint that you think certain bills, campaigns or politics in general are not worthwhile or may be dishonest.**
- **Don’t demand anything.** And don’t be rude or threatening. There is always “the future,” and in many cases a legislator may disagree with you on one issue and be supportive on another.
- **Don’t be vague or deceptive, righteous or long-winded, and please don’t remind the legislator that you are a taxpayer and voter in his/her district.** (He/she knows it!)
- **Don’t be an extremist.** Remember, your legislator represents all his/her constituents—those you consider liberal and those you consider conservative. Don’t condemn a legislator just because he/she supports a piece of legislation that you think is too liberal or too conservative.
- **Don’t be a busybody.** Legislators don’t like to be pestered, scolded or preached to. Neither do you.
- **Be cooperative.** If your legislator makes a reasonable request, try to comply with it. You can help him/her by giving him/her the information he/she needs. Don’t back away for fear you are “getting into politics.”

Letter Writing

Following are guidelines for an effective letter:

- Be brief.
- Refer to bill numbers whenever possible.
- Make sure the legislator knows this communication is from a constituent who lives and/or does business in the legislator’s district.
- Explain how the proposed legislation affects your business, and why you support/oppose it.
- Don’t attempt to give “expert” opinions. Tell how the legislation would affect your business, based on your experience and knowledge.
- Ask for the legislator’s support or opposition.
- Write the letter without copying any association-provided background information verbatim.
- Request that your legislator take a specific action by telling him/her what you desire. State the facts as you see them. Avoid emotional arguments. If you use dollar figures, be realistic.
- Ask the legislator what his/her position is.
- Keep all communications friendly and respectful. Be sure to thank your legislator for considering your views.
- Write on your personal or business letterhead if possible, and sign your name over your typed signature at the end of your message.
- Be sure your exact return address is on the letter, not just the envelope. Envelopes sometimes get thrown away before the letter is answered.
- Be reasonable. Don’t ask for the impossible. Don’t threaten. Don’t say, “I’ll never vote for you unless you do such and such.” That will not help your cause; it may even harm it.
- Be constructive. If a bill deals with a problem you admit exists, but you believe the bill is the wrong approach, tell what the right approach is.

- Send your association a copy of your letter and a copy of the response you receive from your legislator.
- Address all letters in the following manner, unless you are on a first name basis:

State Legislature:

- *Assembly Member*
The Honorable Joe/Jo Doe
California State Assembly
1021 O Street
Sacramento, CA 95814
Dear Assembly Member Doe:
- *Senator*
The Honorable Joe/Jo Doe
California State Senate
1021 O Street
Sacramento, CA 95814
Dear Senator Doe:

Local Elected Officials:

- *Council Member*
The Honorable Joe/Jo Doe
Councilman/woman,
City of—
City Hall
City, State and Zip Code
Dear Mr./Ms./Mrs./Miss Doe:
- *County Supervisor*
The Honorable Joe/Jo Doe
Supervisor, —County
County Seat
City, State and Zip Code
Dear Sir/Madam:
or Dear Mr./Ms./Mrs./Miss Doe:

Guidelines for District Visits

The following guidelines may be helpful when you make district visits:

- Members of the state Legislature rely heavily on their staffs for a major portion of their responsibilities, i.e., scheduling, advice on specific legislation, constituent problems, etc.

This is why it is important to maintain some familiarity with the district office staff. However, you do want to become acquainted and develop a working relationship directly with the legislators in your district.

- Generally, the legislative schedule permits each legislator to visit the district office on Fridays and holidays.
- Always call in advance for an appointment and briefly explain the purpose of the meeting. As a business person, you are an important constituent and the politician and his/her aides are eager to get acquainted.
- If the meeting with the member of the Senate or Assembly is for the purpose of discussing specific legislation, review the background information and position statements available from your association and use the bill numbers when possible.
- Ask the legislator for his/her position on issues and how he/she will vote.

Other activities

We encourage you to consider other activities as ways of effectively maintaining liaison with your district legislators:

- Invite other members of your profession to join you and your legislator for lunch.
- Invite your legislator to visit your company. You may want to have a short meeting between your employees and the legislator. The legislator could make brief remarks, followed by a question-and-answer period.
- Offer to help organize an information business advisory group to meet regularly with your legislators to discuss business and key industry issues.

Telephone Procedures

- When the Legislature is in session, call the Capitol office; during recess and on Fridays, call the district office.
- Ask to speak directly to the legislator. If he/she is not available, ask to speak to the administrative assistant or legislative aide.
- When the legislator or his/her assistant is on the line, identify yourself and mention the name of your company and the fact that you are from the legislator's district.
- State the reason for the call. Use bill numbers whenever possible.
- Explain how the proposed legislation affects your business and why you support or oppose it.
- Discuss only one issue per telephone call.
- Ask the legislator's position.
 - ✓ If the legislator's position is the same as yours, express agreement and thanks.
 - ✓ If your position differs from the legislator's, politely express disappointment and offer some factual information supporting your views.
- Don't attempt to give "expert" opinions. Tell how legislation would affect your business, based on your experience and knowledge.
- Request that your legislator take a specific action by telling him/her what you desire. State the facts as you see them. Avoid emotional arguments. If you use dollar figures, be realistic.
- Keep all communication friendly and respectful.
- Thank the legislator or aide for his/her time and for considering your views.

The Legislative Process

- **Senate:** 40 members
- **Assembly:** 80 members
- **Regular Session:** Convened on the first Monday in December of each even-numbered year and continues until November 30 of the next even-numbered year.
- **Special Session:** May be called by the Governor and is limited to a specific subject. Length is not limited and may be held concurrently with the regular session.
- **Effective Date of Laws:** January 1 of the year after enactment unless an urgency measure, which takes effect immediately upon being signed, or a different effective date is specified.

Procedure

- **Introduction:** The bill is introduced by a member of the Senate or Assembly, read for the first time, then assigned to a committee by either the Senate Rules Committee or the Assembly Speaker.
- **Committee:** Hearing(s) are held in committee and testimony is taken from proponents and opponents. Generally, the committee will then amend, pass or fail to pass the bill.
- **Second Reading:** Bills that are passed by committee are read a second time and sent to the full floor for debate.
- **Floor Debate (in house of origin):** The bill is read a third time, debated and voted on. Most bills need a majority to pass (21 for the Senate, 41 for the Assembly). Bills with urgency clauses, appropriation measures and some tax-related bills need a two-thirds majority (27 for the Senate, 54 for the Assembly). If the bill is passed, it is sent to the second house.
- **Second House:** Procedures for a bill to pass the second house are similar to consideration and passage in the house of origin.
- **Amendments:** If the second house passes a bill with amendments, then the bill must be passed a second time by the house of origin for concurrence. If the amendments are rejected, a conference committee is formed to iron out the differences between the two houses.
- **Governor:** The Governor must act on (sign or veto) any bill that passes the Legislature within 12 days during the legislative session. However, the Governor has 30 days in which to act at the end of each year of the legislative session. Bills not acted on by the Governor automatically become law. A two-thirds vote of the Legislature is required to override a Governor's veto.

How to Write an Effective Lobbying Letter

Address lobbying correspondence to the author of the bill with copies to members of the committee hearing the bill and to your local legislator.

Indicate immediately which bill you're addressing by its bill number (AB__ if it originates in the Assembly, SB__ if it originates in the Senate), by an identifying phrase and whether you support or oppose the bill. This will help legislative staff in routing your letter.

Be sure to make clear for whom you're speaking.

Be sure to be clear about what action you want the legislator to take.

If you have a personal relationship with the legislator, take a moment to write a quick, handwritten note to draw his or her attention to your letter.

Be sure to send a copy of your letter to the Governor. Also please send a copy to the CalChamber staff members assigned to the bill so they can include information on your support or opposition in their committee testimony.

Use your business letterhead when communicating your position on a bill.



April 16, 2024

TO: Members, Assembly Education Committee

FROM: Robert Moutrie, Senior Policy Advocate *[Signature]*

SUBJECT: AB 2927 (MCCARTY) PUPIL INSTRUCTION: HIGH SCHOOL GRADUATION REQUIREMENTS: PERSONAL FINANCE SUPPORT – AS INTRODUCED FEBRUARY 15, 2024 SCHEDULED FOR HEARING – APRIL 24, 2024

The California Chamber of Commerce is pleased to **SUPPORT AB 2927 (McCarty)**, as introduced February 15, 2024, because it would ensure that California's students enter their adult lives with an understanding of personal finance via a one-semester course to be completed during high school, beginning with the class of 2030.

When a student graduates from high school, they are already making very significant financial decisions about their lives – including whether to start working (if they haven't already), whether to take out a loan for additional education, or whether to purchase a car. All of these decisions will affect their financial future for years (if not decades) to come – and yet, many students do not understand the basics surrounding personal finance. This includes such basics as: how does debt (such as on a credit card or a car loan) work? How can they build good credit? How should they look towards saving for the future? What's the difference between a savings account, a checking account, or a money market account? Simply put – they are unprepared for the commercial waters which they are about to swim in.

We believe that **AB 2927** helps to address that need. Though we admit that additional coursework is a cost in this difficult budget climate, we see the life-long dividends for California's youth from such knowledge as exponentially exceeding the costs.

For these reasons, we **SUPPORT AB 2927 (McCarty)**.

cc: Legislative Affairs, Office of the Governor
Garrett Jensen, Office of Assemblymember McCartney
Consultant, Assembly Education Committee
Bob Becker, Assembly Republican Caucus

RM:ldl

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Sacramento, CA 95814
916 444 6670
www.calchamber.com

Keep your letter short. A succinct, one-page letter will have more impact than a longer one. If you have documentation of the bill's impact on your business, enclose it, but keep the letter short.

In many committees, staff members file correspondence according to the date of the bill's next hearing. If you know the date, be sure to include it. Including such information will help ensure your letter is read in time to have an impact.

Get to the point of your letter quickly: your support for or opposition to the bill.

Provide concrete, credible information on the impact of proposed legislation on your business.

Elected officials prefer to hear from persons in authority rather than just from staff members. A letter will have more impact if the business owner or person in a management position signs the letter.

Use boldface type, underlining or italics sparingly to emphasize important points.

Act promptly. Too many good lobbying letters arrive after a vote already has been taken.

Later...If the legislator does what you ask, be sure to send a thank you letter.

Impact California
Make a difference by using easy-to-edit sample letters and links to more information about bills and legislators at www.impact-california.com.

Guide to Reading a Bill

Indicates house of origin.

AMENDED IN SENATE JUNE 13, 2024
 AMENDED IN ASSEMBLY APRIL 30, 2024
 CALIFORNIA LEGISLATURE—2023–24 REGULAR SESSION

ASSEMBLY BILL **No. 2927**

Introduced by Assembly Member McCarty
(Principal coauthors: Assembly Members Petrie-Norris, Schiavo, Soria, and Ting)
(Coauthors: Assembly Members Alanis, Alvarez, Chen, Gipson, Low, Joe Patterson, Wallis, and Wilson)
(Coauthors: Senators Alvarado-Gil, Min, and Niello)

Date noted each time bill is amended.

Bills are introduced in sequential number in each house.

Date introduced.

February 15, 2024

An act to amend ~~Section 51225.3~~ Sections 44257, 51225.3, and 51284.5 of, and to add Section 51225.32 to, the Education Code, relating to pupil ~~instruction~~: *instruction, making an appropriation therefor, and declaring the urgency thereof, to take effect immediately.*

Code section being added or amended.

Legislative Counsel drafts all legislation and writes a summary.

LEGISLATIVE COUNSEL'S DIGEST

AB 2927, as amended, McCarty. Pupil instruction: high school graduation requirements: personal finance.
 (1) Existing law requires a pupil to complete designated coursework while in grades 9 to 12, inclusive, in order to receive a diploma of graduation from high school. These graduation requirements include, among others, the completion of 3 courses in social studies, including a one-semester course in economics. ~~Existing law requires the Instructional Quality Commission to consider including age-appropriate information on financial literacy when the history-social science curriculum framework is next revised after January 1, 2017.~~

Strikethrough text indicates language that is being deleted; italics highlight language that is being added by an amendment.

The actual language that will be a part of the state code when the bill is enacted into law appears following the line: "The people of the State of California do enact as follows."

California Government Glossary

Legislature

The two “houses” that pass or reject proposed new laws.

Assembly: 80-member lower house of the Legislature. Its members serve two-year terms. 80 members are elected every two years.

Senate: 40-member upper house of the Legislature. Its members serve four-year terms. 20 members are elected every two years.

Legislation

Bill: A proposed law or statute that amends or repeals existing laws or proposes new laws. Most bills require a majority vote. If there is a fiscal impact, a bill requires a two-thirds vote.

► AB 0000—Assembly Bill

► SB 0000—Senate Bill

Constitutional Amendment:

A proposed change in the state Constitution, which, after approval of two-thirds of the legislators, is submitted to the voters, who also must approve the change.

- ACA 0000—Assembly (authored) Constitutional Amendment.
- SCA 0000—Senate (authored) Constitutional Amendment.

Concurrent Resolution: A legislative proposal that commends individuals or groups, adopts legislative rules or establishes joint committees.

- ACR 0000—Assembly Concurrent Resolution.
- SCR 0000—Senate Concurrent Resolution.

Joint Resolution: A legislative opinion on matters pertaining to the federal government, often urging passage or defeat of legislation pending before Congress.

- AJR 0000—Assembly Joint Resolution.
- SJR 0000—Senate Joint Resolution.

Assembly and Senate Resolutions: An expression of sentiment of one house of the Legislature. Resolutions usually ask a committee to study a specific problem, create interim committees or amend house rules. Resolutions take effect upon adoption.

- AR 0000—Assembly Resolution.
- SR 0000—Senate Resolution.

Spot Bill: Bill introduced that usually makes nonsubstantive changes in a law. The spot bill is substantially amended at a later date. This procedure evades the deadline for the introduction of bills.

Legislative Process

Legislative Counsel: A staff of more than 80 attorneys who draft legislation (bills) and proposed amendments, review, analyze and render opinions on legal matters of concern to the Legislature. The Legislative Counsel’s Digest is a summary of a bill’s content contrasting existing law with proposed law (in lay language) and appears on the face of each bill.

Legislative Analyst: Provides advice to the Legislature on anything with a fiscal implication, which can cover virtually every major bill. The analyst annually publishes a detailed analysis of the Governor’s budget, which becomes the basis for legislative hearings on the fiscal program.

Author: Member of state Senate or Assembly who submits or introduces a bill and carries it through the legislative process.

Floor Manager: Speaks as author when the bill is being heard in the second house. (Assembly members are not allowed to present bills on the Senate floor and vice versa.)

Sponsor: Interest groups or constituents from the legislator’s district who bring suggested legislation to the attention of the prospective author (legislator).

Standing Committee: The forum used in the Senate and Assembly for studying bills and hearing testimony from the author, proponents and opponents.

- Many bills are heard by two or more committees in each house.
- If a majority of the committee members approve the bill, it is sent to the floor (or, if it has fiscal impact, to the Senate or Assembly Appropriations Committee) with a recommendation “Do Pass.” It takes a majority vote of committee members present to amend a bill.
- Your association’s legislative advocate and other members often testify before such committees.

Committee Consultants and Aides:

Every legislator has a personal staff plus the assistance of specialists assigned to committees and to the party caucuses. This research staff is responsible for analyzing the pros and cons of the proposed legislation.

Introduction and First Reading: Bill is submitted by member of Senate or Assembly, numbered and read. It is assigned to a committee by the Senate Rules Committee or Assembly Speaker and printed.

Second Reading: When the bill passes the policy committee, it is read on the house floor for a second time.

Third Reading: Bill is read a third time and debated. A roll call vote follows. If passed or passed with amendments, the bill is sent to the second house (or, if it already is in the second house, it is returned to the house of origin) for consideration of amendments.

Enrollment: Legislation that has passed both houses is sent to enrollment for proofreading for consistency before being sent to the Governor for approval.

Veto: The Governor’s formal disapproval of a proposal passed by the Legislature. The Governor also may exercise a line item veto to reduce or eliminate an appropriation while approving the rest of the bill. A veto may be overridden by a two-thirds vote of each house.

Chaptered: A bill that has passed both houses and has been signed by the Governor is said to be “chaptered.” The bill becomes law January 1 of the following year unless it contains an urgency clause (takes effect immediately) or specifies its effective date.

Sunset Clause: Acts of the state Legislature that expire after a certain date unless renewed by the Legislature.

Voter Responses

The techniques of direct democracy enable citizens to bypass elected government bodies and act directly on policy matters.

Initiative: A local or state measure that is placed on the ballot after a certain number of registered voters sign petitions supporting its placement on the ballot. Initiatives often are used by groups or individuals when the Legislature fails to pass a law they want to enact.

Referendum: A procedure whereby the voters may approve or disapprove proposals recommended by a legislative body, such as a proposal for an increase in the tax rate.

Recall: A procedure whereby petitions are circulated calling for removal of a public official from office. If a sufficient number of signatures is obtained, an election is held in which voters decide whether to keep the official in office.

PAC: A Political Action Committee is a nonprofit committee that provides a lawful means to help elect and re-elect political candidates selected on the basis of their positions on industry-related issues, committee assignments and leadership in the Legislature. PACs make contributions to candidates or in support of or opposition to ballot measures.

California State Government — The Executive Branch

The executive branch administers and enforces the laws of California. Led by the Governor, the California executive branch is made up of more than 200 state entities.

The executive officials of the branch—such as the Governor, Lieutenant Governor, Secretary of State and Attorney General, to name a few—are elected by the people of California. Each of these officers is elected to serve a four-year term, and may be elected to an office a maximum of two times.

Within the executive branch there are four types of entities: agencies, which are headed by a secretary; departments, which are headed by a director; and boards and commissions, which are headed by an executive officer or board member.

A number of entities, such as the

Regents of the University of California and the Public Utilities Commission, are intended to be independent of direct control by all three branches of the state government. Most of the leaders of these entities are appointed by the Governor and confirmed by the California Senate.

The Governor also is responsible for appointing the secretaries/directors of 11 Cabinet-level state agencies/departments: Business, Consumer Services and Housing; Corrections and Rehabilitation (department); Environmental Protection; Finance (department); Food and Agriculture (department); Natural Resources; Government Operations; Health and Human Services; Labor and Workforce Development; Transportation; and Veterans Affairs (department).

Each Cabinet-level agency includes multiple departments, whose leaders

also are appointed by the Governor and usually subject to confirmation by the Senate. The Cabinet-level Natural Resources Agency, for example, includes the Department of Water Resources, the Department of Parks and Recreation, and the California Energy Commission, to name three of 13 entities within that agency.

Each state entity wields significant power and plays a large role in interpreting and applying the laws of the state.

To find a state agency, department, board or office, visit www.ca.gov/agencysearch/.

The organizational chart is available at <https://www.gov.ca.gov/orgchart/>.

Referral number for state agencies: (800) 807-6755.