

GRASS ROOTS ADVOCACY: A “HOWTO” GUIDE

CAPPS LEGISLATIVE HANDBOOK

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The private postsecondary segment of higher education has a tremendous story to tell:
Private career schools and colleges in California have graduated millions of students over the years and have placed them in rewarding jobs.

Unfortunately, too often those efforts go unnoticed and government action either ignores or severely restricts private career education and training.

Sometimes, we are our own worst enemies.

We fail to tell our story or engage actively in the political process. We are caught up in the day-to-day operations of our business and forget to become involved in those activities that are essential to ensure the participation of our students in government programs.

CAPPS is working to change that.

It recognizes that collectively we must exert a major effort just to remain viable as a provider of postsecondary education in California. However, CAPPS needs your individual and corporate participation to be successful.

The following pages are intended to be a quick primer on how to participate effectively in the political process. Yes, it can take considerable time, effort, and money.

However, you can be assured that the effort is more than worth it.

This handbook provides how-to tips:

- Educate legislators on issues important to private career schools and their students
- Obtain positive recognition for these schools and students
- Assist legislators in local campaigns, fundraising, phone banks, and door-to-door canvassing
- Promote the passage of important and relevant legislation

The continued success of the CAPPS grassroots effort depends on the energy and commitment of all our members.

Take time to read what follows, set up your own political timetable and goals, and then implement them. CAPPS will be pleased to give you guidance and assistance along the way.

CAPPS is always available to talk over any issue and discuss strategy and approach.

Call us at (916) 447-5500 or reach us by email at info@cappsonline.org and we will help.

(this is important)
When Meeting or Talking
with a Legislator:

DO

ask legislators for their opinions

ask legislators for a commitment to support your legislative position

give concrete examples of how your position will benefit the legislator's constituents

be considerate of the legislator's time

have handouts summarizing your position

DON'T

praise Republicans to Democrats or Democrats to Republicans

tell a Republican you have registered as a Democrat or vice versa

praise one legislator in front of another

overstate or exaggerate your position

discuss political contributions and legislation at the same meeting

threaten or strong-arm

Phone Calls

From time to time, as a sector representative, you may have to contact your legislator by telephone. The following guidelines may be helpful:

When the Legislature is in session, it is most effective to call at the Sacramento office. During recess, the legislator will likely be available at the district office.

Ask to speak directly to the legislator. Occasionally, time does not permit legislators to receive or return telephone calls. Be prepared to ask to speak with the staff person who is handling the particular subject (this applies only when a call is made to the legislator's Capitol office).

When the legislator or his/her assistant is on the line, identify yourself and mention that you are a constituent, and a CAPPs member.

State the reason for the call. Use bill numbers whenever possible. You should feel comfortable with the issue and the Association's position on it when making the call. Explain how the proposed legislation affects your school and your students and why you support or oppose it.

Discuss only one issue per telephone call.

Ask for the legislator's position.

If the legislator's position is the same as yours and CAPPs, express agreement and thanks.

If the CAPPs position differs from the legislator's, politely express disappointment and offer some facts supporting your views.

Do not attempt to give "expert" opinions. Express how the legislation would affect your school and students, based on your experience and knowledge.

Request that your legislator take a specific action by telling him/her what you want. State the facts as you see them. Avoid emotional arguments. If you use dollar figures, be realistic.

Letters & Emails

Letters and emails from constituents are an important source of information for legislators regarding matters of concern to the State and district. In order to write an effective letter, the following guidelines are suggested.

Be brief. Keep all communications friendly and respectful.

Ensure the legislator knows this communication is from a constituent and/or CAPPs member.

Explain the Association's interest in the legislation and why the Association supports/opposes it.

Refer to the bill number whenever possible.

Ask for the legislator's support or opposition.

Ask the legislator for a response specifying both his/her position and reasoning.

Use your office stationery and address all letters in the following manner:

The Honorable John Doe
State Capitol, Room _____
Sacramento, CA 95814

Dear Assemblymember Doe: (Or use first name if on a first-name basis)

The Honorable John Doe
State Capitol, Room _____
Sacramento, CA 95814

Dear Senator Doe: (Or use first name if on a first-name basis)

You should also consider using postcards and letters from students to support CAPPs' positions.

You may also e-mail your letter. Be sure to include a very brief subject line indicating the topic of your communication and whether you are opposed or in favor of legislative action on that subject. Given the prevalence of e-mail campaigns, it is important that legislative staff be able to quickly summarize your communications.

A Sample Letter:

Use the text below as a template. Personalize the letter with your comments and send to your Assemblymember

(DATE)

The Honorable John Doe
State Capitol, Room _____
Sacramento, California 95814

Re: Bill Number – Support or Oppose

Dear Assemblymember Doe:

The California Association of Private Postsecondary Schools (CAPPs) has sponsored SB_____, by Senator Joe Smith, which would include CAPPs as a member of the School-to-Career task force. As an owner and manager of a career school in your district, I urge you to vote AYE when this bill comes before you. Our schools have trained students and placed them in jobs since the task force was founded. Including private career colleges in this task force would enhance the current committee's effectiveness.

I urge you to support this measure. I would be very interested in what your position is on this legislation. Thank you for your consideration, and please call upon me if I may be of assistance to you.

Sincerely,

Bill Jones
President

The California Legislative Process

The California Senate has 40 members

The California Assembly has 80 members

Regular Session: Convenes on the first Monday in December of each even-numbered year and continues until November 30 of the next even-numbered year (biennium session).

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 legislative session.

Effective Date Of Laws Unless Specified: January 1 of the following year.

Procedure

Introduction The bill is introduced by a Senator or Assemblymember, read for the first time, and assigned to a Committee by either the Assembly Speaker or Senate Rules Committee.

Policy Committee Hearing is held in committee and testimony is taken from proponents and opponents. Generally, the Committee will then amend, pass, or fail to pass the bill. If the bill has no appropriation request, it goes directly to second reading if approved by the policy committee.

Fiscal Committee Any bill that asks for an appropriation of money must be approved by the fiscal committee, in addition to the policy committee. The fiscal committee may consider the policy area of the bill as well as its fiscal impact. A majority vote is required for passage of a bill from this committee.

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 in Senate, 41 in Assembly). Bills with urgency clauses, appropriation measures, and some tax-related bills need a two-thirds majority (21 in Senate, 54 in Assembly). If the bill is passed, it is sent to the second House.

Second House Procedures to pass the second House are similar to consideration and passage in the House of origin.

Amendments Should the second House pass a bill with amendments, 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 (sign or veto) on any bill which passes the Legislature within 12 days during a legislative session. However, the Governor has 30 days to act at the end of the biennium. 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 Find Your State Legislator

Visit www.legislature.ca.gov/port-zipsearch.html. Enter your zip code to find the Legislator(s) who represent your area.

Guidelines for District Visits

The following guidelines may be helpful as you make your district visits:

Members of the State Legislature rely heavily on their staff for a major portion of their responsibilities, e.g., scheduling, advice on specific legislation, constituent problems. This is why it is important to maintain some familiarity with the Field Deputy or Administrative Assistant. However, the main purpose of the CAPPs Legislative Program is to develop and maintain a good working relationship directly between you and the legislator(s) in your district.

Generally, the legislative schedule permits each legislator to visit the district office on Fridays and holidays. Meetings may be arranged for as long as an entire lunch period. They may also be as brief as a ten-minute session in the district office. Each constituent should be prepared to keep his/her presentation and questions to the time schedule previously arranged, unless the legislator wants to discuss other matters.

Always call in advance for an appointment and briefly explain the purpose of the meeting. As a CAPPs representative, you are an important constituent and the legislator and his/her aides are eager to be acquainted.

Review your legislator's background and legislative and committee responsibilities before the meeting. This information is available from CAPPs or on the Assembly or Senate websites (www.assembly.ca.gov and www.senate.ca.gov).

If the meeting with the Senator or Assemblymember is to discuss specific legislation, review the background information and position statements available from CAPPs.

Use the bill numbers when possible. As appropriate, ask or inform the legislator when a vote is expected before the legislator is committed. Ensure the legislator knows why you and CAPPs feel this legislation is important.

Ask the legislator for his/her position on issues and how he/she will vote. It is important to know a legislator's feelings even if he/she is inclined to vote contrary to CAPPs's position.

After meeting with the legislator or the staff person, complete the legislative Contact Sheet and return a copy to the CAPPs office. (Template for the Legislative Contact Sheet can be found at the end of this document.)

The Political Campaign

The election of a legislator tends to be the most important consideration in politics. Quite naturally, legislators are concerned about being reelected without having to organize major campaigns every few years.

The goal of the CAPPs Legislative Program is to assist legislators who assist CAPPs institutions and their students by helping in their reelection campaigns.

DO

- Volunteer
- Eet-up telephone banks in your offices
- Give money
- Raise money
- Provide in-kind contributions

DON'T

- Promise more than you can deliver.
- Ask immediately to be put on the campaign steering committee.
- Offer advice on media, strategy, or other campaign materials.
- Mix CAPPs legislative issues with the campaign process.
- Discuss other elected officials.
- (In other words, earn a respected position in the legislator's political family.)

STEP 1: DETERMINE WHAT RESOURCES YOU OR YOUR SCHOOL CAN PROVIDE TO A CAMPAIGN.

Campaigns need only three things -- money, volunteers, and in-kind contributions that enhance a campaign (e.g., free office space, desks, chairs, office supplies, telephones, food for volunteers).

When making an appointment with your legislator/candidate, advise the scheduling secretary that the purpose of the appointment is to discuss the assistance CAPPs can give to the legislator's campaign. Meet only with the legislator/candidate. Staff may be present, but the legislator/candidate must be present, if possible.

Tell the legislator/candidate that CAPPs supports his/her efforts and the local members of CAPPs want to do anything they can to see that he/she is reelected. Outline exactly what you can do to help, and ask if this fits the legislator's campaign plan.

After you and the legislator/candidate agree to the tasks, send a follow-up letter spelling out in detail your understanding of the role you are to play in the campaign. (Send a copy of this letter to CAPPs so that your ideas can be used elsewhere.)

STEP 2: COMPLETE THE TASKS YOU AGREED TO COMPLETE.

The campaign depends on people working together, so when people do not fulfill their responsibilities, it affects every element of the campaign. Do not make promises or commitments that you cannot keep.

1. Volunteer. The volunteer is still a very important element in a local campaign. Mailers need to be hand addressed, stuffed into envelopes, and mailed. Volunteers are needed to keep the campaign headquarters open, phones answered, and letters typed. Many campaigns have volunteers to walk door-to-door in targeted precincts to carry the campaign message to voters.

Maintain a record of local CAPPs members, their staff, students, and members of your staff who are willing to volunteer in campaigns. The listing for each person should contain relevant skills or interests and when the volunteer is available. Again, the volunteer must be reliable. If they say they will do a job, they must do it, or get someone to take their place.

Imagine the impact on a local legislator if his/her campaign office is primarily staffed by CAPPs troops. When the legislator needs to get out a fundraising mailer, the CAPPs troops are helping to "move the mail." That's Power!

2. Contribute Funds. Yes, money still is the "mother's milk of politics." It costs anywhere from \$200,000 to \$500,000 to run a major campaign for legislative office. In addition, legislators know who gives them money and who does not, and they do not have to be reminded of who has been to their fundraisers.

STEP 3: DEVELOP A GAME PLAN

MONTH ONE:

CONTACT STATE SENATOR'S OFFICE

Telephone the district office of your State Senator and arrange to meet with the Field Deputy. This meeting could take place either in the district office or at a breakfast, lunch, or dinner.

Purpose: To introduce yourself and CAPPs to the Field Deputy and to explain that:

You are a constituent and have a private career school in his or her district. Indicate that you are the local representative assigned to work with the legislator on legislation, campaign assistance, and fundraising.

You would like to set a date next month to meet personally with the legislator.

A Contact Sheet should be completed for each contact you make, giving pertinent data. While this initial meeting may be brief, it is important, since it establishes the basis for future meetings and provides an opportunity to indicate that frequent communication will be desirable for both parties.

Follow-up: Send a note thanking the aide for the opportunity to meet and express that you look forward to continuing dialogue in the future.

MONTH TWO:

CONTACT STATE SENATORS

Telephone the Senator's district office, talk with the Field Deputy and confirm/set-up a date to meet -- either for lunch, at the district office or at the branch -- with the Senator on his/her next visit to the district.

Meeting: The Contact Sheet will provide data outlining policy areas in which the legislator has some special interest. Where appropriate, key industry legislation may be included as a discussion point. Important community issues may also be used as a means of stimulating or opening the discussion. It is important to explain that CAPPs has established a Legislative Program on a statewide basis to assist local legislators in the areas of:

Information about local legislative interests and concerns.

The reelection campaigns including, but not limited to, precinct work, telephone banks in the school offices, campaign volunteers, state political action contributions, and local fundraising.

IMPORTANT: Never state or imply that the help is available only if the legislator supports CAPPs's positions. Legislators are aware that groups are not as supportive of unfriendly legislators as they are friendly legislators.

Follow-up: Send a note thanking the Senator for the opportunity to meet and express the sentiment that you look forward to a continuing dialogue in the future.

Contact Sheet: Complete the information at the bottom of the Contact Sheet and return a copy to CAPPs.

MONTH THREE:

CONTACT STATE ASSEMBLYMEMBER'S OFFICE

Telephone the district office of the State Assemblymember and arrange for a similar meeting with the Field Deputy as in the first month.

Purpose: To introduce yourself to the Field Deputy and to explain that:

You are a constituent and a private career school in his/her district. Indicate that you are the local representative assigned to work with the legislator on legislation, campaign assistance, and fundraising.

You would like to set a date next month to meet personally with the Assemblymember.

Follow-up: Send a note thanking the aide for the opportunity to meet and express the sentiment that you look forward to a continuing dialogue in the future.

Contact Sheet: Complete the information at the bottom of the Contact Sheet and return a copy to CAPPs.

MONTH FOUR:

CONTACT STATE ASSEMBLYMEMBER

Telephone the district office of the Assemblymember and talk with the Deputy to confirm/schedule the meeting with the Assemblymember on his/her next trip to the district office.

Meeting: The Contact Sheet will provide data outlining policy areas in which the legislator has some special interest. Where appropriate, key industry legislation may be included as a discussion point. Important community issues may also be used as a means of stimulating or opening the discussion. It is important to explain that CAPPs has established a Legislative Program on a statewide basis to assist local legislators in the areas of:

Information about local legislative interests and concerns.

The reelection campaigns, including, but not limited to, precinct work, telephone banks in the school offices, campaign volunteers, state political action contributions, and local fundraising.

IMPORTANT:: Never state or imply that the help is available only if the legislator supports CAPPs' positions. Legislators are aware that groups are not as supportive of unfriendly legislators as they are friendly legislators.

Follow-up: Send a note thanking the Assemblymember for the opportunity to meet and express the sentiment that you look forward to a continuing dialogue in the future.

Contact Sheet: Complete the information at the bottom of the Contact Sheet and return a copy to CAPPs.

ALL SUBSEQUENT VISITS

The following is a list of activities you may consider to effectively maintaining contact with district legislators:

Invite the legislator to a luncheon meeting of five or more of your management team to discuss issues of mutual interest.

Offer to participate in the legislator's next fundraising event in the district: purchase one or two tables.

Offer to organize a small fundraiser for the legislator in a home of a local CAPPs Representative. (You should try to raise at least \$5,000.)

It is important to remain in contact with your local legislator and his or her local staff, but do not become a pest -- legislators are very busy. Make appointments only when you have specific business.

CAPPS Legislative Contact Sheet

Following your meeting with your State Legislator,
complete this worksheet and return a copy to CAPPS.

Name of School/College:

Name of School or College Representative:

Address:

City, State, Zip:

Phone:

E-mail:

Name of Legislator:

District Number:

Date of Meeting:

Comments:

(Please let us know what was discussed, what commitments were made by the legislator, (e.g., support for a specific bill), and what commitments were made by you.

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Comments:

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An Example of How One School Created A Legislator Contact Program

It's important and useful to develop and maintain good relationships with legislators and their staffs.

For effective legislative advocacy, it's absolutely vital.

As such, Success Education Colleges (SEC) created a Legislator Contact Program.

GETTING STARTED

SEC comprised a list of all the elected officials in the counties, cities, and districts where our campuses are located. Additionally we have also included the names of all of the elected officials in the counties, cities, and districts where the bulk of our students reside.

This list contains the following:

- The names of the elected officials
- The cities/county/district that they are affiliated with
- Political affiliation – Republican/Democrat (if applicable)
- Contact information (phone, email, mailing addresses)
- Assistant/Aide contact information (phone, email)

The list was easily assembled through internet search as well as drawing upon the existing knowledge of the College's Executive Committee and through communication with the lobbyist from CAPPS.

MAKING CONTACT

Making contact in some cases requires a bit of persistence and varies depending on the office held. The person making the initial contact will also vary depending on the office held as well as any possible personal connections to the official.

Remember also that these people are typically very busy, particularly during election season, so don't be dissuaded if you need to reach out multiple times before contact is made. Persistence pays off.

- The best option is a face-to-face meeting, but that may not always be possible. A phone conversation may have to do for the initial contact.
- Make a formal appointment; either in the district or at the state capital. Most legislators are willing to see constituents or advocates when they have the time.
- Reply on personal connections such as relatives, neighbors, and colleagues –these kinds of connections make a meeting much easier to arrange.
- Start by arranging a meeting with an aide.
- Give him a reason to meet you:
 - Ask him to speak at an event, or to present something: certificates, diplomas, awards.
 - Give the legislator an award for something good he/she has done, or for spearheading a bill that helped the issue or the community.
 - Ask him/her to explain the legislative process to participants, or to a meeting of practitioners.
 - Invite he/she to see something specific -- an exhibit, or a community problem.
 - Invite him/her to talk with a focus group
 - Get the media there

After initial contact has been made, give him/her a reason to come back.

- Thank him/her for the visit and his/her contribution, both at the time and later, by letter. Legislators use such thank-you letters to demonstrate their good work in the district.
- Invite him/her back to follow up on something specific.
- Invite him/her back to continue discussions with participants.
- Invite him/her back to preside or speak at a particular event or occasion.

It is also important to give him/her a reason to remember you.

- Give him/her something to take away -- an award, a photo, a fact sheet, a report or position paper, etc.
- Provide an unusual experience for them.
- Have people affected by your issue on hand to tell their own stories.

ESTABLISHING & MAINTAINING A RELATIONSHIP

One meeting doesn't make a relationship. As with any other relationship, we have to make an effort to get to know the other person, and develop mutual respect and understanding.

- Keep contact after the initial meeting. Call, write, or e-mail regularly with updates and new information.
- Try to talk to the same person each time
- If possible, meet face-to-face periodically, as well as by phone.
- Attend fundraisers and other events honoring the legislator.
- Ask legislators' and aides' advice -- and follow it when you can.
- Establish SEC as an absolutely reliable source of information. If we don't know something, say so, promise to find it out, and then do.
- Thank legislators for their help, publicly and privately, formally and informally, at every opportunity. Take every chance that we get to make them look good.
- Respect a legislator's or aide's limitations and priorities. If we're not sure how something will

affect him/her, ask before a decision is made about it.

- If we can't support he or she on a given issue, it's far better for the legislator to know they can always trust us to tell the truth, rather than to be unpleasantly surprised because we were unable to give them bad news. If he/she knows they can believe us when we disagree, they will also assume that what you tell them is true, rather than self-serving.
- Don't abuse the relationship. Don't ask for help unless we really need it. Don't be an annoyance: keep your contacts to a reasonable and businesslike level. Never demand -- ask if help is possible. And be understanding if the answer is no.

IN SUMMARY

Establishing relationships with federal and state legislators -- U.S. Senators and Congressmen, state senators and representatives -- and local officials can make our advocacy effort a great deal easier. If legislators answer or return our phone calls, trust your information, and are willing to go out on a limb for SEC, we are much more apt to reach our goals, whether they center on funding or legislation.

At the same time, developing relationships doesn't happen without effort. We have to understand who the key legislators and aides are, make initial contact with them, and then follow up over time.

Maintaining regular contact, getting personal when we can, establishing ourselves as both trustworthy and a reliable source of information, and respecting legislators' and aides' limitations and priorities will all help to win and keep their support.

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