

COMMUNITY ACTION AGENCIES

Turning Legislative Meetings into Strong Working Relationships

A 40-Minute Training for CAA Staff, Directors & Advocates

Today's Roadmap

40 minutes · 6 modules · Immediately actionable

01

Why Relationships Beat Transactions

5 min

02

Know Your Legislator Before You Walk In

7 min

03

The Meeting Itself — Structure & Strategy

8 min

04

Telling Your Story with Data + Heart

8 min

05

Follow-Through: Turning One Visit into Ongoing Access

7 min

06

Building a Legislative Engagement Calendar

5 min

MODULE 01

Why Relationships Beat Transactions

The foundation of effective legislative advocacy

Two Ways to Show Up at the Capitol

TRANSACTIONAL

- ✗ You show up only when you need something
- ✗ Each visit starts from zero — no context
- ✗ Staff treat you like a stranger
- ✗ Your requests get filed away
- ✗ Relationship ends when the session ends

RELATIONAL

- ✓ You are a known, trusted resource year-round
- ✓ Staff know your name — calls get returned
- ✓ Your data shapes the policy conversation
- ✓ Requests carry weight and credibility
- ✓ Access compounds over multiple sessions

Your CAA Has a Unique Legislative Asset

Community Action Agencies serve residents in EVERY legislative district.

That makes you a constituency, not just a charity.

Local Presence

Your programs touch constituents in their backyard. Legislators pay attention to what's happening at home.

Real Data

You have numbers — poverty rates, utility shutoffs, families served — that abstract policy reports can never match.

Human Stories

You have permission to share client stories (with consent) that put a face on policy outcomes.

Neutral Credibility

CAAs are community institutions, not partisan actors. That's rare — and valuable — at the Capitol.

MODULE 02

Know Your Legislator Before You Walk In

Research turns strangers into allies

The Pre-Meeting Research Checklist

30 minutes of prep = 10× more productive meeting

BIOGRAPHY

- Party, years in office, committee assignments
- Professional background before politics
- Past votes on poverty, housing, LIHEAP, childcare

PRIORITIES

- Recent press releases, newsletters, social media
- Legislation they've sponsored related to your work
- Campaign promises relevant to community needs

DISTRICT

- Poverty rate & unemployment data in their district
- How many people your CAA served there last year
- Any major employers or industries — shared economic interests

RELATIONSHIPS

- Have they visited your CAA or programs before?
- Do any board members or clients know them personally?
- Is there a shared church, civic group, or local tie?

Map the Power: California Committees That Matter to CAAs

Budget & Fiscal Review (Senate) / Budget (Assembly)

Sets CSBG, LIHEAP, and state anti-poverty appropriations.

HIGH PRIORITY

Human Services

CalWORKs, CalFresh, childcare, and safety-net program policy.

HIGH PRIORITY

Housing & Community Development

Homelessness, rental assistance, and affordable housing programs.

HIGH PRIORITY

Labor, Public Employment & Retirement

Workforce development, job training, and minimum wage policy.

MEDIUM

Education / Early Childhood

Head Start, state preschool, after-school, and family literacy.

MEDIUM

Agriculture

CalFresh outreach, food banks, and rural poverty programs.

MEDIUM

MODULE 03

The Meeting Itself — Structure & Strategy

How to make every minute count

The 15-Minute Meeting Framework

Most legislative meetings run 15–20 minutes. Structure yours deliberately.

Min 1–2 BUILD RAPPORT	Reference something specific about them — a vote, their district, a shared connection. Never start with your ask.
Min 3–5 FRAME THE ISSUE	One crisp problem statement. Use local data. 'In your district, 4,200 households can't afford to heat their homes this winter.'
Min 6–10 SHARE YOUR STORY	One client story (with consent) + your program's role. Connect emotionally, then anchor with numbers.
Min 11–13 MAKE THE ASK	Be specific: co-sponsor HB 1234, add \$X to the budget, attend your community event. One clear request.
Min 14–15 CLOSE + FOLLOW-UP	Confirm next step: 'Can we send you our one-pager?' Exchange cards. Thank staff warmly — they have long memories.

What to Bring to Every Legislative Meeting



The One-Pager

One page only. Problem, your data, your ask, your contact. Leave it — they will never read a packet.



District-Specific Data

Numbers from THEIR district. National stats don't move legislators. Local numbers do.



A Client Story

One story with explicit client consent. Anonymize as needed. Keep it to 2–3 sentences in the meeting.



A Clear, Specific Ask

Not 'support poverty programs.' Instead: 'Co-sponsor SB 456 by March 15.'



Your Business Cards

Give one to the legislator AND their staff. Staff manage the legislator's calendar and memory.



An Invitation

Invite them to tour your facility or attend a community event. Seeing is believing.

When Things Get Difficult

Prepare for these scenarios — they happen more often than you think

Situation: "I only have 5 minutes."

✓ **Response:** "Absolutely — here's the one thing I need you to know: [single stat + single ask]. May I send you our one-pager afterward?"

Situation: They disagree with your position.

✓ **Response:** Don't argue. Say: "I respect that, and I'd love to share what we're seeing on the ground. Could we schedule a site visit?"

Situation: They pass you off to staff.

✓ **Response:** Great news — treat it as an opportunity. Staff handle most policy work. Build a real relationship with them.

Situation: They make a promise they probably won't keep.

✓ **Response:** Thank them, document it, and follow up within 48 hours with a written summary of "what we discussed."

MODULE 04

Telling Your Story with Data + Heart

The formula that moves legislators to act

The Advocacy Equation

DATA

Proves the
scale of need

"4,200 households
cannot afford heat
this winter."



STORY

Makes it real
and urgent

"Maria, 67, chose
between insulin
and heat in January."



ACTION

The legislator
is moved to
act on your
specific ask.

Making Your Data Land

- Use YOUR district numbers, not state averages
- Translate to relatable units: 'That's 3 classrooms of kids'
- Show trend over time — is it getting worse?

Making Your Story Land

- Always get written consent from the client
- Use first name and minimal identifying detail
- One story well-told beats three rushed ones

Anatomy of the Perfect One-Pager

Legislators' offices get hundreds of leave-behinds. Make yours the one they keep.

HEADER: Your CAA logo + agency name + contact info

THE PROBLEM: 2–3 sentences with your strongest local stat

YOUR IMPACT: What you do + numbers served in their district

THE GAP: What funding/policy change is needed and why now

THE ASK: Specific, dated, actionable request (one sentence)

CONTACT: Name, phone, email — who to call tomorrow morning

FONT SIZE

Minimum 11pt. If it feels too big, it's probably right.

WHITE SPACE

Legislator offices read these in seconds. Breathe.

LANGUAGE

Zero jargon. Write for a curious 10th grader, not a policy wonk.

VISUALS

One chart or photo maximum. Keep it clean.

LENGTH

ONE PAGE. Never two. Print on quality paper.

MODULE 05

Follow-Through: Turning One Visit into Ongoing Access

The meeting is the beginning, not the goal

The 48-Hour Follow-Up Protocol

What you do in the 48 hours after determines whether the meeting mattered.

Same Day

Send a thank-you email

Reference something specific from the conversation. Attach your one-pager if not left behind. CC their staff.

Within 24 Hours

Send any promised materials

If you said 'I'll send you our annual data,' do it immediately. Nothing kills credibility like forgetting.

Within 48 Hours

Debrief with your team

Write up what was said, what was promised, what follow-up is needed. Put it in a shared document.

Within 1 Week

Thank the staff person separately

A brief personal note to the scheduler or policy staff goes a long way. They remember who treats them well.

Within 30 Days

Send a relevant update

New data? A client success story? Policy development? Become a resource, not just a visitor.

Staying on the Radar Year-Round

Relationships require consistent, low-maintenance touchpoints between sessions



Monthly E-Update

A brief email with one data point, one story, one upcoming event. Under 200 words.
Consistent.



Invite to Tours

Nothing builds credibility like seeing your work in person. Offer site visits before session, not during.



Celebrate Wins Together

When legislation passes that you supported, acknowledge their role publicly and privately.



Public Recognition

Annual awards, newsletter spotlights, press releases thanking supportive legislators — they notice.



Annual Impact Report

Send a district-specific version of your annual report with a personalized note every spring.




Constituent Connections

When clients or community members reach out to legislators on their own, that's proof of your community roots.

Build Your Legislator Relationship Database

Legislator	District	Committees	Last Contact	Key Interest	Next Step
Sen. A. Johnson	SD-14	Appropriations, HHS	Jan 15	LIHEAP, seniors	Send data update
Rep. M. Torres	HD-32	Housing, Budget	Dec 8	Housing insecurity	Invite site tour
Rep. K. Williams	HD-11	Education, Labor	Nov 20	Workforce dev.	Schedule meeting
Sen. D. Chen	SD-7	Ag, Rural Affairs	Not yet	Rural poverty	Schedule first mtg

 **Tip:** Use a shared Google Sheet, Airtable, or simple CRM so multiple staff can contribute. The relationship belongs to the organization, not one person.

MODULE 06

Building a Legislative Engagement Calendar

From one meeting to a year-round strategy

The CAA Legislative Engagement Calendar



JAN	FEB	MAR	APR
Pre-session meetings + deliver annual data	Testify on budget proposals	Follow-up on committee assignments + bills	Site visit invitations; session ends — debrief
MAY	JUN	JUL	AUG
Send spring impact data; thank-you notes	Host community event; invite legislators	Share summer program outcomes + stories	Annual report distribution (district-specific)
SEP	OCT	NOV	DEC
Start pre-session research; update legislator database	Schedule next session meetings (calendars fill fast)	Election results: update contact list, congratulate	Holiday card + year-in-review; finalize visit schedule

 Legislative Session

 Active Engagement

 Relationship Maintenance

Show Up: Attending Local Events of Elected Officials

Visibility builds relationships. Showing up at town halls, ribbon-cuttings, and community events keeps CAAs top-of-mind year-round — not just at budget time.

Town Halls

RSVP, attend in CAA shirt or name tag, ask one prepared question.

District Office Hours

Drop in during open hours — bring a one-pager, not a long ask.

Parades & Festivals

Staff a booth; invite local officials to walk through and meet clients.

Press Conferences

Attend as a visible stakeholder; offer a quote on local impact.

Ribbon Cuttings

Show up for openings of housing, child care, and service sites.

Community Forums

Volunteer to moderate or host poverty-focused panels in your region.

Award Dinners & Galas

Buy a table when budgets allow — face time is the deliverable.

Holiday & Service Days

Join MLK Day, volunteer drives, food distributions hosted by their office.

Be Part of It: Supporting Their Fundraising

CAAs (as 501(c)(3)s) can't donate or endorse — but staff, board members, and allies can engage personally. Know the line.

Attend in Personal Capacity

Board members and staff can attend events on their own time and dime.

Host a Meet & Greet

Board members can host coffees or house parties at their own homes.

Bundle Personal Donations

Encourage your network — friends, family, board peers — to give personally.

Show Up at Their Fundraisers

Personal attendance signals support; bring your spouse or a board friend.

Buy a Ticket

Personal contributions to campaigns/PACs are legal — never from CAA funds.

Volunteer on a Campaign

Off-the-clock canvassing, phone banking, and event staffing builds equity.

Sponsor Through Allies

Partner businesses and foundations can sponsor where CAAs can't.

Know the 501(c)(3) Line

No org funds, no org endorsements, no using CAA email or letterhead.

You're Stronger Together: Coalition Advocacy

Legislators pay more attention to 10 organizations saying the same thing than to 10 organizations saying 10 things.

United Way

Shared data systems, donor relationships, budget advocacy

Head Start Programs

Early childhood funding, family support services

Faith Communities

Constituent connections, moral authority, volunteers

SEAA / NAACP

Civil rights, equity, community voice

Food Banks

Hunger/SNAP issues, rural poverty, emergency assistance

Housing Authorities

Rental assistance, shelter, weatherization

Healthcare Providers

Medicaid, behavioral health, social determinants

Business Community

Workforce development, economic impact, bipartisan reach

10 Mistakes That Undermine Legislative Relationships

1 Going only when you need something

2 Leading with the ask instead of the relationship

3 Bringing vague or generic asks ('support community needs')

4 Showing up without research on the legislator

5 Ignoring or being rude to staff

6 Sending a 10-page packet instead of a one-pager

7 Making promises you can't keep

8 Only talking to legislators who already agree with you

9 Failing to follow up after the meeting

10 Not tracking contact or conversations over time

Your 90-Day Action Plan

Leave today with a concrete next step in each area

DAYS 1–30

Build the Foundation

- Map the 5 most important legislators for your service area
- Assign a relationship lead for each legislator
- Create or update your one-pager with current data
- Update your legislator contact database

DAYS 31–60

Make Contact

- Request meetings with your top 5 legislators
- Send district-specific data to each before meeting
- Conduct and debrief your first round of meetings
- Send all follow-up materials within 48 hours

DAYS 61–90

Sustain the Relationship

- Set up a monthly e-update calendar reminder
- Schedule one community event or site tour invitation
- Review your engagement calendar for the next quarter
- Identify 3 coalition partners for joint advocacy

Core Messages Every CAA Advocate Should Master

"Community Action is your most cost-effective investment."

Every dollar of CSBG generates \$X in economic activity. Frame the ask as ROI, not charity.

"We serve your constituents — and they vote."

CAA clients, board members, and volunteers are voters in their district. Make the political case explicitly.

"Our model is local government, not bureaucracy."

CAAs are governed by tripartite boards including elected officials. You're part of the public sector ecosystem.

"We've been here 60 years. We'll be here when trends change."

Stability and longevity matter to legislators. You're not a fly-by-night nonprofit with a 3-year grant.

"We see what the data misses."

Human services data often lags 1–2 years. Your on-the-ground intelligence is timely and irreplaceable.

Key Takeaways

1 Relationships beat transactions — invest in them when you don't need anything.

2 Research before every meeting — know their district, committees, and priorities.

3 Structure your meet-ups — rapport, data, story, specific engagement, clear next step.

4 Data + story = action. Neither works as well alone.

5 Follow through within 48 hours — that's what separates memorable advocates.

6 Year-round engagement turns annual visitors into trusted advisors.

The Work Doesn't Start at the Capitol.

It starts with the first email you send tomorrow morning.

Your Next 3 Actions

1. Identify the 5 legislators most important to your CAA this session
2. Schedule one meeting request email for this week
3. Update your one-pager with current, district-specific data

Questions & Discussion