

What to Expect...

When setting an appointment with your local legislator

Congratulations on taking the first step toward participating in the legislative process! Meeting with your local legislator helps CAI-CLAC to solidify the message we carry in Sacramento by bringing it into the local, district offices, as well. To assist you in setting and having successful appointments, we offer the following tips about what to expect:

1. Legislators are the people's voice in the state capitol. When you go to meet with your legislator (or their staff), you are going to meet with an individual whose job is to listen to their constituents (of whom you are one).
2. Check out their website and get on their email list. This will keep you informed of what is important to them, what they see is important to their constituents and when they are having town-hall meetings, meet-and-greets, etc.
3. Legislators usually schedule appointments with constituents in their local (district) offices on Fridays when they have returned from Sacramento. Have a list of Friday times that you, and anyone attending the meeting with you, have available ready for when you call to make your appointment.
4. Do NOT be upset if your appointment is not with the legislator him/herself. It is the "staffers" that do most of the research and advise the legislator. Becoming a resource for the office is our ultimate goal, and staffers are often around longer than the legislators are.
5. Confirm the day before not just the appointment, but with whom you will be meeting. Legislators' schedules are constantly changing, and things may need to shift last-minute.
6. Before the appointment, collect the items you would like to take with you (see What to Take...). In an effort not to overwhelm the legislator or their staff member(s), plan on handing them the top five items. Be prepared with the other items as you see fit, so if they come up in conversation, you will have them available to show to the legislator and their staff. Don't worry if you don't have something with you for this meeting. It is an excellent excuse to return to their office at a later date, and begin building a relationship with the people in the office.
7. Once you have your items compiled, make sure you have enough handouts to give the legislator and one or two of their staff, as well as the people attending the meeting with you including yourself. While you don't want to be reading off a piece of paper to present CAI-CLAC's mission and/or position on a particular issue, you should have a resource on your topic(s) in front of you to help guide the conversation.
8. Before the appointment, have a meeting or conference call with the other people involved in the meeting, and decide who will be the "point person." It is often easier for the legislator to follow if they have one main person to listen to, with "color" (examples and small, short add-ins) added by the other attendees. If there is a person who has already begun a relationship with the legislator or staff, they would be the ideal person to take "point."

9. The day of the appointment, dress professionally and arrive early, and make sure that you have all of your members before you walk into the office. Get your materials ready to hand out, and each person should have their business card ready to hand out as well. Everyone should arrive having reviewed the main points of their discussion in advance.
10. When the meeting begins, be sure to get the business cards of everyone in the meeting.
11. In the meeting, begin by asking if the legislator or staffer(s) have ever had experience with a community association or HOA. Based on that information, you will have an idea of how much background you will need to give regarding common interest developments (CIDs) before addressing your main point.
12. Stick to the point! This is not the time to go into everything that you want to see changed in the CID industry or other matters at all. CAI-CLAC has no political party affiliation, we are here to represent the CID industry and be known as the resource for CID matters. Make your point, illustrate the point, and ask if there are any questions. Make a note of questions that you cannot answer, and promise to follow-up with a response.
13. Take a photo with the legislator and/or staffer(s). You will use this to send to the CAI-CLAC PR Committee (with names of attendees), and you may also wish to provide it to the legislator in your follow-up.
14. Follow up! After the meeting, be sure that each of you send an e-mail or a hand-written note to those who attended the meeting, thanking them for their time. If there were any questions that needed follow-up, or additional materials you wanted to provide to them, this is a good time to do that as well.

If you have any questions, or would like to find people to go with you to a local legislator's office, contact your local CAI Chapter Office or Legislative Support Committee. Thank you for helping CAI-CLAC be the community association industry's voice in Sacramento!

Visit www.caiclac.com for more information, or call Wendy Van Messel at office@caiclac.com