

JUSTICE IN AGING

FIGHTING SENIOR POVERTY THROUGH LAW

Legislative Advocacy 101: Prepare for California's Upcoming Legislative Session

Webinar Transcript

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Yasmin Peled:

Hello, everyone, and welcome to today's webinar, Legislative Advocacy 101: Preparing for California's Upcoming Legislative Session. I'm Yasmin Peled, director of California Government Affairs at Justice in Aging. Today, I'm joined by Lorin Kline and Reann Pacheco from the Legal Aid Association of California.

Before we get started, I do just want to acknowledge and send all of our support to those of you in LA. Hope that you and your loved ones are safe during this really difficult time. If there's anything that we can do to support you, just please let us know.

Getting started on some logistics. Before we begin, I just want to remind folks that you are all on mute, but we welcome participation in today's presentation through the Q&A function in the Zoom control panel. Also available in the Zoom control panel is the closed captioning button, which enables closed captioning. That's the CC button in the bar. I'll be watching the participant questions as they come in throughout the webinar, and I'll uplift high-level themes during our Q&A segment at the end of today's presentation. Any unanswered questions in today's webinar will be addressed via email following the conclusion of the presentation. You can also use the Q&A function to request technical assistance with Zoom, and our staff will do their best to assist you.

This webinar is also being recorded. After the conclusion of the webinar, the slides and the recording will be available on our website and will be emailed to all the registrants. Appreciate folks also participating in a post-webinar survey that will pop up at the conclusion of today's webinar.

Quickly, just about Justice in Aging, Justice in Aging is a national organization that uses the power of law to fight senior poverty by securing access to affordable healthcare, economic security, and the courts for older adults with limited resources.

Lorin Kline: Hi, everyone. I'm Lorin Kline. I'm the director of Advocacy at the Legal Aid Association of California or LAAC. I'll just tell you a little bit about LAAC before we get started. We're the statewide membership organization for legal aid nonprofits, so we represent more than 100 nonprofits that provide free civil legal services across the state. We do a number of things to support those organizations, including training, coordination, and advocacy including legislative advocacy, which you'll hear about today. Our legislative advocacy is focused on speaking on behalf of the entire legal aid community on any issues that impact how they do their work or the entire system of the provision of free legal services.

Yasmin Peled: Lorin, I just want to quickly touch on Justice in Aging's Advancing Equity initiative. Justice in Aging is committed to advancing equity for low-income older adults in all of our issue areas. We strive to address the enduring harms and inequities caused by systemic racism and other forms of discrimination that uniquely impact low-income older adults in marginalized communities.

Reann Pacheco: Then, hi, everybody. Really quickly, my name is Reann Pacheco. I'm with LAAC, and I'm the senior advocacy coordinator. A really great way to get access to some of our resources and some of our trainings and materials is through our website. So you can go to justiceinaging.org or you go to laaonline.org.

Yasmin Peled: As we get started, we want to get a feeling of the folks in the virtual room with us today, so we've got a couple polls that we'd like to ask some questions of you. So if, Shelby, you could launch the first poll. We'd like to know your experience with legislative and budget advocacy. Would you rate yourself very experienced, medium experience, or little experience with legislative advocacy? We'll just wait a minute or so here for folks to fill out the poll. It looks like we've got about a majority of folks with medium to little experience and a few folks here that feel very experienced. So that is great. We hope that everyone finds this information useful to your work for the coming year. Again, questions that don't get answered today, we'll get back to everybody offline.

Just a few more questions for folks. The second is that we'd like to know if you work at a Legal Services Corporation, LSC, funded program. So if folks could please answer that yes or no question. Let's see the results. Most folks, not at an LSC-funded org. That's helpful since we're going to go over some of the rules for those organizations later on in the day.

Then lastly, what are you most interested in getting more experience in or learning more about today? Are you more interested in getting information on policy advocacy, budget advocacy, or both policy and budget advocacy? Let's see the results. Mostly everyone's interested in getting a little bit of both. So that's great. We will cover both in this training. So let's get started. I'm going to turn it over to Lorin to get us kicked off with a review of the legislative calendar.

Lorin Kline:

Thanks for taking the time to answer those poll questions, everyone. That'll help us give the info that you most want. We're going to get started by talking about the legislative calendar. We thought that'd be a great way to get started because California has a very prescriptive budget and legislative calendar. It's laid out in the Constitution, so the whole process is really guided by this calendar.

There are two different parallel processes, one for budget advocacy and one for policy advocacy with a different timeline for each, which we'll go over, but they follow the same general path. Budget items and policy bills have to go through committees where they're heard in hearings. The entire legislature has to vote on them before they can become law. Like I said, we're talking about two different timelines, so we'll go through those one by one.

We'll start out by talking about the timeline for budget. The state's budget runs on a fiscal year that begins on July 1st. So right from the time the fiscal year begins, budget work for the next year gets started. Throughout the fall, state agencies and organizations are figuring out their budgets proposals for the following year, and the administration is getting started on drafting their budget for the following year. An important thing to know about the state budget is that it's ultimately a negotiation and an agreement between the governor and the legislature. At the end of the day, the governor, the speaker of the Assembly and the president pro tem of the Senate, who you'll sometimes hear those referred to as the big three, will come to a final agreement on the budget. So the budget process involves those parties figuring things out.

Things really get kicked off in January. On January 10th, the governor releases his proposed budget. He unveils his first draft plan of the state budget. This is usually accompanied by a lot of fanfare, big press conferences, a lot of media. That was not true this year because of the fires in LA. But usually, you'll see a lot of press around the governor releasing his proposed budget. When his proposed budget comes out, the process in the legislature really kicks off.

February to April, there will be a number of hearings on the budget. If you've ever participated in LAAC's Legal Aid Day in Sacramento, it always takes place during that window of time when all of the budget hearings are happening. Each house of the legislature has a budget committee, and each of those committees has a bunch of subcommittees that are divided based on subject matter. Those subcommittees will hear budget items and hearings all throughout these three months. This is a great place to be doing your advocacy. You want your budget item to be on an agenda for one of those hearings. This is when the legislature really figures out what they want to be in their draft of the budget.

On May 14th, the governor releases a revised budget plan. This is often referred to as the May Revise. This will be updated from the January budget based on a number of factors. There will be updated revenue estimates which will change the governor's draft. Advocacy that has taken place between January and May

may impact the May Revise, as well as what's happening in our world. Like a big wildfire, for example, may really impact what the governor includes in his budget.

After the May Revise comes out, it's the home stretch for budget advocacy. There will be final hearings and negotiations in the legislature and negotiations between the governor and his administration themselves and the leaders in the legislature to come to a final agreed-upon budget. This has to pass in the legislature by June 15th. Once it passes, ultimately the power ends up back with the governor again. He has a line-item veto for the budget and can blue pencil items out of the budget that the legislature has passed. That doesn't happen super frequently, but it does happen. We have experienced that in our own advocacy. But once that happens, the governor will sign the budget, the budget is final, and a new fiscal year begins again on July 1.

The legislative calendar for policy bills runs on a bit of a different timeline. When the legislature goes into session in January, this is when legislators will start introducing tons of bills. So we're in the time right now where tons of bills are being introduced. This happens throughout January and February. The Legislative Counsel's Office has to review and finalize budget or bill language, excuse me, before it goes into print. So the first deadline you'll see is January 24th. That's the deadline to send bill language to Legislative Counsel. Then by the end of February, February 21st, any bills that are going to be introduced must have been introduced.

March and April is when there will be a lot of policy hearings. Every bill that gets introduced is assigned to a policy committee which will be based on what the bill is about based on its subject matter. So it could go to Judiciary Committee, it could go to Housing Committee. Whatever the case may be, the bill will be heard in a hearing by that committee.

In May, bill move... bills that survived their policy committee and passed. Any bill that has funding attached to it has to go through a second policy committee called the Appropriations Committee. If a bill does not cost any money, it doesn't have to go to appropriations. Appropriations is where a lot of bills in California get held up. A ton of bills go through and don't make it. But for the bills that do, the bills will go to a floor vote in the house that they were introduced. If they pass, they move on to the next house. June 6th is the deadline for bills to pass in the house that they were introduced. They must make it into the next house by then.

June and July, this process starts over again in the other house. A bill's assigned to a policy committee, sometimes two policy committees. Hearings are held. Some bills pass; some bills don't. Again, bills have to go to Appropriations and finally will go to the floor for a vote. You can be advocating at all of these points in this process during hearings, in between hearings, before floor votes happen, etc. In September, September 12th is the deadline for bills to pass out of the

legislature and go to the governor's desk. Then the governor's got about a month to either sign those bills or veto them.

Reann Pacheco:

Thanks, Lorin. I'm going to get us started on some strategies. I'll first discuss budget, and then later on we'll talk about legislative advocacy in further detail. When it comes to budget advocacy, it's a really great idea to start early. You can start as early as July because that's when departments and agencies are drafting their budgets and you can advocate for them to include you. But October and November is also a good time to start. Even if those conversations aren't going so well and they say it's too early or it's a bad budget year, it's still a good idea to get in their ear and be consistent.

Also, unfortunately, your job doesn't end at the legislature. It's going to be really important for you to meet with and engage with administration staff since they ultimately will have the final say. Then your budget proposals can be introduced at the legislative process, but it will require that you have a budget champion. So get to know the legislature and their interests, especially since we have a lot of new folks coming in that came in this year. It's another good reason to start these conversations early, especially if you're looking for a champion, in the search of a champion.

If you are running a policy bill and it requires funding, you should be prepared to run the bill with a corresponding budget ask. Meaning, you should be talking to budget staff and finance and be prepared to answer some tough questions, like how exactly you came up with your ask and where can the money come from. But overall, we recognize that the process can be difficult to track, and Lorin can give some more insight on how it has changed over the last 10 years. [inaudible 00:16:00]-

Lorin Kline:

I just wanted to add about the process being a bit opaque. The budget process in California has changed a lot. I've been doing this work for about 10 years, and things are quite different now than they used to be. Things were a lot more formal in the past. There would always be big budget committee hearings, and there would be a conference committee hearing where the two houses of the legislature would really hash things out and come to an agreement. But more and more, these conversations are happening behind closed doors and not in an open hearing. I think that the pandemic had a little bit to do with that when people couldn't come in person to the legislature anymore. Less hearings started to happen. It's just the way the process has evolved.

So as an advocate, it becomes more and more important that you really build your relationships with folks at the legislature, especially staff, because if there's not going to be an open hearing where you can voice what you're trying to have included in the budget, you want staff to be on your side. So every budget committee and every budget subcommittee has their own staff, and those staff are usually assigned certain issue areas. For example, LAAC knows very well the staffer in the Senate, in the Assembly that handles judiciary issues on the

particular budget subcommittee that handles the judicial branch budget because they are the folks that hear legal aid issues and legal aid funding. So you want them to know who you are, you want them to know what you're fighting for because that's how your voice will get heard in this more opaque process.

Yasmin Peled:

Then shifting into legislative advocacy, the other track that folks can participate in, there are two main opportunities here. An organization can either be a sponsor or a co-sponsor of legislation, or you can just be taking a position on a bill.

Starting with what sponsorship means, that's a higher level of engagement. Your organization is usually, or with partners, coming up with a first draft of language and you're working on that with the Legislative Counsel. Then you're also building the coalition around your issue or your bill. You're spearheading the letters. You're doing the first draft of those, making the sample letters that other organizations will use to base their letters on. You're the organization that's in charge of doing the main lobbying for the bill. You're likely going to be the key person testifying in committee and also coordinating with the various stakeholders. I say all of that because sponsorship is a lot of work, and that's maybe not the first place you want to always start if you're new to legislative advocacy.

The other route is taking positions on bills. This, you have a wider range of options in terms of your engagement. You can be supporting bills. You can be opposing a piece of legislation. You can also be suggesting amendments. When you're taking this route, you're keeping track of bills, you're submitting your position letters. Maybe you're attending some meetings, especially if you're in opposition to a bill or if you have amendments, that the author of the bill may want to meet with you or the committee staff may want to meet with you to further understand your position.

You may also want to be going to bill committee hearings to provide what's called, quote/unquote, Me Too's, where you're not the main testifier on a bill. But after the testimony has been provided, anyone who's in support or in opposition can come up to the mic and say the name of your organization and the position that you have on the bill. That way it's stated for the record. This is definitely a lower level of engagement, but you could take positions on lots of bills. There's no limit to how many bills you want to take a position on. Whereas sponsoring legislation, there's no limit to how much you could sponsor, but there's a limit on how much time you have and how much you want to be doing all of that work.

How do you run a bill? Again, like in budget advocacy, you want to start early. You want to be identifying a policy solution to a problem. I know that many of you on this webinar today have a lot of experience working with clients and in

the community. You are seeing firsthand the problems that need solving, and so you can come up with these policy solutions.

You'll next need to work on legislative language, which could require some research into the existing law. Then you will also need to draft a fact sheet that you can use to pitch this idea. The fact sheet should aim to be less jargony and able to really explain this issue and your policy solution to more of a lay person because some of the staff in the Capitol are really, really knowledgeable on certain policy areas, and some staff members have to cover a really wide range of issue areas, and so they might not be experts on the issue that you are bringing to them. So it's good to have your fact sheet be a more approachable document.

It's also really nice to work with a team when you're sponsoring a bill so that way you can spread the work around. So maybe there are other organizations that would be interested in working on this policy issue that you've identified. There's also maybe a more experienced advocacy organization that you want to work with, especially if it's your first time working on a bill.

Then once you've done all that, you've got to get out there and start talking about your idea. Legislative offices really actually are pretty approachable. A staff person will almost always take a meeting with you. It's always nice if you have an existing relationship with a legislative office. That can be a good place to start. Even if you don't have a pre-existing relationship, you can call pretty much any legislative office and get the email of the staffer who works on your issue area. Let's say you have a bill that is a judiciary issue, you can call up the legislator's office and say, "Hi, I'm wondering who staffs judiciary issues for your boss." They'll tell you the name of that person. Then you can email them to schedule a meeting, send them the fact sheet, and say, "Hey, we'd like to work with you on this."

After you have that initial pitch meeting, if a legislative office decides that they want to work with you on a bill, then you're really off to the races. You're plopped right into that legislative process that Lorin outlined up top, and you just move along that schedule. Again, you're not doing it alone. You'll be working with the legislative aid that's in the legislator's office. They're experts in the process, and so they're helping to move you along. Every office works a little bit differently in terms of deadlines and the way that they like to do things. But you're just moving along through the process just like everybody else.

Again, just a final reminder that if you are working on a bill that has a large cost, in addition to doing the bill, you really do need a budget request. This is another one of these changes that has happened in the last 10 years like Lorin described. You really need a budget request to go along with a bill that has a big ask, or else you're much more likely to end up getting vetoed at the end of the day.

We wanted to show a couple screenshots of some of the ways that you do this advocacy. Remember that one of the key parts of the legislative advocacy, whether you're sponsoring a bill or just taking a position, is that you're submitting a lot of letters. The legislature actually has a pretty streamlined process these days. All letters need to be submitted via this advocate portal. There's a link here. Everyone's going to get these slides in follow-up, and so you'll have all these hyperlinks. This is a screenshot of the home page. If you don't already have an account, you'll need to make an account. Then you would just sign in here.

Once you've signed in, this is a screenshot of what it looks like inside of the portal. You will actually be able to see a list of every letter you've ever submitted, so that's a nice record-keeping. Then right up here in the left-hand corner where it says Submit a Letter, you would click that, and then there's a form that you fill out in. You attach the PDF. You type in the name of the letter. You say what committee you want to send it to. It's a pretty simple process. You need to submit letters through the portal. Staff will not accept the letters via email anymore.

Then lastly, you might be wondering, "Okay, well, how do I even look up a bill?" Well, this is the website that I probably use the most throughout the year. This is the official California Legislative Information lookup page. You can see here that you can either search for bills or you can do a code search. The other thing that I really like about this website is that if you click here to Bill Information, you get the full search function, and you can actually look up bills from prior years. So in your bill research/policy research phase, that can be a really helpful tool to look back and see what bills maybe got worked on similar issues in prior years. So this is a really useful website. Moving on, we're going to talk about some examples. So I'll let the LAAC folks cover this first example.

Lorin Kline:

We just wanted to give you an example of what a budget ask looks like that's not attached to a policy bill, and legal services funding is the perfect example of that. That's something that LAAC does in most years is advocates for legal aid funding. The primary source of state funding for legal services is something called the Equal Access fund. It's just a line-item in the judicial branch budget. So when we're seeking an increase to those funds, we run it purely as a budget ask. There's no bill related. We will be working early in the budget process to find a champion for that ask.

Reann mentioned, you really need to have a champion of your budget ask. You can't just push it on your own. It's never going to end up on an agenda at a subcommittee hearing. Folks won't want to meet with you about it unless there's some legislator that is championing the ask. So once you found that champion, then you start moving through the budget process. Again, no actual bill attached to it because this will just end up in the budget bill. We'll run an Equal Access fund increase, for example. It gets heard in a specific budget

subcommittee in both houses. You work in partnership with your champion and move through the process that way.

The budget bill does have language in it that can describe how the funding should be administered, so you will work on some bill language. For example, in past years, we've advocated for Equal Access fund increases that are about specific issue area work that's funding that's dedicated to homelessness prevention or dedicated to consumer legal services. We will draft a little bit of language that ends up in the budget bill that explains this newly appropriated funding specifically to do homelessness prevention legal services. Not a lot of language can be in the budget bill itself. You can't be making a ton of policy with that language. That's not proper. But there can be language in the budget bill that guides how the appropriated funds should be used.

Yasmin Peled:

Thanks, Lorin. An example of something that's been both a budget ask and a policy bill is an issue that Justice in Aging has been working on the last few years to create an older adult rental assistance program. Each time that we've introduced this idea, which was most recently a bill, SB-37, we've also needed to move a budget request as well. So we've had different budget requests over the years as we've sort of changed the proposal. But last year we were advocating for a \$25 million budget ask in addition to the policy bill. So SB-37 was moving through the process, moving through its policy committees, and we also needed to be working with budget staff and legislative champions to make sure that that budget request was also moving through the process. That typically means the legislative champion is writing a letter to the chair of the budget committee and also the leadership of the house, whether they're in the Assembly or the Senate.

Then like Lorin said, again, the budget side of things is usually pretty opaque, so you're just trying to mostly have conversations with legislative staff and the budget staff to try and keep your budget request alive through the process while your policy bill is also moving through its policy committees.

Then an example of something that's just a policy bill is that, a few years ago, Justice in Aging worked on a bill that would require California to become a Medicare Part A buy-in state. The details here don't matter for the purposes of this webinar. But overall, it would allow California to streamline enrollment for Medicare enrollees into something called the QMB program. Again, I won't get into the weeds here, but for the purposes of this example, this bill didn't have any fiscal cost to the state. It actually ended up saving the state money. So we didn't need to worry about having a budget request, finding a budget champion, working with budget staff in addition to legislative staff. We were just working with the policy committee staff. So in the Senate we were working with the Senate Health staff, in the Assembly, we were working with the Assembly Health staff, and it just moved through the process very smoothly. So that's an example of all three ways that this can work. So we'll move on now.

Reann Pacheco: Like we polled earlier, I know there are not a lot of LSC-funded organizations in the room, but I'm going to quickly go over some key roles. Because even if you're not LSC-funded, it's still important to know these things because maybe one day you're going to be in coalition, taking meetings together, so you might want to be a little bit more careful with them in the room.

LSC organizations are not allowed to lobby, but if you aren't making a ask, then you aren't lobbying and you can focus your conversations on legislator education, talk about the great work you do for their district, let them know that they could tell their caseworkers that you're a resource to them and express some gratitude. But don't forget, if you're an LSC org, you can lobby on your own state funding. Then if you're an LSC org that want to discuss any legislation, you'll need an Invitation to Comment Letter. LAAC collects these letters every year so you can reach out to us, and we can let you know what we have and don't have. But if you are not an LSC-funded org, it's good to get into the habit of asking for these letters in the beginning because LSC orgs cannot ask themselves. So if you're running a bill, just try to get that in in the beginning. Then once again, if you are advocating for your own state funding, you do not need a letter.

Lorin Kline: I would just add that if you do work at an LSC-funded organization, just make sure you're talking to your executive director about any legislator education or lobbying that you may want to do. It's totally up to your organization to decide for themselves what is lobbying, what is not lobbying, where they personally want to draw the line. So it's just important to make sure you're talking to your supervisor or your executive director about any advocacy that you're wanting to get involved in.

Yasmin Peled: We wanted to share some resources on lobbying rules. We're not going to get into the nitty-gritty of lobbying rules in this presentation, but we wanted to be sure that you all had resources in the follow-up. The Alliance for Justice, their Bolder Advocacy program, excuse me, is probably the most useful guidance here in California for nonprofits on lobbying rules. They have really detailed resources for nonprofits. So we've linked two of their guides here, Practical Guidance: What Nonprofits Need to Know about Lobbying California, and then also Understanding California's Lobbying Disclosure Rules.

Also, I'll make a plug in general, the Alliance for Justice folks are happy to answer questions from anybody. They're very easy to reach out to if you want to schedule a meeting with them or if you want them to come and do a training for your organization. Their Bolder Advocacy program is a really important resource for all of us here in California. Then I've also linked here just the links to the LSC lobbying rules that Lorin and Reann talked about in the last slide so you have those resources if you are an LSC-funded organization.

Then before we get to answering questions, we just wanted to give folks a snapshot of some of the 2025 priorities that our organizations have this year.

Also, this, again, further helps to explain how the advocacy looks like in real examples, which is hopefully helpful to you all and not just getting a bunch of dates and timelines and things thrown at you. It's maybe a little easier to get your head around if you're seeing real examples. So I'll let LAAC start with theirs.

Lorin Kline:

LAAC's perennial priority is always to protect and/or increase legal services funding. This is always at the top of our list of goals for our advocacy. What that looks like in 2025 is that we know that you and your organizations are going to be facing changing and growing needs as a result of the Trump administration taking office, so we really want to advocate for funding that will help you respond. We want you to be able to focus on meeting critical legal needs, starting with issues of the highest impact and services for the most vulnerable Californians. So we're really in an information gathering mode right now. We're serving the community about what needs you have.

This year is also a little bit different in that the governor called a special session of the legislature to appropriate funding specifically for the purpose of preparing for the Trump administration, and LAAC did advocacy for funding in the special session which was successful. As that process wraps up and we're gathering community input, we will have a clearer specific budget ask that we will be running this year. So stay tuned for that. As always, we would love your input about what your funding needs are.

Another potential priority that we are exploring for this year for next year is to update the IOLTA income eligibility threshold. As you may know, the income eligibility level for your Equal Access fund and IOLTA fund dollars was updated several years ago through our advocacy from 150% of the federal poverty level to 200%, and we've heard there's some interest in updating it again. So right now we are talking to organizations about how you feel about that. Please look out for invitations to attend a listening session or reach out to us anytime to let us know what you think because we're hearing from many of your organizations that you're interested in serving folks that are at even a little bit higher of an income level.

Reann Pacheco:

Thanks, Lorin. Then as always, LAAC is always interested in supporting your efforts, so let us know what you're working on. We're here to amplify your voice and to support you. Then as always as well, LAAC facilitates engagement of the legal aid community within our legislative advocacy. So we do things like have a monthly policy advocates call. We have a listserv that you could join. We also are doing retreats now, which we just held last October. It was really successful, and a lot of people enjoyed it. We're trying to do that more often. Every year, we host the Legal Aid Day/Week in Sacramento where we'll do a week of meetings with legislators either over Zoom or in person for one day in Sacramento.

Then we do these things called Days in the District in the Summer. We're going to try to be doing that more throughout the year, too. Because there are so

many new legislators this coming session, we want to make sure that they know about your work and they know who you are and they know that they could use you as a resource. So we're going to try to host more of these, not just in the summer. Then, as always, you could seek us out for any technical assistance.

Yasmin Peled:

Then I'll just give a quick overview of some of Justice in Aging's priorities for 2025. Again, we work on a broad range of issues, so this really is just a partial list. I didn't want to overwhelm folks with all of the policy priorities. But I do want to highlight that Medicaid defense is a big priority for us this year. There's a lot of uncertainty at the federal level in terms of ongoing funding and structure of the Medicaid program. So we'd love to hear from you all, people on the ground about the value of Medicaid, Medi-Cal here in California, and what the potential harm could be by cutting these essential services. Specifically for stories, we'd really love to hear about folks using LTSS benefits. Given that Medicare does not cover home care, Medi-Cal is the primary provider of those home and community-based services that people really rely on. So we are always seeking stories on that to use in our Medicaid defense work.

I'll flag that we continue to have a budget request. This is Medi-Cal share of cost reform, which is solely budget advocacy. We are continuing to advocate to fund that reform. So actually in the budget a few years ago in 2022, we got a commitment in the budget language to reform this program. The Medi-Cal share of cost program essentially requires that older adults and people with disabilities have to spend down all of their income on healthcare services. Then they can be left with \$600 a month to live on, and then Medi-Cal will then pick up the rest of their healthcare costs. But they have to impoverish themselves in order to get Medi-Cal to start paying for their healthcare. This is really inequitable, and we actually got agreement in the budget a few years ago to reform the program. The fine print in the budget, though, was that they didn't actually fund the reform in the 2022/2023 budget. So we've been unable in the last few years to get that funding appropriated to make the reform go into place. So once again this year, one of our top budget requests is to get that funding in place.

That is something to keep in mind as you're doing budget advocacy is that you can get your language in that final budget trailer bill in what passes, but they don't always necessarily put the money in there. So you want to make sure that you both get your program change and your money in order to be sure that your policy can go into effect.

Then lastly, older adult homelessness and older homelessness prevention remains a key priority for Justice in Aging. Folks are probably familiar that older adults are the fastest growing population of people experiencing homelessness in California. So we are always seeking stories from either people that have lived experience or if you have clients' stories to share, we collect those. We really appreciate folks coming to budget hearings and lifting up the experience of older adults experiencing homelessness, so that is getting out into the public in

these hearings. Then, of course, appreciate people's support on the variety of bills that impact older adults in the homeless services space.

We've got some time for questions now. I will read out some of the questions that have been put in the chat thus far. But please, if you have more questions, feel free, we have some time here. Starting off, there's a question here about drafting legislative language and formatting. So there's a question about, "Is there a format for how you're supposed to draft language, or will the Legislative Counsel and staff turn that language into the proper format?"

Lorin Kline: I can take a first stab at answering that question. The answer is essentially that Legislative Counsel does fix things and format things and do all kinds of magic to make things look the way they need to look. But at the same time, you'll want to try to have bill language looking like other bills look. We don't have a particular template that we use, but you can look at any bill, particularly ones that are on the same subject matter that you're working on to get an idea for what the bill should look like. It's also important to keep in mind that most bills are amending existing statutes or sometimes drafting new statutory language, so you can look at the statutes themselves to see what language should look like.

I will also add, we've heard some interests from legal aid organizations in learning more about legislative drafting. So we've been chatting with some other organizations like Western Center on Law & Poverty about potentially hosting a training in the future on legislative drafting. So if that's something that interests you, let us know.

Yasmin Peled: Sort of in a related ask, "What's meant by code search? How would I get the code? I'll take that. That's on me for not explaining things in time. Code is just another word for the existing legislative statute or the existing language that's there. It's just some jargon that I used there. Apologies for not explaining that. You can look up any... On that legislative info page, you have access to looking up all of the statutes in the state of California. Every bill that's passed, all the existing law, you have access to that. The law in California is broken up into code sections. So code is just, again, jargon that's used to identify sections of the existing law. We have a question here about LSC orgs. "Do LSC-funded organizations need an invite letter for budget asks, not their own for state budgets but for something else?"

Lorin Kline: Yes. The exception to LSC lobbying roles is LSC organizations can lobby on their own funding, so funding that will go to their organization to provide services. But if they want to advocate for other funding that's not specifically for their organization, they would need an invitation to comment.

Yasmin Peled: I have a couple questions on the portal. One question here is on the portal, "Is there a way to follow other groups? Also in attaching the PDF, how is accessibility ensured?" On the portal, there is not a way to follow other

organizations. The portal is just to submit the letters. In terms of accessibility, if the PDF that you are submitting, the accessibility check has already been done on it, I'm not sure if on the side of the legislative office how that comes through on their end of the system. But if you are submitting a PDF that's already accessible, it should be accessible on their end. But if it's not or if you have concerns, you can always additionally send the letter as an email to the staff. They will take it that way, but it needs to go through the online process so it can be formally in the system.

There is also a note here that sometimes the portal is not accessible to folks who use screen readers. Again, in that case, you can send the letter to the staffer and make clear that you're having an accessibility issue. They should be able to do what they need to do on the backend to make sure that your letter gets logged in. We have a question here. I know we didn't get into lobbying, but there is a question here, "Is there a difference in the lobbying definition between federal and state?"

Lorin Kline: I'm not personally an expert on federal lobbying rules other than the lobbying restrictions for LSC, so that's something I'd have to look further into.

Yasmin Peled: There's another lobbying question here. "Is lobbying a specific activity? Like, is writing a letter in support of proposed legislation lobbying, or is it more specific to efforts creating legislation or asking for a budget item for specific programs?"

Lorin Kline: Any of those things could be lobbying. Again, I would refer you to resources like those from the Alliance for Justice that give really detailed descriptions of what is lobbying. But anytime you're making an ask to a legislator, it can be lobbying. Whether it's by a letter or by drafting a bill, if you are asking legislators to do something, to vote for something, to pass something, that can be considered lobbying.

Yasmin Peled: We have a comment here also that the Alliance for Justice specifically has materials about the difference between state and federal lobbying, so for the first question. Someone here had a question on the Medi-Cal share of cost reform and if that recent change was related to the elimination of the asset test. They're not related. We are very pleased that the asset test is eliminated, but that change does not really have an impact on the Medi-Cal share of cash reform implementation. I'm happy to take questions about that reform offline as well. There is another question here on LSC. "Is there a centralized website or location where LSC invite letters from legislative members, government, or agency staff are updated, or is it just really distributed via listservs?"

Lorin Kline: The answer is yes. LAAC keeps those all in one place. Reann can share this link out frequently throughout the year. It's essentially just a shared folder where we put all of the Invitation to Comment letters that exist, at least ones that have been brought to our attention.

- Yasmin Peled: There is another lobbying question here. "Do rallies or events get counted towards lobbying, and how does that work if you're inviting legislators?"
- Lorin Kline: I don't think a rally necessarily, it depends on what activity at the rally you're referring to, would qualify as lobbying. Again, I would refer you to the Alliance for Justice resources to get a better answer than I'm able to give you here off the cuff.
- Yasmin Peled: The Alliance for Justice Resources will go into this, but there is something called grassroots lobbying, which is still a lobbying activity. So that's something to keep in mind if you're doing more advocacy at the community level. Again, if you have... There's some questions here on contacting us. Our contact information is here on this page. So if there's anything on Justice in Aging's priorities or our work that you want to circle back with me on, my email address is here, or if you want more information on Justice in Aging, you can email me and I can get you hooked into our resources. Then same for Lorin and Reann at LAAC, if you'd like to get involved in any of their priorities or get their information, their information is here on the screen.
- Lorin Kline: LAAC has a number of listservs where we are frequently communicating about this as well. Our policy advocates listserv is a great place to start if you're looking to get plugged in to LAAC's legislative work. I saw a question submitted about how you go about building relationships. I know that we've all mentioned that having relationships with legislative staff is important for advocacy, so I just wanted to give a couple of tips about building relationships with legislative staff.
- One tip I have would be to be persistent. These folks are taking a lot of meetings from a lot of people all the time, so one meeting's probably not going to do it. You need to repeatedly be going back, meeting with these people so they start to get to know you, get to know what you stand for, what your issues are, what work you're doing. That's important.
- My other tip would be to be helpful. If you're only ever showing up to ask for something, that isn't as good as if you're also offering your help. You all are on the ground doing really important work, and you have some great expertise that legislators and their staff can benefit from. So if you're offering to help them by gathering information for them or by gathering support for other legislation that they're running, I think that that's a great way to build a relationship with staff. If you've helped them in the past, they're going to be a lot more likely to take your call or take your email, schedule a meeting, and want to help you out, too.
- Yasmin Peled: I'll make just one final plug as we're wrapping up here, that you can always reach out to myself or Lorin and Reann. If you run into a roadblock somewhere or if you have a question or if you want to brainstorm some ideas with us, we're more than happy to chat with you and talk through the issue and provide our opinion on it. Between the three of us, we've got lots of relationships with folks in the legislature, and so I'm always happy to make connections for people.

Sometimes it can be overwhelming. You don't know where to start in terms of initial outreach. So I'm always happy to make connections for folks if you don't know where to start in terms of who to reach out to in the legislature because there are a lot of people.

All right, we'll take one last call for any questions here. Well, I want to thank everybody so much for their time on this Thursday morning. You will be getting the recording and the resources from this webinar, and you'll have all of our contact information. We look forward to working with you in this really important year. Thank you so much everybody.

Lorin Kline: Thanks, everyone.

Reann Pacheco: Thanks.