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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: Prepare for California's Upcoming Legislative Session. I'm Yasmin Peled, Director of California Government Affairs here at Justice in Aging, and today I'm joined by Lorin Kline and Reann Pacheco from the Legal Aid Association of California. Before we begin, I'd like to start with some webinar logistics. You are all on mute, but we welcome your participation in today's presentation through the Q&A function in the Zoom control panel. Also available in the Zoom control panel is the CC button, which enables closed captioning. I will be watching the participant questions as they come in throughout the webinar and will uplift high-level themes during the Q&A segment at the end of today's presentation. Any questions unanswered 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 our best to assist you. This webinar is being recorded and after the conclusion of the webinar, the slides and recording of today's presentation will be available on our website and will be emailed to all registrants. We would also appreciate your participation in the post-webinar survey that will pop up on your screen following the close of the webinar.

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. Since 1972, we focused our efforts primarily on fighting for people who have been marginalized and excluded from justice, such as women, people of color, LGBTQ individuals, and people with limited English proficiency.

Lorin Kline:

And the Legal Aid Association of California, or LAAC, is a statewide association of nonprofits that provide free civil legal services to Californians. These nonprofits provide critical legal assistance to low-income Californians and LAAC serves as the convener of those folks. We strengthen our members through advocacy, training, and support.

Yasmin Peled:

Justice in Aging produces a wealth of information like the webinar you're viewing today, along with fact sheets, issue briefs, alerts, and other materials to keep you up to date with important developments. If you're not already a member of our network, we would encourage you to join by going to our website and signing up. And I also encourage you all to sign up for LAAC's Network for their incredible resources. And so you can head to their website, laaonline.org, and click the get involved button on their website.

So before we get started today, we just have a few poll questions to get a sense of who's in the audience today. And so our first question is, how would you describe your experience with legislative and budget advocacy? So are you very experienced, medium experience, little experience?

All right, I think we can close the poll. So it seems like we've got maybe the most is in the medium experience, but also a lot of folks here with little experience and some folks who are quite experienced. And we really appreciate everybody joining today. And then we're going to do just one more poll question, which is we'd like to know if you work at a Legal Services Corporation, LSC-funded program.

All right, I think we can stop the poll. So we've got mostly folks that are not at LSC orgs, but we've got about 17, 20-ish percent of folks that are at LSC orgs. That's helpful for us as we later on we're going to talk about some specifics for the LSC funded programs. All right, thank you so much. We are going to get started, so I'm going to turn it over to my colleagues at LAAC to get us started on an overview of the legislative calendar.

Lorin Kline:

Great. So yeah, before we dive into the mechanics and strategy of legislative advocacy, we want to talk a little bit about the calendar because knowing the timeline and the deadlines of things is really important. So there's two different tracks that we're going to be talking about today. One is for budget advocacy and budget bills and the other is for policy bills. There's two different timelines with different deadlines, but both in both cases it's a very prescriptive budget laid out in the state constitution. The timeline is very clear.

Policy bills go through policy committees, so committees based on their subject matter such as a housing committee or a judiciary committee. And then if they have a cost associated, they will run through an appropriations committee.

Budget items, on the other hand, budget bills go through budget committees and subcommittees, specifically. Go ahead to the next slide.

We'll talk about budget first. The budget is done annually. So this timeline starts over every year. The new fiscal year begins on July 1st. And from that time, the administration starts working on a draft budget for the following year. The way the budget timeline works is kind of like a negotiation between the legislature and the governor's office. It kicks off in January. This actually just happened last week. The governor releases a proposed budget, so this is his first draft of what he thinks the budget should look like. He released that last week. He usually provides some summary documents and detail as well about everything that he thinks should be in the budget.

From there, the legislature takes the budget and begins holding hearings that we mentioned in the budget committee and budget subcommittees on this draft and what they think should be different about it. This is a key time for advocacy because you can advocate at these hearings and be advocating to legislators as they go through this process, in February to April. In May, by May 14th, the governor releases a revised budget. This is usually referred to as the May revise, if you've heard people say that before. So this is the governor's next offer, his next draft.

From there, there's some final legislative hearings. The legislature comes to their final draft of the budget. They have to vote on it by June 15th, and this is where things kick back to the governor to sign the final budget. There's a lot of negotiation that happens between the legislature and the governor in that final stretch. So by the end of June we have a new budget and then the new fiscal year begins again on July 1st.

Next I'll talk about policy bills. Policy bills are different in that legislative sessions in California are two years long as opposed to the budget, which starts over every year. So right now we are actually in the second year of a two-year session. It's important to note because in the first year of a session, there are some things that can carry over to the next year. In the second year, everything ends by the end of the year. Bills either make it or they don't make it and things will start over the next year in a new session.

So as far as the timeline goes for this year, which like I said, is the second year of a two-year session, January 16th is the deadline for two-year bills, so bills that started last year and were worked on last year to have their first policy committee hearing. There's a lot of deadlines in January because there are both bills coming from last year and new bills being introduced in January of this year. January 23rd is the deadline to send language to legislative counsel, which has to happen before a bill can go into print. And January 31st is the deadline for two-year bills to out of their first house. By February 20th, all new bills have to be introduced, and then March through April is when policy bills start moving through the legislature. They have their policy committee hearings and their first house. Go ahead to the next slide. And through the spring and summer we'll continue to move through policy committees.

You can see some more deadlines here. There are deadlines for when a bill has to pass out of its first house, deadlines for when bills have to go through appropriations if they have an associated cost. And we ultimately end with August 31st being the deadline for bills to pass out of the legislature and onto the governor. The governor then has about a month to either sign or veto all of the bills that the legislature has passed. So that's the basic calendar to timeline. And now we'll start to talk about strategy.

Reann Pacheco:

Okay, let's get into budget advocacy. So for budget advocacy, we always recommend starting early, scheduling meetings with legislative staff and start conversations about your work and of your eventual ask. I know it's easier said than done, but engage with the governor's office, inform them of your work early and at every stage of the process. At the end of the day, the governor's

office introduces the first budget proposal and has the power to veto. So, really important there.

Your budget ask will be introduced via the legislative process, but you need a legislator to champion your budget ask. That is where having those legislative meetings early will come in and you could see who is showing interest in your work. Be patient with yourself and look to mentors in the community for help because the process is hard to track. Legislative staff are obviously in the know, so ask them questions too.

Your ask will go through relevant budget committees and subcommittees, so focus in on those members because they will have the final say of whether your ask gets moved forward. If you have a policy bill that requires funding for a project or any fiscal impact, the bill will need a corresponding budget ask. And then I wanted to briefly mention, as we mentioned earlier, the governor submitted his proposed state budget to the legislature last week, and legal services gets funded through the equal access fund and the proposal showed that basically that the same funding as last year, which is 57 million.

Lorin Kline:

And I'll just add just anecdotally to what Reann explained about the budget process being opaque. I've been doing budget advocacy for about a decade and the process has changed a lot in that time. A decade ago things were a lot more transparent, there were a lot more committee hearings, negotiations, the two houses of the legislature happened very much in public and that is not the case anymore. A lot more negotiation happens behind closed doors, decisions are reached much earlier. So like Reann said, it's extra important to start early and to make sure that you have mentors that are familiar with the process and connected with folks behind the scene.

Yasmin Peled:

Thanks, Reann and Lorin. So now we're going to talk a little bit about legislative advocacy, in particular. And so there are two broad categories for engagement, and that's either sponsoring a bill or taking a position. And so, sponsoring legislation really is a higher level of engagement and this means that you are really the key contact on a bill and heavily involved in the process. Usually, sponsors are involved in the drafting of the initial bill language. You're also responsible to find the legislative author and then really lead on the advocacy, especially outside of the capitol. And so digging in a little bit more into what some of these specific responsibilities are, this is like working with legislative council on the language, building the coalition of support around your bill, submitting letters through the advocacy portal, being the primary lobby lead. You're likely testifying in committee and then you're meeting with stakeholders. So, for instance, if somebody has questions about your bill or is opposed to your bill, you would be the front line to take those meetings and answer those questions. The other level of engagement around legislative advocacy is just to take positions on bills. So this could be supporting, opposing, being in support of amended. And so this is usually less work and is mostly focused on submitting your letter and maybe doing a "me too" in committee and maybe potentially some other meetings.

And when we talk about doing a me-too in committee, that happens specifically in the policy committee hearings. And so when a bill is up in committee, there are two people who provide a full testimony in support of their bill, and then also the same opportunities given to the opposition if there's opposition. However, there are usually more than two organizations who support a bill. So after the full testimony is given, there's an opportunity for the public to come up to the mic and simply state their name, organization and position. So for example, if I were giving a me-too on a bill, I would go up when prompted and say, "Yasmin Peled with Justice in Aging and we are in support of this measure." So with that overview, you might be wondering, I have a bill idea, so how do I get started? And similar to budget advocacy, the first is to get started early. As Lorin described, the legislative calendar moves quickly and there are very concrete deadlines that need to be met for a bill to proceed. So if you start too late, you might not be able to get everything done in time to actually move your bill. So once you've identified a policy idea or a policy solution that you'd like to work on, you'll then need to draft up some language. And then in addition to drafting up legislative language, you'll also need a fact sheet that more simply describes the bill idea, what the problem is, what your solution is, and again, really in plain language because you're going to be using this fact sheet to pitch your idea. But before you go pitch your idea, you might want to check in with other partners, other organizations that you work with to see if there's maybe interest in working together on an issue because sometimes it's helpful to have a co-sponsor to share the load of work. So then the next step is to go and start pitching this idea to legislative offices. If you already have a relationship with a legislative office, that can be a really good place to start. You may also want to consider working with a legislator who's on a relevant committee. So if you're working on a healthcare idea, you could approach members who are on the health committee. If you've identified a member on the health committee but you don't know who the correct staffer is, you can just call up their legislative office and ask, "Hi, I'm wondering who works on healthcare, who works on judiciary." And the person who answers the phone will give you the person's name, give you their email, and then you can follow up with that staffer and have a meeting. Another way to potentially figure out where to get started is if you have a relationship with the relevant committee staff. So let's say, again, you're working on a healthcare issue and you know the health committee consultant because you've worked with them previously on something, you can always go to the health committee consultant and say, "Hey, we have this idea. Do you think this is a good idea? Do you know of any members who are looking for bill ideas?" Because often legislative offices will go to the committee staff and ask them, "Hey, do you know if anyone is working on XYZ issue? Do you have any ideas for me?" And so the committee staff are really valuable partners in this work. And so once you've had a meeting with a legislative staffer, they will then go back to their boss, talk to the legislator. And if that legislator is interested in your issue and wants to work with you, the staff member will let you know, and then you will be officially running a bill through the legislative process.

We wanted to give also a quick overview of some of the tools that often get used in advocacy. And so the first is the advocate portal. And so this is a screenshot of the advocate portal. This is the first step for submitting letters, and this is specifically for letters related to bills. Budget letters do not get submitted through the portal, and so this is what the front page of the portal looks like. If you don't already have an account, you will need to make one. And then when you go into the portal, once you've signed in, this is what a screenshot of the inside of the portal looks like.

And so there's a list of all of the bills that you've previously submitted and then you can see up here in blue, submit a letter. You click that and the website will then prompt you to attach a file and complete the process of submitting a letter through the portal. And you have to submit a letter through the portal. You can't just email your letter in anymore. That used to be how you would submit letters. In very rare circumstances, if something is not working properly or for accessibility needs or whatnot, a committee might make an exception. But for the most part, you really need to submit everything policy bill related through the advocate portal. Another useful tool is the Legislative Information website, and this is what the home page looks like and this is where you can look up a bill, as well as search the code, which can be really helpful in researching a topic. So we wanted to provide a few concrete examples of both budget and legislative advocacy so you can get a sense of how these two paths are similar but also work together, in some cases. I will turn it over to LAAC to start describing the legal services funding request.

Lorin Kline:

Right. So legal services funding is a pure budget request. There's no policy attached to it. It's not making any change to the law. It's just funding. So pure budget ask purely runs on the budget timeline, no need to worry about a policy bill. There's a question in the chat about what it means to start early for budget advocacy because I said the governor's office starts working on the next year's budget, July 1st. If you want to be advocating with the administration to get something in the first draft of the budget, which is difficult to do, it's never too early to start. In the summertime, you can start talking to the administration, which would mean contacting the Department of Finance and trying to get a meeting with someone there. You can also advocate with state agencies directly.

So, legal services funding is in the judicial branch budget. So you could be talking to the judicial council about the components of their budget because the administration will make their first draft of the budget by talking to all of the state agencies and saying, "What do you need in the budget next year?" So that's what starting early looks like, if you're advocating with the administration. If you want your budget asked to get in through the legislature, you don't want to start asking in the summer. Legislative offices are busy with their policy bills. They haven't even thought about the budget for the next year yet. You're better to start in mid to late fall, so late October, November after policy bills are done for the year and legislative offices are starting to think about what will be on their priority list for the following year.

Yasmin Peled:

So an example of where there's a budget ask and a policy bill together is something like older adult rental assistance. And so this is a policy that Justice in Aging and a number of our partners have been working on for a number of years, and it was to create a rental assistance program specifically for older adults and people with disabilities. And so, because this was both going to require new funding as well as creating a new program and a new policy, we needed to do a bill. And the most recent bill was SB 37, and we also had to have a corresponding budget request. So we had to be doing advocacy on these simultaneously.

So we were going to the policy committee hearings to advocate for SB 37 and submitting letters and working with the coalition of supporters to get everything in on the policy committee side. But then we also had to be advocating on the budget committee, the subcommittee side, specifically. And every budget subcommittee now has a different process for how they deal with stakeholder requests. You pretty much need to have a legislative champion in order for the subcommittees to even consider your request. That didn't use to be the case, but now you need to have a legislator that is championing it.

That's where the similarities stop. Every subcommittee, within even the Senate, has a different process for how to move your proposal forward. So some subcommittees might have a document that you need to fill out information about your proposal and that needs to come officially from the legislator who's championing the proposal. Maybe they just need to have a letter or some subcommittees might just need a letter coming from the office to the committee saying, "Hey, I'm championing this issue."

It really depends and honestly varies year to year, depending on how squeezed the budget process is. So it's important to reach out to the staff of the specific subcommittee to find out what the rules are that year. And all of the names and emails of the staff are always on the committee website, so it is pretty easy to at least figure out the staff to talk to. And in my experience, the staff is really easy to communicate with and quite responsive. So I wouldn't be intimidated by that. The next example is something that's just a policy bill. So last year, Justice in Aging was part of a group of organizations that co-sponsored a bill to allow for the alternative service of elder abuse restraining orders. And this bill idea didn't have a cost associated with it. So it wasn't going to cost the state any additional money to implement this change. And so it was able to move forward just as a policy bill. So we didn't need to have a corresponding budget request to move. And so this just moved through, as Lorin described earlier, the typical legislative process of moving through first the judiciary committee and then to the appropriations committee, then to the floor, and then it moved to the next house and it sort of went through again the same process. And I'm happy to say that that bill actually did pass and it's going into effect next year in 2027.

So that's, hopefully, a helpful explanation of how some of this, the overarching rules actually play out in real-life examples. We are now going to move on to some specific considerations for LSC org. So I'm going to turn it over to Reann.

Reann Pacheco:

So I think based on the poll, there's about 33 of you out there. So I think it'll still be beneficial to quickly go through some LSC restrictions and things that are

allowed. If you are an LSC org, you are not allowed to lobby. If you want to discuss any legislation, you're going to need something called an invitation to comment letter. LAAC collects these letters and notifies LSC EDs when we receive these letters. And we also try to get these letters for you when we realize it's something that you may want to comment on. We also try to educate the legislature about these letters so that it becomes a step in their system, so when they do run a bill, they're already creating a letter for y'all. All that being said, LSC organizations are not totally restricted. If you aren't making an ask, then it's not lobbying. So you could and you should do legislator education. Tell them about your work, share what you're experiencing on the ground with their constituents, share your contact with them. All these things are allowed. Also, if you're an LSC org, you can lobby on your own funding. So you do not need a letter to talk about your own funding. The federal government did not want any restrictions on you asking for funding from the state. And then if all else fails, I would just say err on the side of caution and just talk to your ED. If you don't know what you can and cannot do, just ask your ED.

Yasmin Peled: And I'll also make a note to folks that are maybe working on a bill. If you're not an LSC org, but you want LSC orgs to be able to comment and send in letters on your bill, the sooner you ask your legislative champion to write that LSC letter of invite, the better because it gives those groups... Those groups can't start working on those letters until they have that letter of invite. And so it's important that if you want these groups to be engaged to get that letter.

Lorin Kline: And we have a template for that letter. So if you're asking a legislative office for it and they don't seem familiar with the process, you can just give them a template to fill out.

Yasmin Peled: So we're not going to spend a lot of time on this webinar talking about lobbying rules, but I did want to make sure that folks have these resources. And so again, all of the slides and links are going to be going out to you after the webinar concludes. So I highly encourage folks to read the materials from Alliance for Justice's Bolder Advocacy project. They do a lot of trainings as well, and they have recorded webinars. You can invite them to come and do a webinar to your group. They're very knowledgeable about, specifically, what nonprofits need to know in California and the rules around nonprofit lobbying, which is allowed. And we also have the LSC lobbying rules here linked for those that need it. So we're going to talk a little bit about our organization's 2026 priorities to again give you a sense of how some of the advocacy strategies play out into what we're working on for this coming year. And then I see some Q&A piling up in the chat. And so we will get to Q&A very shortly, because there are some good questions in there. So I'm going to turn it over to LAAC.

Lorin Kline: So as far as LAAC's priorities for 2026 go, we have some perennial priorities that guide our advocacy every year. And probably our top priority every year is to protect and/or increase funding for legal services. So the state is facing a deficit budget, a pretty dramatic deficit, so it's not a great time to be seeking new

funding. Our top priority will be to protect funding from any cuts, but we will still continue to advocate for new funding in the hopes that that will be possible. We are proceeding strategically in light of this difficult budget situation, trying to carefully select some budget champions.

Some priorities that we are looking at as of now, depending on what we can get champions to support, is some funding that would focus on healthcare access. In light of federal policy changes, we anticipate a lot of increased need in terms of being able to access healthcare and other benefits. We also are looking at bringing back homelessness prevention funding. This was a grant program that existed over several cycles, but in the last couple of years was completed and not renewed in light of the bad budget, but we're hoping that's something that we can bring back.

Another perennial priority for us is to do anything that will protect or improve access to courts or access to legal services. So a couple of things we'll be working on this year are looking at the issue of court access in light of ICE presence in courthouses. And this may be something that we address legislatively or maybe something that we try to address in other ways. We've been having some initial calls with this with folks at lots of organizations. If you're interested in getting involved, just email us. We also, for many years, have worked on the ongoing issue of access to a verbatim court record when a court reporter is not available or the litigant cannot afford a court reporter. This advocacy has proceeded in many avenues, including legislative, and is something that we'll continue to work on this year.

Reann Pacheco:

And then our priority will always be to support your legislative efforts. So share with us what you're working on, come to our policy calls, share with other advocates. We are here to amplify your voice and support you. This includes our ability to coordinate the legal aid community's shared voice and facilitate involvement in our legislative advocacy. So there are many ways for you to get involved in our advocacy work. Like I said earlier, you could join LAACS policy advocates listserv, attend monthly meetings, and then come to our policy retreats.

A couple times a year, LAAC hosts specific events where we will help you meet with your legislator like Dayan Zach, but also I can help you do that anytime of the year. And we have a new project called the Legal Aid Policy Codex that will be a community-sourced document for all of your policy needs. So you could start contributing to that. And then advocacy work overlaps significantly with communications. So join our community-wide communications efforts. Also, you should always seek out LAAC for any technical assistance. And if you have any questions about any of these things, you can reach out to me and Lorin for more information.

Yasmin Peled:

Thanks, Reann. So for Justice in Aging, a big focus for us this year is going to be HR 1 implementation. HR 1 passed last July. It's often called the Big Beautiful Bill. This very harmful federal law is going to make big changes to the Medicaid program here in California and also a lot of other programs that older adults rely on. And so our focus is going to be ensuring that we mitigate harm as much as

possible. And so there's a lot of administrative advocacy and so that wasn't really a focus of the webinar today, but in addition to the administrative advocacy, there's likely to be bills and budget-related items when it comes to HR 1 that we will be focused on.

And then in part due to HR 1, it's really clear that we don't have enough revenues to support our social safety net programs and that the need for these programs is only growing and we can't continue to be in a situation where we're potentially having to cut these programs and then ultimately making the situation for people even worse. And so we're going to be very engaged this year in a wide range of efforts to try and get more sustainable revenue for these critical safety net programs.

And then again, a perennial priority for us around older adult homelessness prevention, older adults are the fastest growing group of people experiencing homelessness in the state. And so it's important that we continue to build up the education in the legislature and keep building champions to work on this issue. This is an expensive proposition, and so like Lorin said, this being a tough budget year, it makes having a budget ask more difficult, but we're hoping that by continuing to build champions in the legislature and the education around these issues, that we can get some investment, maybe not this year, but building the groundwork to get investment in the future.

So we now have plenty of time for questions. Our contact information is here, and I'm going to start going through the Q&A. And so if you haven't already submitted a question, you have one, please use the Q&A function in Zoom. I'm going to start with a follow-up on the comment letters of invite. I thought we were not allowed to ask for the invitation to comment letters.

Lorin Kline: Right. So I can answer that question. If you work at an LSC-funded organization and you want to comment on something, you should not be asking the legislative office for an invitation. When Yasmin was talking about getting these letters, she was talking about if you work at a non-LSC-funded organization and you're sponsoring a bill and you want LSC advocates to be able to comment on it, you should be asking for an invitation to comment letter. If you work at an LSC organization and you're interested in commenting on a bill and you don't know if there's already an invitation to comment, reach out to me or to Reann. We have a file or we keep all of these letters and we can take a look for you.

Yasmin Peled: Thank you so much, Lorin. Another question about the appropriations and budget process, I see bills that we've tried and we think they have little to no cost and then they get to appropriations, and then they assign a cost and they die. Any response to that quandary? Which many of us have experienced.

Lorin Kline: Yeah, I was just going to say that that is something that we have experienced as well. And it's important to note that a cost getting assigned, that's something that is a negotiation in and of itself, particularly if there will be a cost to a state agency. For example, LAAC ran a bill where there was going to be some cost through the Department of Justice, the attorney general's office. And we engaged in a lengthy negotiation with the attorney general's office itself about

how much they thought it would cost and how much we thought it would cost, and that influenced the ultimate price tag that was put on it in the appropriations committee. So I would say make sure that you're engaging in that conversation and negotiation rather than just waiting for the appropriations committee to assign a cost. But that is a difficult situation to navigate.

Yasmin Peled:

I've got a question here about what's the best way to one track the two-year bills and, two, interpret the daily schedule of the floor schedule committee hearings, et cetera. There's a couple different ways. The first, there are services that you can, if your organization has the funds, and there are services that you can purchase that track bills. A very popular one is called Capital Track, but recognize that these can be cost prohibitive.

There is a way to track bills through the legislative info website, actually. So if you type in a bill that you're interested in and you go and click into the bill, there's actually a way to click to get updates and you can type in your email. And you will get an email update every time something changes with the bill. And so that can be one way to track them and specifically the two-year bills, which was your question. It can be especially helpful to have those bills tracked and get emails on because you can often forget about them because the process will start in one year, stop, and then suddenly it starts up again potentially in January very fast and quick. And so getting those emails is helpful. The other part of your question about how do you track committees and hearings, some of these paid services will notify you when something is scheduled for a hearing. So that's one way. But again, if you aren't using one of these paid services, you kind of have to do a lot of manual work, unfortunately. So the first is to go to the committee website. The committee's websites will usually have at least the following week's hearing schedule out and it'll list all of the bills that are set to be heard in that committee hearing as well as the date and time and location.

The other thing you can do is, at least for the Assembly budget, you can go on their website and click which subcommittee you want to get updates on about hearings, and you will get an automated email when that committee puts up a new agenda or picks a new hearing date. And so you will get some automated emails from that. And then, lastly, there's something called the daily file, which is every day's agenda for both houses of the legislature. So there's both a Senate daily file and an Assembly daily file, and they're on the front page of both of the websites for both the Assembly and Senate.

And those are big PDF documents that you can go through and any hearing that is scheduled is going to be in that document. I will say that these documents can change day to day because the daily file that, for instance, today came out on Monday, maybe might not have a whole lot of information in it, might not have all the hearings. But maybe tomorrow, another committee figures out part of their schedule, the daily file gets updated, and now there's a new set of committee hearings that are in the Tuesday daily file that weren't in the Monday one. So that's something that you could get in the habit of checking

every day potentially, especially in the busy times. That was a long answer to your question.

Lorin Kline:

No. I would second your recommendation to check the committee's websites because that is often the first place that I find information. I find it easier to look at than the daily file, though I would just flag that some committees are better than others about posting their agendas in a timely manner. But you can often rely on the fact that most committees meet at a regular cadence. So the Senate Judiciary Committee might meet every Tuesday at 10. So at least when the meetings are going to happen, and when in doubt, you can always ask. You can always call committee staff and ask them when agenda is going to be posted or if they know if something's going to be on an agenda. That's always a backup that you can do as well.

Yasmin Peled:

There's another question about the legislative position portal. You have to send in... There's actually a number of questions about the legislative position portal. This can be both used for organizational letters, but also you as an individual. If you're not a part of an organization and you want to send in a letter, you have to use the position portal. And if you are not a part of an organization, you just say you're an individual, the portal will allow you to submit a letter that way. But you need to make an account and go through that process. Again, you can't just send in an email.

There's a question here about, is the position portal better than doing postcards or letters through the USPS? I'd say, again, it's different reasons. If you want to send in a position on a bill and you want your position to be noted in the record and listed on the analysis as Justice in Aging is in support of AB 1, you need to send in a letter through the portal for the committee staff to then list your organization as supporting the bill. And so you have to do it through the portal. Now if we're talking about advocacy strategies around showing a grassroots movement and support for an issue, a post-carding campaign, letter campaign to the specific legislator's office, making phone calls, all of that, I'd put in a different bucket of advocacy. But those are all useful tools, potentially. But when it comes specifically to taking a position on a bill, it has to be through the advocacy portal.

Lorin Kline:

I saw a couple of questions about revenue and advocating for new revenue, and I know that's something that Yasmin mentioned as the priority for justice and aging this year. I just wanted to address that briefly. When we talk about the funding requests that LAAC is making, that's making requests for funding from the state's general fund like we have always done and where legal aid funding has always come from. But this conversation about new revenue is happening a lot right now because the state budget is in such a deficit.

So LAAC will be having a working group that will meet several times this year to talk about potential new sources of revenue for legal aid funding, specifically. So if you would like to participate in that, email me, email Reann, because we do see a need for more revenue. But it's also something, like I said, that is very popular right now. You've probably seen some talk of a new billionaires tax that

would raise more state revenue, which the governor recently came out and said he would not support.

It's a very active conversation. So Yasmin may be able to share more about what Justice in Aging is thinking. But for legal aid funding specifically, that is advocacy that we would like to do in the future. But we are in a stage right now of having a working group where we brainstorm ideas, think about new sources of revenue.

Yasmin Peled:

And I think to the other questions about revenue, there are a lot of moving conversations happening right now in Sacramento. And so there's a lot of ideas floating around. Folks might remember last year the California Budget and Policy Center released a number of papers, analysis about these corporate tax loophole proposals that would raise a significant amount of revenue. And that by closing those loopholes, all that money generated would go to the state general fund. But we know that because of the size of many of these social safety net programs like CalFresh, Medi-Cal, that those programs would get a real benefit from having an injection of funds into the state general fund. So I think there's still interest in those proposals. It's a real negotiation between the legislature, the governor advocates, what ends up kind of moving forward this year and it's going to be an active area. And so I encourage folks, you can feel free to reach out to me if you're getting interested in getting involved in the future, want to hear more. I'm happy to talk to folks offline about some of the specifics and as things come together and move forward. There was an interesting question about working in the district initially. And so, is potentially working with the district staff initially and then moving up from there, is that recommended?

Lorin Kline:

I can go ahead and take a stab at that and then I'd love to hear, Yasmin, what you think as well. I think that that's definitely a viable strategy. At the end of the day, legislators are representatives of their districts and they look to what is happening in their district to get ideas for legislation. So if you are developing a relationship with a district staffer and identifying some problem that's actively happening in your district, that can be a good way to convince a legislator to take on an issue. In order to get anything really moving in Sacramento, you're ultimately going to need to connect with the capitol staff, but that is an introduction that a district representative could easily make for you.

Yasmin Peled:

Yes, I totally agree with Lorin. I think starting at the district level is sometimes an underutilized pathway, especially if you have a relationship there. Where you have the relationship is sometimes the best place to start. And so if that's at the district, that's great. Even if you don't have a relationship at the district level, sometimes, especially in the fall, when things are quieter and the legislators are actually back home in their districts in the fall, starting there could be a good opportunity and you might actually get an opportunity to potentially meet with the legislator, depending on how things go. I think especially developing relationships at the district level can really translate to your work in the capital.

And so the district staff are also sometimes more willing to meet with you than the capitol staff, especially in busier times.

Lorin Kline: And if you're interested in meeting with district offices but don't know where to start, we can support you on that. Reann has a whole toolkit that she can provide to you about meeting with staff and legislators in the district. So, definitely reach out to us.

Yasmin Peled: So there's a question here about budget asks and bills. So a budget ask just needs a legislative champion and does not need a bill if it's solely a budget ask. I would say yes. However, sometimes people will do bills as well because it's sometimes easier to rally around a bill and organize around a bill, even though the real, what really needs to happen is the budget ask. So sometimes what you'll see is that people will have both a bill and a budget ask, and if the budget ask, if you get your budget investment in June at the end of the budget cycle, then the bill kind of goes away. They won't move forward with the bill anymore. So that is also a strategy. I don't know if Lorin and Reann had more to add to that.

Lorin Kline: No, I totally agree. And if it was confusing at all that we talked about budget bills, the budget bill is essentially one giant bill that has the whole state budget. So there's not a bunch of little budget bills for every budget ask, if that makes sense. And it does get complicated. There is more than one budget bill. Sometimes the budget comes out in a few pieces. There's budget trailer bills, which is probably a topic for a deeper conversation. But if it was at all confusing to hear us talk about budget bills, that's because the budget itself comes through in one big giant bill.

Yasmin Peled: And then there's another interesting question here about how we were able to find a champion for the policy bill, but then those staffers say we don't want to do both policy and budget request at the same time, even though it really does require having both. So any strategies for addressing that with staff?

Lorin Kline: That's a tough question. I've not come across that before, but I think that just having a conversation with the legislative staff about why they have that resistance would be helpful. You don't want to end up in the situation where you pass a policy bill and then it gets vetoed because it has no funding attached. So I'd say expressing those concerns to the legislative staff, trying to understand why they don't want to have a budget ask as well would be important.

Yasmin Peled: The other thing I'd add to that is that if they are really, let's say, you're working with Assembly Member Jones, I'm just picking a random name. Assembly Member Jones. Assembly Member Jones is willing to do your bill but doesn't want to do the budget request, you could ask, you could say, "Okay. Well, we're happy to work with you on the bill, but would it be okay with you if we went to Assembly Member Smith to be the champion on the budget request?"

The person who's doing the bill doesn't necessarily have to be the person that's doing the budget request. It's easier for you as the sponsor if they're the same person because it simplifies your own work. But if you need to have a different assembly member doing the budget request, again with the blessing of the other assembly member, that is also potentially a possibility. But again, you've got to get the blessing to do that because sometimes legislators can get kind of turf about their issues.

Lorin Kline: Yeah, I think that's great advice, and I think this is probably a good moment to highlight that different offices operate very differently and different staffers operate very differently. When you're sponsoring legislation, you will come across offices and staffers that already have a complete strategy in mind for the bill. They want to take the lead on it. And in other cases, they really want you to do the legwork and you to design the strategy. So just something to be aware of when you're thinking about sponsoring a bill and talking to different offices is that, your level of involvement in the strategy may look very different depending on the bill and the year and the office.

Yasmin Peled: There's a question here specifically about strategies for people who are in Southern California to use to develop relationships in Sacramento. And I think I would go back to our comments about the district staff. I think that that's really a great way, especially for folks who aren't close to Sacramento, to start to develop relationships with the legislative offices. So to use that as a way to start. And there are many groups. I've worked with a lot of folks that are based in Southern California, but they still sponsor legislation. I think it's become a lot easier post COVID with Zoom, and a lot of meetings now are happening on Zoom. You used to have to do all of your meetings with the legislative staff. If you wanted to talk to the staff for who you're working with or whatnot, you'd have to go into the capitol and go meet with them. That's not the case anymore. Zoom makes it a lot easier. Yet, you have to be in person for hearings. There are no more virtual or remote hearing options, so that makes it harder to engage in person, but it is possible to be in Southern California and still be able to do the Sacramento advocacy.

Lorin Kline: Yeah, I think COVID really changed the game on that. You wouldn't be able to do a bunch of meetings by Zoom before, like Yasmin said. And in terms of developing relationships, I would say that anything you can do to help a legislative staffer to create some kind of back and forth is good, rather than just having a meeting where they sit and listen and you talk. Anything that you can do going forward, you can get them information that they might find useful that came up in your meeting, you can get the word out about another bill that they're doing. Anything that you can do to help them and foster the relationship, whether you're in person or not, I think is really helpful for maintaining ongoing relationships.

Yasmin Peled: And then I think our last question here is going to be, how do experienced folks dissect these budget drafts? There are so many numbers and acronyms. The

budget and policy center glossary book is helpful, but was wondering if there's any other advice in dissecting all of this budget wonkiness. I can start, but Lorin and Reann, feel free to add on. I think one thing that's helpful is that both the Senate and Assembly budget committees put out summaries of the governor's budget, and that is usually at a higher level. And so that can be a helpful summary that maybe explains it in a different way that wasn't as clear as the governor's summary documents.

I think having a relationship or building a relationship with the budget committee staff and being able to talk to them and get their read on it, and so that way you don't have to figure everything else out yourself, it's someone you can ask questions to is useful. And then being in coalition, in coordination with partners, I think we're all... No one figures it out by themselves. Everyone is relying on partners and others to help understand what's going on. Everyone's an expert in their small area, but not necessarily everything. And so being able to share that with others, it's a team effort, I think budget, definitely.

Lorin Kline:

I totally agree. It's definitely a team effort and I will validate your feelings that it's confusing because it is total gibberish. This is a great reason to be on LAAC's policy advocates listserv. That's the exact kind of question you can ask folks like, "Hey, I don't understand how to read this. Who can help me?" The Budget and Policy Center that you already highlighted has great resources and they'll often provide technical assistance. I have cold called them on several occasions just to ask a question. I don't understand what this document means, and there's often someone there that can help you.

Yasmin Peled:

So we are coming to the end of our time today. Thank you again to all of you for joining us. Thank you to Lorin and Reann for co-presenting. As a reminder, any questions that went unanswered today will be followed up on via email. And please don't forget to complete the post-webinar survey. Your feedback on these webinars is really important to us. Thank you so much and have a great rest of your day, everyone.