



THE REALTOR® PARTY OF CALIFORNIA

Best Practices Guide

10 Key Steps to a Successful Local Legislative/District Day

The California Association of REALTORS' (C.A.R.) Local Legislative and District Days

provide an opportunity for you to establish, renew, and retain relationships with the legislators and local elected officials who make decisions that affect housing policies in your community. You will meet with policymakers and housing policy staff, hear from C.A.R.'s Government Affairs team, and network with other REALTOR® Party members. C.A.R. has created 10 key steps and best practices to help guide your association in holding your own Local Legislative/District Day.

Step 1

Find/Contact Your Field Representative

Find your C.A.R. Field Representative under 'Government Affairs' here: <https://www.car.org/meetings/outreaches/#requests>

Step 2

Determine the Best Format for Your Local Legislative/District Day

Identify the setting format that best fits your objectives, such as one-on-one in-office meetings or a larger networking event.

Step 3

Find Your Elected Officials

Find Your Local Elected Officials: Visit your local County or City Clerk website

Find Your State Representatives: Visit <https://findyourrep.legislature.ca.gov/> to find your Assemblymember and State Senator. To find your representative's contact information, go to <https://www.senate.ca.gov/> or <https://www.assembly.ca.gov/> and click on their specific page.

Step 4

Decide the Priority Issues

Decide which issues and legislation your association will prioritize. This will help set clear goals for your members and help them to be specific about your policy priorities. If you are meeting with state legislators, you will also need to have the most current information from your field rep about C.A.R.'s state legislative bill priorities.

Step 5

Schedule Your Meetings

Below is a sample invitation you can edit and use to invite your elected representatives to a small group meeting. The email should be addressed to the elected representative and sent to important office contacts, including the scheduler, district director, and field representative.

Dear _____,

On behalf of the real estate professionals in your district, I am respectfully requesting a meeting with [LAWMAKER] to discuss the [name of local association] policy priorities.

[Name of local association] is on a mission to make homeownership attainable for EVERY Californian in our community. We are committed to helping make bold changes to ensure fair and equitable housing for all.

We are requesting a 30 to 45-minute meeting with REALTORS® who live in your district during the weeks of [July x, x, or August x]. We understand that [LAWMAKER] has a busy schedule and we appreciate the opportunity to discuss these critical issues with you.

Please feel free to contact me at either [insert both day-time phone number and email address] to confirm our appointment. We are happy to provide you with any additional information you may need.

Thank you for your time and consideration.

*Sincerely,
[YOUR NAME]
[ASSOCIATION]*

Step 6

Invite Your Association Members

One of the most important steps is getting the word out to your fellow association members about your Local Legislative/District Day. Make sure that your members know that this day is a great opportunity to network with elected officials and other REALTORS®, and to advocate for important housing issues that impact your local community.

Step 7

Continue to Promote Your Local Legislative/District Day

You'll need to promote the Legislative Day for your members through multiple forms of communication. Here are some ways you can advertise your Local Legislative/District Day:

- Promote it in your association's newsletter
 - Send out email reminders
 - Promote it at upcoming meetings
 - Create and post the event on social media
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Step 8

Create Materials

Prep your materials. It is important to have a concise document highlighting the policy issues you will discuss with lawmakers. These materials can be left behind so the lawmaker and their staff can refer to it afterward. Decide if you will need fact sheets, or any other information to provide your lawmaker with more knowledge on the issues you will be discussing. Work with your field rep on what materials are best.

Step 9

Prepare for the Meeting

What to Expect

- ✓ Tell your story. Your own story is powerful. Be prepared to speak about yourself, the challenges you currently face in the profession, and why you are motivated to help your clients. If needed, keep notes close to you with the top bullet points you would like to raise if the opportunity presents itself.
- ✓ Ask your legislator about their priorities. In order to identify common ground, ask how C.A.R. can potentially partner with your legislator and help with their priorities.
- ✓ It is okay to say "I don't know, but we'll follow up" if you do not know the answer to a specific question. You are not expected to be an expert at recalling all facts and figures, which is why it is okay to track down specific answers after the meeting and utilize C.A.R.'s lobbyist team for follow-up, if needed.
- ✓ Set up regular communication. Ask for a follow-up meeting in order to further build a relationship with your legislator by continuing to update them on the issues you are facing in their district.

Things to Avoid

- ✓ Stay on topic. Do not bring up personal political beliefs.
 - ✓ Legislative visits are restricted to policy discussions, education, and relationship building. Per California law, it is inappropriate to discuss fundraising events or political activity in this setting.
 - ✓ If a disagreement arises, it is best not to engage in a back-and-forth exchange with your legislator or their staff. These meetings should be cordial and friendly; however, if you happen to disagree with something said, you can politely note your difference of opinion and move on.
 - ✓ Do not overstate any facts or guess if you don't know the answer to a question. If you are unsure of an answer, let your legislator know you will get back to them. Trust is key to building a relationship.
 - ✓ Do not interrupt. Give everyone an equal chance to speak.
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Step 10

Follow Up

Building relationships with your lawmakers is one of the most beneficial outcomes for Local Legislative/District Day. By following up to thank your lawmaker in an email or a call after you meet with them, you will continue to build on the connection you formed during your Local Legislative/District Day.