

CalCPA's Guide for Building a Relationship with Your Elected Officials

A large part of CalCPA's government relations efforts is based on building and maintaining relationships with elected leaders. Our political system is founded on the principles of citizens voicing their views and concerns with policymakers. Elected officials at all levels of government depend on advice from constituents to successfully craft and pass legislation to address problems and help facilitate the growth of the state and local communities. With the various issues facing our profession, it's more important than ever to educate policymakers on the real-life impact of legislative proposals.

In essence, relationship building is the process of becoming acquainted with government officials to assist them as they formulate and execute public policy objectives. The process follows four basic steps: **identify**, **inform**, **advocate** and **assist**.

Identify: Politicians are inherently bright and well-connected public people, but they do not know every one of their constituents or everything about their district. By identifying yourself as a CPA in the district you make yourself, your firm and your profession known to your elected representatives. The objective is to identify yourself and build contacts ahead of time, before you need them. This makes it more likely that you will receive a receptive ear once there is an issue that you want to discuss.

Inform: No legislator wants to intentionally harm businesses or constituents in their district. Policymakers are always looking for feedback from their constituents. Informing them about the possible effects their policy actions may have on your ability to represent clients and operate as a CPA can go a long way toward preventing onerous laws and regulations from becoming a reality.

Advocate: In an honest and thoughtful discussion you can help advocate for your profession by presenting rational and well-supported arguments for a particular policy. Let your representative know why he or she should support or oppose a particular issue. You are your own best advocate. This is your chance to provide your perspective on public policy to your representative.

Assist: This is the most important step, but is often overlooked in the political world. Thank your representative for listening and being supportive of your issue and your profession. Offer your assistance and expertise. Inform them of CalCPA's Financial Literacy program and offer to help them set up a financial literacy workshop in their district. Remind them that you are the face of the CPA profession in their district. A good representative will recognize your leadership in the community and profession and will remember you when the issues arise in the future.

Ask Questions—Get to Know Your Representatives

- What do you think are the top issues currently facing California?
- How can we, working together, continue to grow the state's economic viability? How can we help you and your constituents?
- What would you like to see from the CPA profession?

Share What You Are Seeing in Your Community

Legislators want to hear from you about what you are seeing in the community. Take the opportunity to share what you are seeing as you work with and advise clients.

- What business issues are you and your clients facing?
- How is California's economy impacting you, your firm, and your clients?
- What issues are you seeing that are unique to your community?

Find the Best Financial Literacy Contact

Each Legislative office is organized differently, including staff responsibilities. When discussing CalCPA's financial literacy program, be sure to get the name and contact information for the appropriate staff member to follow-up about partnering on a financial literacy event.

Tips for Making Your Legislative Visits Successful

Going into your meeting with a legislator, it is essential to have a concise and organized plan. CalCPA has developed the following recommendations to ensure a successful meeting with legislators.

Before the Meeting

- **Learn the Issues:** Be familiar with the issues you plan to discuss. You do not need to be an expert, but must be able to express the two or three most important things that your representative should know about the issue.
- **Arrive Early:** Your legislator and their staff have very tight schedules, so it is important to be on time. Additionally, don't be offended if they are running late. Be prepared and flexible about the meeting time.
- **Organize Your Group:** Your meeting with legislators may include other CalCPA members, or it may be on your own. Organize a strategy before the meeting. If you are in a group, pick a team leader and assign talking points to each person. This way, everyone will get to speak and provide his or her personal experiences to the meeting.
- **Business Cards:** Bring plenty of business cards and leave your contact information with your legislators, their staff and your CPA colleagues.

During the Meeting

- **Meeting with Legislator's Staff:** You may meet with staff from your legislator's office. Don't let this detract from your meeting. In fact, much of the work is performed by the dedicated and talented staff. Don't underestimate their importance.
- **Limited Time:** Your meeting may be scheduled for approximately 15-20 minutes. Be prepared, speak clearly, stay on message and discuss the relevant issue you are advocating.
- **Be Polite:** Policy issues can be sensitive topics. Don't get upset or take it personally if your legislator does not necessarily agree with you. Politely and respectfully present your points. Let the facts power your case, not your emotions. You will have much more success this way.
- **Don't Be Afraid to Say "I Don't Know":** It's better to say that you do not know the answer than to give incorrect information. Let the legislator know that you will find out the answer and will follow up.
- **Don't Discuss Campaign Contributions:** It is against the law to discuss campaign issues together with specific policy issues. Do not mix the two.
- **Summarize:** Before you leave, run through the points discussed during the meeting. Remind the legislator that you and your colleagues are available as a resource, and remember to thank the legislator for their time.

After the Meeting

- **Follow up:** After the meeting, send a thank-you note to your legislator and their staff. Provide answers to any follow-up questions to which answers were not readily available. Let them know that you look forward to working with them in the future and possibly seeing them in the district.
- **Ongoing Communication:** Build on the relationship you have established. Stay in contact and provide any updates to your legislator on the issues you have discussed or any other issues that may arise.
- **Feedback:** Write down any follow up, comments or issues that CalCPA's government relations team will need to do with the legislator or their staff.

Finally, and most importantly, **have fun!** This is a great opportunity that many people do not always have. Enjoy your time with your legislators. Make friends and build connections!
