



MODEL POLICIES FOR ADOPTING POSITIONS ON STATE LEGISLATION

Throughout the year, CSDA will send out a *Call to Action* on a specific bill or issue that significantly impacts the special district community. Likewise, a special district may choose to take a position on a piece of legislation that specifically impacts its services in a positive or negative way.

Formally registering your district's position on legislation is a fundamental step in order to impact policy decisions made in Sacramento.

Top five reasons to weigh in on state legislation:

1. **TELL YOUR STORY.**
Will your district be unable to start a new project because of a bill or be forced to spend more money to meet a new state mandate? Lawmakers are interested in hearing your story and understanding how a piece of legislation would impact your district.
2. **CONSTITUENTS MATTER.**
Legislators are particularly interested in knowing what their constituents think about bills or other policy decisions before casting a vote. Remember *your* constituents are also your legislator's constituents and legislators are ultimately responsible to those that elect them.
3. **SHARE YOUR EXPERTISE.**
In 2011, the legislature sent the least amount of bills, 870, to the governor's desk. In 1990, the legislature sent the most bills, 2,143, to the governor's desk. Whether it's a few hundred or a few thousand, lawmakers are voting on far more bills than they may have specialized knowledge on. Special districts should take the opportunity to serve as experts on the bills that affect them and help lawmakers understand the impact of pending legislation.
4. **POWER IN NUMBERS.**
There are 2,160 independent special districts in California. If every district sent a position letter on a bill that impacted special districts, imagine the effect it could have.
5. **ACT BEFORE IT'S TOO LATE.**
Special districts are on the frontline implementing policies created by the legislature. Let lawmakers know what a bill means to your district *before* the bill is signed into law.

Establishing a district policy

Response time is important once CSDA sends out a *Call to Action*. CSDA may ask that districts send in a letter when a bill is set to be heard in committee or on the Assembly or Senate Floor. In those cases, districts may not have significant time to submit their position formally. Having a process in place for adopting a position on state legislation will shorten response time and ensure that your district's voice is heard!

In setting a policy on how your district adopts positions on bills, the process should specify who is authorized to sign the position letter. CSDA typically provides sample template letters on *Call to Action* bills. Districts simply need to add a sentence about what their district does and how the bill will specifically impact their district.

This document suggests four different model policies that districts may choose to adopt, dependent on your district's preference. Whether your district adopts one of the four model policies outlined below or some variation

of these policies, it is most important to adopt a policy that is manageable, consistent and tailored to the specific needs and culture of your district.

Model Policy One: *The General Manager or Designated Employee Adopt all Bill Positions*

Often, the general manager, legislative staff or some other designated employee has the authority to write and sign position letters. This option is less formal, less procedural but more time efficient. However, this option is not used by all districts. Some districts do not allow general managers or legislative staff to send a letter of formal opposition or support without the approval of their board of directors/trustees.

Pros:

- A legislator can change the content of a bill in a matter of days and letters need to be sent out as quickly as possible in order to let the legislature know where your district stands.
- Certain bills are obviously detrimental or beneficial to your district and a position may not require a time consuming process.

Cons:

- The governing board does not have an active role in the deliberation of bill positions.

In cases where the general manager or other designated employee has the authority to adopt a position on a bill, follow these basic steps:

1. Identify bill through CSDA *Call to Action*.
2. Review bill and determine impact of the bill on your district.
3. Draft letter or use CSDA sample template letter.
4. Include facts, stats, examples and cost estimates when possible. (See page 15 of the *CSDA Grassroots Advocacy Guide* for “Keys to Successful Letters”.)
5. Designated district employee/official signs letter and provides copies to the board of directors/trustees, per district’s policies.

Model Policy Two: *The General Manager along with the Board President Adopt Bill Positions*

For districts that favor the expediency of model policy one, but would prefer the governing board to have some input on bill positions, model policy two may be appropriate. This policy allows the general manager to adopt bill positions, but only with the approval of the board president.

Pros:

- Quicker response time, as full board approval in a regularly scheduled meeting is not required.
- Board president can provide a board of directors/trustees point-of-view as bill positions are finalized.

Cons:

- The full governing board does not have an active role in the deliberation of bill positions.

In cases where the general manager needs the board president’s approval to adopt a position on a bill, follow these basic steps:

1. Identify bill through CSDA *Call to Action*.
2. Review bill and determine impact of the bill on your district.
3. Draft letter or use CSDA sample template letter.
4. Include facts, stats, examples and cost estimates when possible. (See page 15 of the *CSDA Grassroots Advocacy Guide* for “Keys to Successful Letters”.)
5. General manager and Board President, or one official with the consent of the other, signs letter and provides copies to the board of directors/trustees, per district’s policies.

Model Policy Three: *The Board of Directors/Trustees Adopt All Bill Positions*

This option provides the greatest oversight, yet, it is less responsive to significant, spontaneous changes in the legislature.

Pros:

- Most thorough.
- The board has the ultimate and greatest influence in decision making for the district.
- The governing body is fully aware of all legislative actions affecting their district.

Cons:

- District boards that do not meet frequently may find this method does not allow the opportunity to weigh in on important legislation in a timely fashion.

In cases where only the board of directors/trustees has the authority to adopt a position on a bill, follow these basic steps:

1. Identify bill through CSDA *Call to Action*.
2. Review bill and determine impact of the bill on your district.
3. The general manager or legislative staff adds bill to the agenda for the next board meeting.
4. The board of directors/trustees vote to adopt a position on the bill.
5. Draft letter or use CSDA sample template letter.
6. Include facts, stats, examples and cost estimates when possible. (See page 15 of the *CSDA Grassroots Advocacy Guide* for "Keys to Successful Letters".)
7. Designated district employee/official signs letter and provides copies to the board of directors/trustees, per district's policies.

Model Policy Four: *General Manager Adopts Bill Positions Consistent With Policy Principles Set by Board of Directors/Trustees*

This policy gives staff the flexibility to adopt positions on legislation while allowing the board of directors/trustees to set policy principles to guide staff's action on bills. The board of directors/trustees pre-establishes various policy principles and, as long as the bill position fits within these principles, staff is authorized to take a position without board approval. For example, a district may adopt a policy principle that says the district will oppose any property tax redistribution formula that is not fair and equitable. A bill that proposes to change the property tax formula to shift dollars away from special districts would warrant an oppose position as this fits within the scope of the policy principle. If a policy principle is nonexistent or does not provide clear guidance, then the bill position shall be brought before the board of directors/trustees for a vote.

Pros:

- Offers both board oversight and the ability to give a quick response in certain circumstances.
- Provides general managers the tools to take action on legislation that fit within the board's policies.

Cons:

- Some bills may not fit within the scope of adopted policy principles, which would cause bill positions to go through the lengthy board approval process.

In cases where the bill fits within the established policy principles follow the steps provided in **model policy one**.

In cases where the bill does not fit within the policy principles, follow the steps provided in **model policy three**.

Staff should regularly review district policy principles and bring additional and amended principle recommendations before the board of directors/trustees for review and approval.

As noted above, CSDA provides template letters to districts when a *Call to Action* is sent out. For information on writing a support/opposition letter on a bill of interest and keys to successful letter writing, please see the *CSDA Grassroots Advocacy Guide*, available at csda.net or by calling toll-free 877.924.2732.