



Tips for Meeting with Your Legislator

THE INVITATION

1. Find your legislator by going [here](#). Enter the address of the village. It will show both your Assemblymember and Senator.
2. Make a phone call to the district office to invite the legislator to an event or meeting. The phone number will appear on the legislators' web page.
3. If there is someone you know, ask for them. If you do not know anyone, tell the person who answers the phone that you are calling to invite the legislator to an event, or that you are calling to set up a 30-minute meeting with them.

"Hi, my name is (your name), and I am calling for (name of village.) I am a constituent of the Assemblymember/Senator (name), and our village serves their constituents who are 60 and older. We would like to tell (name) about the work we do in the district to support older adults to remain independent in their homes. It's been a while since we saw (name) and we are excited to share our progress.

Or

"We would like to invite the Assemblymember/Senator (name) to attend our upcoming event so that they can learn how our organization supports older adults to remain independent in their homes. "

4. Discuss the details of the meeting or event with the staff person, or with the person they refer you to. Include date, time, location, type of event, meeting on zoom or in person.
5. If they tell you they will get back to you, then stay on top of the request and call back to confirm a date and time.

6. Send a follow-up email to the person you spoke with: “Thanks for talking with me today. I want to follow up the call with this formal request for (Assemblymember/Senator) to meet/attend our event. We are excited to share our model of care and our impact with the Assemblymember/Senator. I have attached our latest annual report/flyer/other information for your review (if you have something to share).”
7. The week before event or meeting, call to confirm the details and send a confirmation email. Repeat a day before the event or meeting.

PREPARATION FOR THE MEETING

1. Select several people to attend the meeting. You may have a staff person, a board member, and a member who can talk about how the village:
 - Helped them stay engaged in life with meaning and purpose
 - Helped them stay connected during COVID
 - Support helped them as a caregiver
 - Has enabled them to live at home with a sense of safety and security, etc.

These examples are “hot topics” right now.

2. Prepare the meeting attendees in advance. Give each one a role and a couple of talking points (see outline below). Rehearse on the phone, via Zoom, or in person a few days before the meeting.
3. Determine the materials you will share. The Village Movement California Impact Report and how we support the states Master Plan for Aging ([link here](#)), a brochure, an annual report, a newsletter, etc. It is a good idea to put together a folder of information.
4. Research the elected official at their website. What do they say about themselves? What values do they have? Think about how you will connect to these values. Ask people in your village and in your friends/ & family circle about the legislator. What do they know about the legislator?
 - Think about the connections you have with them, for example people you know in common that might elevate your profile, causes you’ve worked on, the school their kids have attended. Personal connections can be a bridge for conversation.

5. Prepare a few statistics:

- Size of your community. Number of members and volunteers.
- Service area – neighborhoods, cities, communities.
- Number of years in operation.
- If you have it, number of volunteer hours contributed to the village in the past year or other time-period.
- If applicable, type and number of services your village provided, such as number of rides to medical appointments, number of online and in-person social gatherings, number of online and in-person educational workshops

6. Prepare some stories about your village's impact on people's lives:

- "Our caregiver group of village members meets weekly online on Zoom. The support group was a lifesaver during COVID when they were isolated, at home with their care partner."
- "Our recent survey showed that 25% of respondents were able to stay in their homes because of the village."
- "One of our members was hospitalized. Their family lives far away. Village members and volunteers visited them in the hospital, and then again when they returned home. We scheduled visits, food, and errands so that they could focus on their healing."

7. Dream a little! Think about what your village could do with \$5,000, \$20,000, \$50,000 additional, state funding, and tell the legislator this!

- Hire a staff person to support more volunteers so that you can help more older people.
- Hire a staff person to build relationships with communities that aren't yet part of the village.
- Subsidize memberships of lower income older adults.
- What else?

THE MEETING

Hold the meeting in your office, in a coffee shop, on Zoom. Here's an outline:

- I. Welcome and introductions.

Welcome the legislator, and/or their aide (they might send a staff person at the last minute. Be gracious and welcoming). Allow your villagers to introduce themselves

- II. Review the purpose of the meeting – we want to tell you about our community and how we support older adults to age well at home. We know you care about older adults in the district.

- III. Make your presentation:

- A. We are a membership organization led by older adults that provides supports and services to older adults so that they can age independently at home
- B. We are a community of # - members and volunteers serving the areas of (geographic areas)
- C. We've been working here for # years
- D. We offer programming to help older adults stay socially connected and engaged, we help older adults learn new things and plan for the transitions of aging, we have a strong corps of training and vetted volunteers who offer practical support with the things that assure people are going to stay healthy and safe in their homes. We provide referrals to services that we don't offer.
- E. Some of our partners are (list your partners)
- F. We charge dues to help cover the cost of running the office, the software, the volunteer training, the staff (if you have staff). We also raise money to subsidize dues. The dues give us a base of funding, and also help us know who is part of our community.
- G. Most of our members are not poor enough to qualify for Medical and all the older adult services Medical offers, but they don't make enough money to pay for caregiving on their own.
- H. We are a member of Village Movement California, the statewide coalition of villages. Together with Village Movement California we made sure villages are included in the Governor's Master Plan for Aging.

- I. Here are some examples of our work and our impact (invite people to tell their stories, then add more data if you have it)
- IV. Ask the legislator what questions have, and how your village might help them
- V. Pitch your request; we'd like to keep you informed about our work in the community. We'd like you to know us better. We'd like you to support Village Movement CA's budget request in the upcoming legislative session to fulfill the Master Plan for Aging's village goal and extend these communities to thousands more people in the state.

Ask for additional questions and thank them for coming

MEETING FOLLOW UP

1. Meeting follow up – send a handwritten thank you note to the legislator as well as an email. The email can include any materials or answers to questions that came up during the meeting.
2. Over time, send the legislator updates, invitations, newsletters (add them to your mailing list)

EVENT PREPARATION

1. Assign someone to look for the legislator and to greet them as soon as they arrive, and to walk them out of the venue.
2. As soon as possible after they arrive, announce they are here. Address them as Senator, Assemblymember, Congresswoman, etc., Full name, and state their position
3. If possible, ask them to say a few words to the group

During the event, you will not be able to convey as much information as you do during a formal meeting. On the way out, brief them on the size and age of your village, hand them a packet of information (see suggestions above), and ask how you may follow up. Is there a specific staff person you could call.

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Congratulations! You now have a new champion!

SOME REFERENCE POINTS

Select a few key point, please include a mention of Village Movement California

- By 2030, California will be home to 10.8 million older adults, accounting for one-quarter of the state's population.
- 34% of our state's older adults will be moderate- and middle-income individuals who do not qualify for Medicaid benefits and may not be able to afford health and aging resources.
- California is responding to these demographic changes by implementing the Governor's Master Plan for Aging—a blueprint for aging in our state. The Master Plan includes villages as a strategic initiative and the village model supports the plan.
- The village model addresses these needs by providing a cost effective, community-based solution. More villages are needed in the state, especially in underserved areas. We ask our legislators and elected officials to support and help expand this model of care.
- We are members of Village Movement California, the statewide coalition of 45 village communities that reach 10,000 members, intergenerational volunteers, caregivers and family members
- The village model started in the late 1990s. There are now 300 villages across the country, including 45 in California—and more are launching in Village Movement California's Village Incubator!
- For the roughly 90% of older adults who want to age in place, the village model offers social connection, volunteerism, help with independent activities for daily living, and connections with licensed service providers
- Villages offer a vital response to the economic challenges arising from our state's rapidly growing demographic of moderate and middle-income older adults preserving state benefits for those most in need.
- Cure for Loneliness and Social Isolation: Villages help build meaningful connections among older adults and between generations that strengthen the mental, physical, and social health of people in the community.