



CALIFORNIA CHIROPRACTIC ASSOCIATION

***Grassroots Training
And Key Doctor Manual***

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**Grassroots
Advocacy**

At it's finest...

This is how we do!

Grassroots Training And Key Doctor Manual

What Is Grassroots Lobbying?

Organizations such as the California Chiropractic Association (CCA) that are successful at influencing policy-makers frequently increase their effectiveness through the mobilization of local community support, commonly known as working at the grassroots.

The central reality for chiropractic in California is that it is a legislated profession. Government has a dramatic impact on you personally - as a chiropractor, as a small businessperson, and as a Californian.

However, you have the power to shape government actions affecting your profession. Your power stems from your ability to influence opinion leaders and public officials and the decisions they make. It may be, however, that you are not aware of your own strength because you have never exercised it.



You already have considerable clout. You are one of your community's respected health care professionals. You may be a member or leader of an important community organization. It is likely that you are a friend or neighbor of key community leaders. All of those connections in your community make you a valuable resource for yourself and your profession.

This manual details the tools available to the chiropractic profession collectively, and you individually, to affect those outcomes. It also suggests things you can do to assist CCA by representing the profession in your community.

Contained in these pages are practical steps for grassroots action in your community and ways to work on behalf of candidates for public office. It provides specific information on how you can make a difference for your practice, for your patients, and for your CCA.

CCA's Political Action Team & The Key Doctor Program

The CCA's political action team consists of the CCA Governmental Affairs Department, the CCA Legislative Action Committee, the CCA Political Action Committee Trustees, the CCA Governmental Affairs Department staff and the CCA contract lobbyist. Key Doctors are also part of CCA's political action team.

The Key Doctor Program is a central component of the Governmental Affairs Department. This grassroots program is designed to educate the legislature about the profession and scope of doctors of chiropractic; establish and maintain positive relationships with legislators; and provide information to the Governmental Affairs Department and CCA District presidents regarding legislative concerns.

Key Doctors act as contact liaisons between his or her assigned legislator/s, the CCA Governmental Affairs Department and his or her local CCA district president. The Key Doctor Program Committee Chairperson in conjunction with the Governmental Affairs Department Chairperson and Director appoints Key Doctors. The goal of the Key Doctor Program is to have at least one doctor of chiropractic assigned to each legislator.

Realtors, physicians and lawyers all have embraced state and local political activity as part of their professional cultures. California chiropractors should do the same - and many do. CCA efforts can only be successful if its political activity is widely embraced, well-coordinated and efficient.

Each legislative session, the CCA Legislative Action Committee and the CCA Governmental Affairs Department develops a legislative package which is approved by the CCA Board of Directors. From this package, CCA takes positions on bills of importance to chiropractic in each session of the Legislature. To keep you abreast of this legislation, CCA produces fact sheets and legislative alerts. When needed, CCA will issue a call to action in support of or opposition to legislation.

The professional staff at CCA can provide the background information and technical assistance to help you carry out a political action program. But it is your efforts and the relationships you will develop as a Key Doctor that will lead the way in delivering the chiropractic message. You put the human face on chiropractic's message. When your legislator considers his or her position on our issues, you are the person they will think about.

Key Doctor Responsibilities

- Establish and maintain a positive relationship with their assigned legislator/s. The Key Doctor is expected to meet regularly with their assigned legislator/s.
- Go to your assigned legislator/s website and sign up for their newsletter. Oftentimes, legislators hold free local events for their constituents. This is a great opportunity to get great "face time" and show your support.
- Provide pertinent legislative information to their assigned legislator/s. The CCA Governmental Affairs Department will handle the dissemination of legislative updates and alerts to the Key Doctors.
- Inform their local CCA district president regarding any legislative updates and coordinate with other Key Doctors in their district to provide legislative information to district members at local district meetings.
- Inform CCA Governmental Affairs Department of any legislative issues and developments regarding their assigned legislator/s and local politics if pertinent.
- Keep informed and be able to articulate current literature, rationales within the chiropractic profession. CCA Governmental Affairs Department will provide Key Doctors with pertinent research and will routinely provide any new studies as necessary.
- Assist their local CCA district in endorsing candidates. In coordination with the CCA Governmental Affairs Department, the Key Doctor will interview candidates for the state assembly or senate for possible district endorsement, thus giving the district and the profession an effective voice in supporting chiropractic-friendly candidates and a local connection should the candidate win.

- Actively support candidates favorable to the chiropractic profession and endorsed by the district. When appropriate, the Key Doctor will be responsible for organizing a district-sponsored fundraiser for a state office candidate, which will provide an opportunity to forge close ties with a possible officeholder.
- **Attend the annual CCA Legislative Conference in Sacramento.**

Key Doctor Qualities

- **Be Articulate** – Above all, Key Doctors must be able to communicate clearly and easily with their assigned legislator/s and the media. Key Doctors possess the ability to convey complex legislative or regulatory issues in an informed, engaged and highly professional manner. To do this well, Key Doctors must review and practice any talking points provided by the CCA well in advance to meeting with their legislator/s or the media.
- **Be Responsive** – Key Doctors will be contacted email on a regular basis to provide a variety of grassroots support – from meeting with their assigned legislator/s and making key phone calls to providing local media with timely opinion editorials and attending local fundraising events. To make CCA's grassroots program effective, it is imperative that the Key Doctor tasks are completed within the required timeframe and all results are reported directly to the CCA Governmental Affairs Department.
- **Be Focused** – Key Doctors refrain from discussing non-chiropractic politics such as immigration, gun control, abortion, or other hot topics of the day. A Key Doctor possesses the temperament and discipline to stay on point, and if led off point by the legislator or staff, will have the presence of mind, tact and diplomacy to gently refocus and stay focused on the point and the message. The Key Doctor does not mention his/her feelings on the non-chiropractic issues because of the stronger duty to work for and protect the profession. The Key Doctor is willing to put personal politics aside for the greater good of the profession.
- **Be Committed** – Key Doctors are committed to both the short and long term goals of CCA's legislative plan. They understand their efforts increase the profession of chiropractic's success.
- **Be Reasonable** – Key Doctors understand that grassroots lobbying can be a long and sometimes frustrating process. However, Key Doctors do not take it personally when a key vote is lost or a legislator was less than friendly. Key Doctors will use these opportunities to refine their lobbying efforts.
- **Be Mindful** – Key Doctors understand that they put a "face" on the profession of chiropractic and represent the concerns of their esteemed colleagues and the legislative intent of the CCA.

But I'm not sure I have the time...

Participating in chiropractic's political action team will not and should not be an all-consuming activity. You have a practice to run. You have patients who depend on you. You have a family that needs your attention. And you have earned a right to enjoy your leisure time.

That's the strength of the CCA – a professional and highly capable staff, a cadre of politically active chiropractors among CCA's members and an efficient program to make the best use of your time.

Chances are you are already deeply involved in political activities if you:

- Are a member of civic, church and community organizations
- Have important friends and neighbors
- Have children who attend school or play sports with children of other important opinion leaders
- Read your local newspaper or watch your local television news each day

The difference is that now you are being asked to pay a little closer attention to the newspaper, to view your friendships and associations with a little keener eye to your profession, and to help enlist the assistance of others in carrying chiropractic's message into the community.

A few minutes each day devoted to political activity by you and other chiropractors can add up to thousands of hours a year in support of chiropractic issues. Simple, easy gestures like delivering pizzas to a campaign headquarters or sending a note to an elected official or candidate pointing out a favorable news article can cultivate long-lasting relationships that pay off for the chiropractic profession.

Navigating The World Of A CCA Key Doctor

CCA Governmental Affairs Website – calchirogov.org



At calchirogov.org, you will find everything related to CCA Governmental Affairs. Be sure to check out this important resource. This website is your one-stop-shop from action alerts, information about the annual Legislative Conference, to chiropractic research.

On this site, we also have a dedicated Key Doctor page - www.calchirogov.org/key-doctors.html. You can view the Key Doctor Training video, download current talking points and view important legislative links. CCA staff keeps this page updated on a regular basis, so check back often.

CCA Governmental Affairs Department

The CCA Governmental Affairs staff are here to help you with every aspect of being a Key Doctor. The staff can provide you with a bevy of helpful background information and keep you updated on legislative activity. Please reach out to them!

Jillian Hacker, CCA Governmental Affairs Director – jhacker@calchiro.org, 916.648.2727, ext. 21.

Michelle Bancroft, CCA Governmental Affairs Associate Director – mbancroft@calchiro.org, 916.648.2727, ext. 18.

Annual Legislative Conference



CCA's annual Legislative Conference is where Key Doctors shine and attending is one of the most important activities of being a Key Doctor duties.

A component of the Conference is 15-minute lobbying meeting with legislators at their Capitol offices. CCA assigns Key Doctors as the lead on these meetings. This ensures the lobbying meeting will be successful and other doctors and students will be able to "see how it's done".

Meeting with your legislator/s at the Capitol shows your depth of commitment to the relationship you are establishing locally. And as a constituent, your words carry much weight and the legislators and their Capitol staff are aware of the time and expense it takes to attend a lobby day. Additionally, as you grow your relationship with your legislator/s locally, they (as well as their staff) will expect to see you for our lobby day. So don't disappoint them!

I'm Meeting With My Legislator – Help!



Talking to elected officials and their staff members shouldn't be an ordeal, difficult or complicated. Just keep in mind, legislators and legislative staff are human – just like you. Your meeting is to provide the member with information to better able them to meet their constituent's needs. The life blood of a legislator is your vote and they are responsive to your concerns.

If CCA asks you to meet with your legislator/s locally, we will provide you with leave-behind materials as well as talking points to assist you. You can also find these materials on the

Key Doctor section of the Governmental Affairs website - <http://calchirogov.org/key-doctors.html>.

Here are a few "tricks of the trade":

- **Schedule meetings with your local legislators in their district offices on a Thursday afternoon or Friday.** State legislators have schedules that keep them in Sacramento from Monday to Thursday. The session of the California Legislature starts in January and ends in September.
- **Be patient.** A staffer may tell you that he or she will need to get back to you after checking with the legislator before scheduling an appointment.
- **Be open to talking to staff.** Be firm about wanting to see the legislator, but if that's not possible, go ahead and agree to meet or talk on the telephone with the district aide.
- **Be prepared.** Review the leave-behind materials and talking points prior to your meeting. Know where your legislator stands on the issue and what his/her questions are likely to be. CCA staff can assist you if in doubt.
- **Provide the leave-behind materials.** This is a great resource for legislators and legislative staff when as they determine which way to vote on an issue.
- **Develop responses to anticipated questions, and answer those questions directly and briefly.** If you don't know the answer, say you don't know – but be sure to offer to find the answer and drop a note to the elected official providing the answer to his/her question.

- **Personalize your arguments.** Be specific about how legislation will impact you as well as consumers, others in your community and decision-makers.
- **Be accurate and factual.** Credibility will help you build trust.
- **Be concise, focused and emphatic.** Boil your message down to a couple of sentences. And remember, let your opponents raise their own arguments, don't do it for them.
- **Listen.** Don't lecture or patronize an elected leader. Take time to really listen to what they are saying – you may learn something important that will help us in the future.
- **Be cooperative.** Try to comply with reasonable requests, particularly for information.
- **Be understanding.** If you understand their problems and attitudes, you'll be more successful in getting them to understand your problems and attitudes.
- **Send a follow-up letter to the legislator and staff.** Thank him/her for meeting with you; summarize the main points you raised in your discussion and answer any questions left unanswered.

Operation Hand Check

Each year the CCA Political Action Committee Trustees allocate CCA-PAC funds to chiropractic friendly legislators. Operation Hand Check is the brain child of Dr. Brian Stenzler, CCA President and phenomenal Key Doctor.

To make these donations most impactful, we encourage our Key Doctors to deliver the checks personally. This is a great way to further relationships and promote more good will.

Step 1. CCA Governmental Affairs Department staff (Michelle Bancroft) will contact each Key Doctor via email if the CCA-PAC has allocated funds to his/her legislator/s.

Step 2. Once contacted, make an appointment locally with your legislator/s.

- Call the legislator's district office and ask to speak with the scheduler.
- Tell the scheduler you'd like to set up a meeting outside the office to give the legislator a donation from CCA.
- Meeting over a cup of coffee or a meal, at a location of the legislator's preference would be wonderful.
- You may be told the legislator does not accept donations personally. Should this occur, ask them who you should contact to find out when the legislator's next fund raising event will take place.

Step 3. Email Michelle Bancroft with the date and appointment time at mbancroft@calchiro.org.

Step 4. Michelle will submit the check request and have the check mailed directly to your office. The check request process generally takes 3-5 days. If need be, she can expedite the process and overnight the check.

Step 5. Meet with your legislator and provide the check.

- Give the legislator the donation and tell them CCA is happy to support them.
- Make small talk. **NOT** policy talk.
- Are you enjoying the break from the legislative session?



*Operation Hand Check!
Key Doctor Dr. Brian Stenzler,
Assembly Member Toni Atkins,
Key Doctor Dr. Matt Hubbard*



- Have you had a chance to take some time off?
- Where did you take your family for vacation? Share your family vacation, etc.
- When you've finished your coffee/meal thank the legislator for their time and tell them you'll be calling his scheduler to set up a meeting in his office to discuss some policy issues

Step 6. Take a picture with your legislator. If appropriate, take a casual picture/selfie with your legislator. Let the legislator know we will only use the picture to promote CCA legislative grassroots activity. Email your picture/s to Michelle at mbancroft@calchiro.org.

Step 7. Check in with Michelle to let her know about your meeting at mbancroft@calchiro.org or 916.648.2727, ext. 18.

*Operation Hand Check!
Assembly Member Cheryl
Brown and Key Doctor
Dr. Barbara Stanfield*

Election Time - Candidate Endorsement Process

Another essential role for the Key Doctor is to ensure that the incumbent legislators and the leading candidates running for state Senate and Assembly from their CCA district view chiropractors as a political force in their community.

General elections happen every 2 years. For each legislative seat, CCA seeks to have an endorsement for the candidate that will be serve the profession. When all local endorsements are completed, CCA publishes a professional Voter Information Guide that will be distributed to the California chiropractic profession and to the legislature.

All candidate and incumbent endorsements are vetted and approved by each local CCA district. CCA will provide our recommendations regarding endorsements, but it is up to the local CCA district leadership to approve and vet each endorsed candidate.

Key Doctors play a central role in the Candidate Endorsement Process. Working with their local CCA district leaders, Key Doctors interview the candidates in their area and provide their recommendation to their local leadership. From there, a local district meeting can take place for district members to approve.

Here is how the process works:

1. CCA will provide each Key Doctor and CCA district leader with the candidate/s running in each CCA district and CCA's recommended candidate/s endorsement.

2. Key Doctors will set up an interview time and location with each candidate. Candidate must be interviewed before an endorsement can occur. Interviews can be done at a district meeting, in the candidate's campaign office or over lunch.



3. Interview each candidate. Interviews are an opportunity for you to educate the candidate about chiropractic.

- **Start off by explaining the process to the candidate.** For example: *We are interviewing each candidate for this seat. We will get back to you with our decision within two weeks. If we choose to endorse, we will send a letter to each chiropractor in the district announcing the endorsement. Additionally, we will instruct the doctors to send a letter to each of their patients about the endorsement. Finally, the endorsement will be mailed to 12,000 doctors of chiropractic statewide as part of CCA's voter guide that is published in October. CCA also has a political action committee to financially support candidates that support our issues. Decisions to financially support candidates are made in Sacramento with input from us and if we choose to endorse, I will notify our PAC of the endorsement for its consideration. Do not promise a financial contribution at this meeting.*
- **Educate the candidate about CCA and our most important issues.** For example: *CCA is a membership association with over 2000 members. We have a Governmental Affairs Director and Chief Operating Officer, Cris Forsyth and a top five lobbying firm, Governmental Advocates, representing us in Sacramento.* Talk about some of the most important issues facing the profession. Don't talk about specific bills or proposals.
- **Provide the candidate the *Candidate Interview Questions*.** You can either provide these questions via email before the interview or ask these questions during the interview. CCA staff will provide you the *Candidate Interview Questions*.
- **Ask the candidate how the race is going and why the candidate things they will win.**
- **Thank them for their time.**

4. After the interview, communicate with CCA. You may contact Jillian Hacker at jhacker@calchiro.org or at 916-648-2727, ext. 21 regarding the candidate interview and how the candidate responded to your questions. Jillian may be able to provide you with additional information about the race that the district leadership may need to know before deciding on an endorsement.

5. Vote. At the next district meeting, the district should vote if it wants to endorse any candidates.

6. Call or email CCA regarding the endorsement vote outcome. Contact either Jillian Hacker at jhacker@calchiro.org or at 916-648-2727, ext. 21 or Michelle Bancroft, mbancroft@calchiro.org or at 916-648-2727, ext. 18 to inform the Department.

7. Follow up. Send a letter to the candidates you interviewed but did not endorse to notify them of your decision and thanking them for their time. **Any candidate that is endorsed should be contacted by phone directly.**

8. Send endorsement letter. A sample endorsement letter that can be used for doctors or patients is located at the end of this document.

Once an endorsement is secured, the work has just begun. It is essential the district maintain contact with the candidate. This contact can include in-kind donations to the candidate such as volunteering with the campaign, providing office supplies, buying food for campaign workers, etc. District members may individually donate monetarily to the candidate's campaign and attend fundraising events for the candidate. The district may want to hold a local fundraiser of their own for the candidate. If the district wishes to hold a local fundraiser contact CCA for information and assistance.

Being An Awesome Key Doctor Is An Ongoing Process & An Art

Become knowledgeable about issues affecting your profession. The more you know about chiropractic and health care issues in general, the more effective you will be as a personal advocate on behalf of your profession. This is more than being well educated in the practice of chiropractic. This means knowing those key issues that affect your ability to practice your art – from restrictions on scope of practice to licensure to workers' compensation and healthcare reform developments.

In addition, you should know about the economy and business issues. Minimum wage and overtime, local population growth or loss, and tax issues all are critical to your success as a small businessperson.

It is also important to understand the broad implications of issues that are important to you. You will be much more successful if you articulate the benefits for consumers or the public generally rather than speaking of issues only in terms of the self-interest of chiropractors. Your cause is helped if you can speak intelligently, credibly and accurately on a subject.

Grow it locally! Get to know elected officials and opinion leaders in your local area. Be pro-active with legislators. They really do want to know you. But, you can't build influence overnight. It's a process that can take months or years.

Attend local community events and forums. If you support a legislator or candidate, demonstrate your approval by volunteering for campaign activities such as precinct-walking and telephone banks or by making a contribution to the campaign. **Legislators won't know who you are unless you take the initiative and get to know them.**

There are many ways of building a relationship. Has your Senator or Assembly Member authored a bill that will benefit the district? Write letters to the editor of the local newspaper in support of what your elected official has done. They WILL take notice. Write letters of support directly to the official. If you haven't done so already, become a member of the organizations that your local elected officials tend to join also - organizations like rotary and chamber of commerce.

Take pains to keep in touch throughout the year – when they need you, not just at the 11th hour when you need them. It's easy to send a short congratulatory note when they win an election or award. Clip out a newspaper or magazine story favorable to the official and send it with a note: *I just wanted to make sure you saw this story. Nice job!*

Have a long term impact in your community. The best place to have an impact with elected leaders, opinion-makers and the public is right in your own community. You probably have influence there already, although you may not be aware of it.

- Pay close attention to your patients. Some of them may be public officials or their families. A good relationship with an elected leader may be as close as your examination table.
- Get to know the leaders in organizations that have a common cause such as chambers of commerce and associations representing health practitioners. These are organizations that regularly take positions on legislative issues that could affect you.
- Become a member of the legislative committee for your local chamber of commerce. It will give you exposure to state and local legislators – as well as provide a greater opportunity to learn about the legislative process.
- Seek appointment to state and local health-related boards and commissions.

- Be active in your neighborhood and in family-oriented organizations. Elected officials, public opinion leaders, key staff persons and their families go to your church, send their children to your schools, help coach the soccer team and are just as interested as you are in local Neighborhood Watch Programs.
- Make presentations to community forums. Many community service organizations accept speakers on a regularly basis. They provide valuable opportunities to present the chiropractic viewpoint on engaging topics. One or more chapters of each of these organizations may be present in your community:

Chamber of Commerce
Kiwanis Club
League of Women Voters
Lions Club
Rotary Club
Soroptimist Club
American Business Women's Association
National Association of Women Business Owners

Additionally, most towns have speaking forums that are unique to the community. You should check your local yellow pages or chamber of commerce to obtain a list of business and service organizations in your area. If you would like help in preparing a presentation, please don't hesitate to contact CCA.

- Pay close attention to sources of information in your community. Local and regional newspapers and television stations, cable television outlets, issues and candidate forums and on-line computer information services all can provide you with important information. When appropriate, share critical information with the CCA staff in Sacramento.
- You have a direct line to your community through the most widely read section of the newspaper: the letter-to-the-editor column. It is good forum for spreading the word on chiropractic issues – especially if you can demonstrate the impact on a personal level. And don't forget, elected officials and their staffs routinely scour this section to gauge public opinion.

CCA Governmental Affairs Department Contacts

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Michelle Bancroft, CCA Governmental Affairs Assistant – mbancroft@calchiro.org, 916.648.2727, ext. 18.

Addendum

Overview Of The California Legislative Process

The process of government by which bills are considered and laws enacted by the California State Legislature is commonly referred to as the Legislative Process. The California State Legislature is made up of two houses: the Senate and the Assembly. There are 40 Senators and 80 Assembly Members. The Legislature maintains a legislative calendar governing the introduction and processing of the legislative measures during its two-year regular session.

Idea

All legislation begins as an idea or concept. Ideas and concepts can come from a variety of sources. The process begins when a Senator or Assembly Member decides to author a bill.

The Author

A legislator sends the idea for the bill to the Office of the Legislative Counsel, where it is drafted into bill form. The draft of the bill is returned to the legislator for introduction. If the author is a Senator, the bill is introduced in the Senate. If the author is an Assembly Member, the bill is introduced in the Assembly.

First Reading/Introduction

A bill is introduced or read the first time when the bill number, the name of the author, and the descriptive title of the bill are read on the floor of the house. The bill is then sent to the Office of State Publishing. No bill except the Budget Bill may be acted upon until 30 days have passed from the date of its introduction.

Committee Hearings

After introduction, a bill goes to the Rules Committee of the house, where it is assigned to the appropriate policy committee for its first hearing. Bills are assigned to policy committees according to subject area. For example, a Senate bill dealing with health care facilities would first be assigned to the Senate Health and Human Services Committee for policy review. Bills that require the expenditure of funds must also be heard in the fiscal committees, Senate Appropriations and Assembly Appropriations. During the committee hearing, the author presents the bill to the committee and testimony may be heard in support or opposition to the bill. The committee then votes on whether to pass the bill out of committee, or that it be passed as amended. Bills may be amended several times. It takes a majority vote of the committee membership for a bill to be passed and sent to the next committee or to the floor. Each house maintains a schedule of legislative committee hearings. Prior to a bill's hearing, a bill analysis is prepared that explains the intended effect of the bill on current law, together with background information. Typically, the analysis also lists organizations that support or oppose the bill.

Second and Third Reading

Bills passed by committees are read a second time on the floor in the house of origin and then assigned to third reading. Bill analyses are also prepared prior to third reading. When a bill is read the third time it is explained by the author, discussed by the Members, and voted on by a roll call vote. Most bills generally require 21 votes in the Senate and 41 votes in the Assembly. Bills that require an appropriation, or that take effect immediately, ordinarily require 27 votes in the Senate and 54 votes in the Assembly to be passed. If a bill is defeated, the Member may seek reconsideration and another vote.

Repeat Process in Other House

Once the house of origin has approved the bill, it proceeds to the other house where the procedure described above is repeated.

Resolution of Differences

If a bill is amended in the second house, it must go back to the house of origin for concurrence (agreement on those amendments). If the house of origin does not concur in those amendments, the bill is referred to a two-house Conference Committee to resolve the differences. Three members of the committee are from the Senate and three are from the Assembly. If a compromise is reached, the bill is returned to both houses for a vote.

Governor

If both houses approve a bill, it goes to the Governor. The Governor has three choices: sign the bill into law, allow it to become law without his or her signature, or veto it. A governor's veto can be overridden by a two-thirds vote in both houses. Most enacted bills go into effect on the first day of January of the next year. Urgency bills and certain other measures, take effect immediately after they are enacted into law.

California Law

Each bill that is passed by the Legislature and approved by the Governor is assigned a chapter number by the Secretary of State. These chaptered bills are statutes and ordinarily become part of the California Codes. The California Codes are a comprehensive collection of laws grouped by subject matter. The California Constitution sets forth the fundamental laws by which the State of California is governed. All amendments to the California Constitution come about as a result of constitutional amendments approved by the voters at a statewide election.