



## State Legislatures Magazine: September 2001

Editor's Note: This article appeared in the September 2001 issue of NCSL's magazine, *State Legislatures*. To order copies or to subscribe, contact the marketing department at (303) 364-7700.

[Legislator Training 101](#)

[Avoiding Overload](#)  
[A Variety of Approaches](#)  
[Building Relationships](#)  
[Hands-on Training](#)

[Training California Style](#)

[Tips from the Experts](#)

---

## Legislator Training 101

With no time to waste, new legislators are getting trained faster and better than ever before.

By Bruce Feustel and Rich Jones

Three days after her election last November, California Assemblywoman Jenny Oropeza and 28 other members of the class of 2000 settle into their seats in Room 317 of the state Capitol to begin the first phase of a comprehensive training and orientation program conducted by the Assembly's CAPITOL Institute.

Created in 1998 to get California's term-limited legislators ready for the session more quickly (CAPITOL stands for California Assembly Program for Innovative Training and Orientation for the Legislature), the institute is the brain child of current Assembly Speaker Robert Hertzberg and trains lawmakers and their staffs throughout the year.

"Californians expect their representatives to hit the ground running. The courses offered by the CAPITOL Institute are our running shoes," says Hertzberg. "When I got here (in 1996), they just threw me the keys. We've worked hard to change that. This is all part of what we think is an extraordinary effort to become a much more professional and efficient Legislature."

After a brief overview, Oropeza and her colleagues divide into four groups to learn about their salary, health benefits, district office leases and other aspects of their new jobs as members of the California Assembly. Following lunch they move to the chamber floor where they sit at their desks, practice voting and try out their laptop computers. "It is exciting to see them on the floor for the first time," observes Cara Johnson, staff director of the institute. "Their eyes get wide, and the realization that they are now members of the Assembly sinks in."

The newly elected members return to the institute later in the month and again in December for more in-depth training on ethics, committee operations, floor procedures and time management. All of it is designed to give them a solid grounding in the skills and knowledge it takes to be an effective legislator.

California's efforts to improve and expand the training provided new legislators through the CAPITOL Institute are similar to programs in other states. At first, most new member orientation was one day or shorter and held right before the start of the session. It covered only basic housekeeping information, such as how members got paid, where they sat on the floor and where to go to get their bills drafted.

Many were not much more than meet-and-greet sessions intended to provide just enough information to get the new members started in their legislative careers. As legislatures expanded these programs, additional training tended to feature lots of panels with talking heads reviewing the functions of their agencies or describing detailed policy issues.

In most legislatures, lawmakers were expected to learn their craft by serving with and observing experienced members. Because of term limits and the growing complexity of legislative service, legislatures today no longer have the luxury of time for members to learn through observation and osmosis. They are using training programs to jump-start the learning process and have revised, revamped and retooled their orientation programs. The most significant changes are happening in the term-limited states where legislatures are relying

on training programs to counteract the effects of high turnover and loss of experienced members. But even those states without term limits are changing the way they prepare new members for legislative service.

#### AVOIDING OVERLOAD

One of the biggest challenges in training new members is how to convey a lot of information in a short time without overloading the members.

"We used to take them on an exhausting forced march to the sea," says Dan Chapman, assistant director of Colorado's Legislative Council, explaining that for four solid days they would bombard new legislators with information. "We have a multiphase approach now, where we provide the training in manageable chunks. The training segments are targeted for specific needs and separated to give recovery and reflection time." The approach is designed with open time for new legislators to get to know one another and get comfortable with their surroundings.

The Colorado experience is typical of many state legislatures. Leaders understand the importance of preparing new legislators, but the temptation is to cram too much into the training, risking meltdown and mutiny by the participants. "You have to resist the urge to cover everything," say experts like Kansas House Chief Clerk Janet Jones. "You have to prepare for members to feel overwhelmed. Allow time for their questions and let them get to know each other."

#### A VARIETY OF APPROACHES

To make its orientation program more manageable, Ohio leaders expanded it to the last full week of November and moved it from the State House to a retreat center outside of Columbus. In addition to formal presentations on legislative procedures, media relations skills and demographics, time was built into the program for informal interaction among the new legislators. Newly elected Representative Derrick Seaver, the youngest member of the Ohio House, found the training helpful and advised other states to set aside sufficient time for it. "We spent a week on the training at a time of the year when we had the time to spend on it. The length of the program allowed us to learn about the topics in some depth."

Ohio also organized an agency fair to present legislators with information about executive branch agencies without subjecting them to a series of mind-numbing presentations. State agency directors and top staff set up information booths in a meeting room and described their operations, answered questions and handed out materials. Lawmakers could focus on specific agencies and take home only the materials they wanted.

Missouri lawmakers visit institutions, programs and facilities funded, owned or operated by the state. Donald Prost, director of the Committee on Legislative Research, organizes the schedule at the direction of the Budget and Appropriations chairs. "We try to do a broad, well-rounded sample, seeing all the geographic regions of the state. We'll look at prisons, schools, colleges, hospitals, mental health institutions, even the TWA Dome." In the course of two weeks, the group sees diverse sights like the urban areas of St. Louis and Kansas City and the boyhood home of Mark Twain in Hannibal. Legislative and executive branch staff are always on hand to answer questions. In this way the new members get a broad understanding of executive branch functions and see firsthand how tax dollars are being spent.

Missouri's more traditional, Capitol-based training, now includes an additional week on the key roles of "lawmaking and appropriating," according to Darrell Jackson, director of House research. "Under term limits, the time to learn is gone. We have to spend a significant chunk of time to help them prepare."

Florida House Speaker Tom Feeney undertook a bold commitment to new-member training when term limits brought a 50 percent turnover to the House. Feeney was guided by two concepts. "First, a better informed legislator is a better legislator. And second, ideas are never to be feared," he says. "Always keeping these in mind, we worked very hard to make the program as broad as possible by including a range of topics, views and philosophies."

The speaker asked the James Madison Institute (JMI), a conservative "think tank" based in Tallahassee, to devise a training program for the House. "It was a tremendous opportunity," says JMI President and CEO Ed Moore. "We had the chance to provide 10 days of training on substantive policy issues with experts from around the country, all with an idea of replicating what they would face as legislators."

Obviously, a conservative public policy institute has a point of view, but Moore made sure to include minority party Democrats in the planning process, eliciting their suggestions to provide a balanced array of panelists. "We had to make it bipartisan and make it real," Moore says.

"We tended to use one-and-a-half-hour time blocks with several topics a day, so they could get used to switching gears," Moore says. "A lot of people who run for the Legislature are focused on only one or two issues, and the training helped them prepare for the reality of the session."

Although 10 days of training, split into segments, is quite a commitment, attendance stayed high and the evaluations were excellent. Also many panelists have been asked back to help with the work of the session.

#### BUILDING RELATIONSHIPS

As valuable as the information presented during formal training sessions is, another benefit most new lawmakers emphasize is informal interaction with their colleagues. "I'm not the kind of person who is going to stand around-I'm going to reach out to my fellow legislators. The training gave me a chance to do that," says Colorado Senator Deanna Hanna.

The CAPITOL Institute in California helps many new lawmakers develop camaraderie and forge relationships with colleagues, even those from the opposite party. These relationships have helped bring more stability to the Assembly.

"The institute gave us an opportunity, in a nonthreatening way, to build a foundation of trust and to hear each other's stories," says Assemblywoman Oropeza. "It's helpful to learn something about a person outside of the political arena. It gives you something to fall back on when you get into the heat of the session."

Legislators in Oregon, concerned with the lack of civility and decorum during the 1999 session, set out to change the tenor this year. The Senate and House both held retreats where new and returning lawmakers came together to discuss ways of improving communication, cooperation and civility.

"We wanted to stop the polarization, to get to a point where we know each other personally. We want to be able to disagree, yet remain friends," says Senator David Nelson. In the first exercise of the Senate retreat, each senator was asked to reveal something that the others didn't know about him or her. They wrote the information on a piece of paper and tossed it in a hat.

The group then pulled out and read each slip, guessing what "secret" matched which senator. Some were a little reticent to participate in the "touchy-feely" exercise, but they used a senator who was particularly good at easing tensions and interjecting humor as facilitator.

Nelson put down that he's a "Stephen minister," part of a faith-based caregiving group. "I'm not the first guy you'd think of in that role," Nelson notes with a chuckle, "but it does reveal something about how I try to build consensus."

"The whole session was fun and critical to the rest of the retreat," says Senator Avel Gordly.

Her favorite memory was during a moment of free time. A group of senators were playing a card game-members of both parties laughing and having a good time together. A Democrat who didn't know the game was being coached by a Republican who knew it well. "After the difficult, rancorous session we had last year, I was struck by how we had become just ordinary people having a good time," she says. "And that spirit carried over to the session."

Training in negotiation and communication skills, along with small group discussions to identify ground rules for interacting during the session, were also part of the Oregon House retreat. Time was allotted to social activities where the new and returning legislators could get to know each other.

"The days of relying on the 'school of hard knocks' are over," notes Representative Kurt Schrader. "We have to use training to help us set a better tone for the legislative process."

In a practice begun in 1998 by then Arkansas Speaker Bob Johnson, unopposed candidates are brought to Little Rock in groups of four to five for one-on-one training with the speaker, other leaders and staff. The leaders review the legislative process, get to know the prospective legislators and identify areas that the new members would like to concentrate on during the session. With short term limits and a biennial session, the leaders feel there is not enough time for people to naturally develop their skills and interests. They want to accelerate the process of identifying where the new legislators fit best in the legislature.

"Bringing the candidates in for training is very effective and helps me to get to know the prospective members well in advance of the session when things are very hectic," says Speaker Shane Broadway. "I recommend that future speakers continue this practice."

Ohio House Speaker Larry Householder conducted similar training for unopposed Republican candidates and those in safe districts. The candidates met bimonthly with the speaker and other House leaders, reviewed issues such as the state budget and school funding, and met with the heads of various state agencies. After the election but before they took office, House Republicans held their own retreat in addition to the one organized by the Legislative Service Commission. They reviewed issues, crafted an agenda for the session and held mock committee hearings.

"The training has been tremendous," says Representative Jean Schmidt. "The mock committee hearings were an excellent way for us to learn the proper protocol and decorum expected in committee and on the floor. As a result, we were better prepared for the session."

Because they have a long interim that is significantly different from the session and a large number of new members, the Arkansas House conducted a one-day training session in June to prepare representatives for work during the interim. They reviewed the interim schedule, described the work of interim committees and explained the type of staff assistance that is available. Throughout the interim, they will bring in the heads of major state agencies to discuss their operations and budgets as a means of informing new legislators about the functions of state government. The increased training responds to a desire expressed by the members for continuous training in addition to the orientation program.

"We need to be open to change and listen to the new members and what they need in terms of training," says Speaker Broadway.

"There is only so much you can give them at one time. We need to go back and review some of the information presented at the orientation. In addition, we want to use the interim to deal with specific issues, such as education and economic development, and draft legislation for the next session. This training will help us do that. For the General Assembly to be effective, we need to use the interim effectively."

### **HANDS-ON TRAINING**

State legislatures appear to be all over the map when you look at the differences in emphasis and approach that they take in legislative training, but certain key principles emerge.

- Legislators must be involved in the planning to make sure the training is relevant and essential.
- New legislators have to be able to put their hands on the training, such as mock committee or floor sessions or computer training, to get directly involved.
- Avoid overloading the program and make sure to give members time to network and to reflect on what they've been taught.
- Although the training may not give members instant expertise, it should expose them to the types of issues, challenges, complaints and dilemmas that they will soon face for real.

And last of all, training needs to give members a strong sense of the legislative institution and their role in serving that institution.

Bruce Feustel and Rich Jones work on training issues for NCSL.

---

## **Training California Style**

---

The CAPITOL Institute was created in 1998 to do more than just orient new members to the California Assembly. From their offices on the third floor of the Legislative Office Building, the five staff members of the institute, informally called Hertzberg University after the Assembly speaker who set it up, conduct training throughout the year for members and staff.

The combination of legislative knowledge and training expertise equips the institute staff to prepare training materials on a wide range of topics including: organizing Capitol and district offices, hiring and managing staff, ethics, legislative processes, chairing committees, and understanding the California budget process. Classes are held in and around the Capitol, and institute staff also travel around the state to train staff in the district offices.

Sessions use accelerated learning techniques in a variety of formats, such as lectures, PowerPoint presentations, small group discussions, videos and case studies. Experienced Assembly members teach a number of the sessions with help from the institute staff.

"Using Assembly members as faculty makes the training more believable to the new members," says Shannon Hood, an institute staffer. "It also reinforces the experienced members' understanding of the materials."

Legislators and staff receive binders with detailed information on each topic that become reference and management guides to the Assembly's policies.

In addition, the Institute conducts its version of spring training where it holds briefings in February and March on the policy issues before various Assembly committees. Committee chairs and vice chairs teach these bipartisan sessions, which are open to all members of the Assembly.

Although the institute is voluntary, most of the newly elected members have gone and give it ringing endorsements. The training is mandatory for all Assembly staff. "It was a very helpful program that got us off to a fabulous start in what has been a tough year in California," says Assemblywoman Jenny Oropeza.

---

## **Tips from the Experts**

---

Experts who lead legislative training exercises emphasize these tips.

- Plan well ahead.
- Get ownership by leadership.
- Don't overwhelm them.

- Focus on the essentials.
- Make it "hands on."
- Give them time to get to know each other.
- Be flexible and make necessary on-the-spot adjustments.
- Provide training in segments that allow time for reflection.
- Custom fit your computer training for wide ability range.
- Give them materials that allow them to continue learning.
- Get feedback and adjust future programs based on the feedback.

©2001, National Conference of State Legislatures. All rights reserved.

**Visitor counts for this page.**

---

© 2006 National Conference of State Legislatures, All Rights Reserved

**Denver Office:** Tel: 303-364-7700 | Fax: 303-364-7800 | 7700 East First Place | Denver, CO 80230 | [Map](#)

**Washington Office:** Tel: 202-624-5400 | Fax: 202-737-1069 | 444 North Capitol Street, N.W., Suite 515 | Washington, D.C. 20001