



**CALIFORNIA TOBACCO
ENDGAME CENTER FOR
ORGANIZING AND ENGAGEMENT**
A project of the American Heart Association®

Engaging Decision Makers Toolkit

The Keys to Building Relationships and
Engaging Local Decision Makers





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This toolkit is designed to help California Tobacco Prevention Program (CTPP)-funded organizations and agencies, local coalitions and their allies with two important elements for working with decision makers: building strong, strategic relationships and effectively engaging them to advance commercial tobacco prevention issues and your tobacco policy campaign goals.

Meeting with decision makers — whether in person, online, or at public forums—is a valuable opportunity to build trust, share your coalition’s priorities, and lay the groundwork for long-term policy change. This toolkit provides practical guides, templates, and resources to help you prepare, engage with confidence, and follow up effectively.

These tools can help you begin developing new relationships or strengthen existing ones with local decision makers and their staff. They are designed to support you in leading successful meetings and tracking your progress over time. You’ll also find links to additional tools and videos that further support your efforts to build meaningful, lasting relationships with decision makers.



For guidance on allowable vs. non-allowable activities such as lobbying vs. education activities, please consult with your project officer or visit CTPP’s website:

www.tcspartners.org/Campaigns/LocalPrograms/Trainings.cfm

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[Click Here for Links to Additional Decision Maker Engagement Tools](#)

Guides for Meeting with Decision Makers





Facilitator's Guide to Holding Successful Meetings



Leading a Meeting with Your Decision Maker

Every person has the fundamental right to meet with their decision makers and to have their voice heard on the issues that matter most. As a meeting facilitator, your role is vital in empowering others to speak up, share their stories, and advocate for change.

By organizing, educating, and amplifying voices, you help build a collective movement that ensures decision makers are not only listening, but acting in the best interest of the people they serve. Your leadership inspires others to believe in the power of civic engagement and the impact of collective action.

This guide will help you plan and set up effective meetings with decision makers to support tobacco prevention efforts in your community.

Prepare For Your Meeting (2-4 Weeks Before the Meeting)

Identify who should attend, gauge the decision maker's stance on tobacco issues, and review district-specific priorities, concerns, and local data to guide the discussion. Once you confirm who will be in the meeting, take time to define the goals, including what you hope to achieve in terms of tobacco prevention policy or support. This will help create the "ask," or "local action request," which is a request to your local decision maker to take action to support tobacco prevention, such as promoting cessation resources, attending a coalition meeting, or voting for a policy (for non-CTPP funded groups and individuals that can lobby).^{*} It is the meeting facilitator's role to help each unique speaker develop powerful talking points that have a lasting impact.

Review the "Hook, Line, and Sinker" Method

The Hook, Line, and Sinker method is a structured approach used in meetings with elected officials. Plan your meeting using this guide and assign meeting roles in advance, such as lead speaker to guide the conversation, support speakers, storytellers, policy experts, note taker, photographer, and someone to provide leave-behinds or handle other tasks, and schedule time to practice so everyone feels confident and prepared.

^{*}For more information about Lobbying vs. Education, visit CTPP's website: www.tcspartners.org/Campaigns/LocalPrograms/Trainings.cfm

Day of Meeting: Leading a Successful Visit

Meeting Logistics – Know Where to Go and When

To ensure a smooth meeting experience, designate a clear meeting spot for your group ahead of time—such as in front of the building, in the lobby, or on a specific floor—and share this location with all participants in advance. Plan to arrive at least 30 minutes early (or earlier) to allow time for check-in, security procedures, and any last-minute coordination. To stay connected throughout, consider creating a group text thread for easy communication before, during, and after the meeting.

Conducting the Meeting

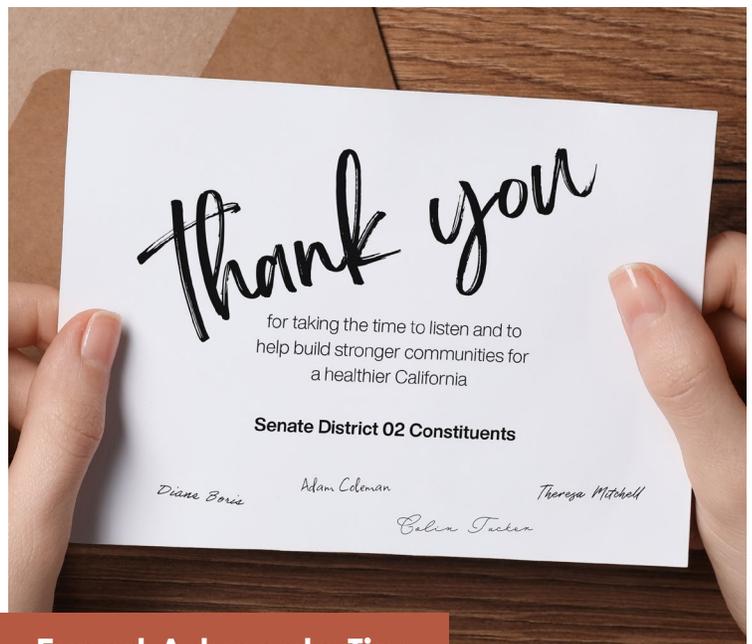
- **Engage Respectfully:** Be courteous, listen actively, and acknowledge the official’s perspective. Meetings may be brief or interrupted, so stay focused and concise and use the “Hook, Line, and Sinker” method.
- **Leave-Behind Materials:** Provide a concise leave-behind packet with relevant information, including contact details for follow-up.
- **Capture the Moment:** If appropriate, take a photo with the decision maker or their staff. Share it on social media and tag them to publicly thank them for their time.

Debriefing with Your Group

- After the meeting, take 10-15 minutes to debrief with your group. Discuss what went well and areas for improvement.

Follow-Up

- After the meeting, follow up with the decision maker to thank them for their time.
- Provide any additional information or materials requested during the meeting.
- Keep the engagement going and continue to build the relationship.



Expert Advocate Tip:

“A thank-you card from the group, signed by each participant, can make a lasting impression. I’ve found that presenting the card immediately after the photo amplifies the impact of the meeting and reinforces the information in a memorable way.”

Karen Compton, Tobacco Education Program Coordinator, Trinity County



Holding a Successful Meeting with Your Local Decision Makers: Hook, Line, and Sinker



This resource demonstrates how to effectively meet with a decision maker to educate and inform them about tobacco prevention issues. Local decision makers care deeply about their communities so when engaging with them, be sure to highlight personal stories, and the real impact that commercial tobacco has on families, neighborhoods, and the community at large. Be clear how tobacco affects the people the decision maker serves every day.

Below is an example of how to use the “Hook, Line, and Sinker” approach when meeting with a city councilmember or county supervisor. In this scenario, the meeting leader is the person in the group that helped arrange the meeting and prepare the group for the meeting.

Hook: Setting the Stage

The meeting leader introduces themselves, thanks the decision maker or staff for their time and briefly outlines the meeting’s discussion topic. If the group is small, everyone can introduce themselves.



“Thanks for meeting with us. I’m [Name] and we are constituents of yours working on tobacco prevention and public health in our community. We’d like to talk about tobacco issues affecting your constituents, especially around smokefree multi-unit housing. To clarify, when we mention tobacco, we’re referring to commercial tobacco, not traditional tobacco, which holds deep cultural and ceremonial significance in tribal communities. In contrast, commercial tobacco is manufactured with harmful chemicals and marketed to addict people for profit. We just want to make that distinction clear. But before we dive in, I’d like to give everyone a chance to introduce themselves.”

Line: Message Points

This is where you deliver information to the decision maker about how commercial tobacco, and the tobacco industry is impacting their district and the entire community. Summarize those impacts with local data and personal stories, emphasizing how California's tobacco prevention progress has been driven by local actions. Have someone share their personal story that ties directly to the issue being discussed, helping to bring it to life.

Below is an example of a model script that can be modified to fit your local situation, local policies and campaign.



“Councilmember, we’re here to talk about how secondhand smoke is a big concern for people who live in multi-unit housing. With apartments, smoke can drift between units through shared ventilation, cracks in walls, from outdoor patios and in other ways, making exposure difficult to avoid and putting neighbors at risk. A recent citywide poll found that more than 80% of multi-unit housing residents want protection from this harm. Smokefree housing helps address health disparities, especially for those who can’t afford to move. That’s why our coalition is focused on educating the public and the City Council about this problem and the benefits of creating smokefree housing—because everyone deserves clean air at home. In fact, lots of other cities have already acted by implementing smokefree housing policies in response to growing community demand. Your leadership could help ensure that all communities in your district benefit from the same protections.”

Sinker: Making the Ask

When making an ask of a local decision maker, be clear, specific, and strategic. Whether you’re requesting attendance at a coalition meeting, a public statement, or help connecting with other stakeholders, choose an ‘ask’ that aligns with their interests. Make it easy for them to say yes to your request, especially if you’re building a new relationship. Use the opportunity to position yourself as a resource and invite future collaboration.



“We’re asking for your support to build a healthier community by promoting smokefree multi-unit housing. We can provide materials to help raise awareness or share resources to help you learn what other cities are doing to address this issue. Would you be open to working with us to explore next steps? “

[Pause for response...]

Wrapping Up the Meeting

Thank the decision maker or staffer for their time, then give them any materials your group decided to bring to the meeting (limit the leave behinds to a few resources). Recap any follow-up actions and ask if they'd be willing to take a photo with the group.



“Thank you for meeting with us today. We appreciate your attention to these issues and look forward to following up on [specific follow-up]. Before we finish, would you be willing to take a photo with our group for social media?”



How to Give Public Comments at City Council and Board of Supervisors Meetings



Speaking up in a public comment period during local City Council or Board of Supervisors meetings is an impactful way to get your campaign's message out. These meetings provide your coalition with the opportunity to showcase their passion for the issue, share personal stories, and deliver the campaign's message to important decision makers in your city and county.

What Happens at City Council or Board of Supervisors meetings?

Your local City Council and Board of Supervisors meets regularly to govern the corresponding jurisdiction including enacting key public health policies about tobacco control. Policies passed by City Councils affect only the area within city limits. Policies passed by a County Board of Supervisors affect only the unincorporated County property, not the property that is within the boundary of a town or a city that has its own Council.

How To Give Public Comments

Members of the public can give comments, sometimes referred to as testimony, during local City Council and Board of Supervisors meetings on items that appear on that meeting's agenda, as well as items that are not on the agenda.

First, let's talk about items that are on the agenda. In most jurisdictions, the public comment period occurs after a presentation has been given on your issue by the City or County staff to the policymaking body, and right before the body has their public discussion and takes a vote.

Now, let's talk about items that are not on the agenda. Most jurisdictions offer a general public comment period at the beginning or end of the meeting for any item that is not on the agenda. General public comment is a great way for the community to raise awareness about a desired tobacco prevention policy that they have not been able to get on the policymaking body's agenda yet.



Public comments used to be only delivered in person by attending the meeting. Now, some jurisdictions are only allowing public comment virtually over Zoom or by phone, and some offer both in person and virtual options. You can find out the specific situation in your jurisdiction at their website where they list instructions for delivering public comment. When a public comment is going to be delivered in person, many jurisdictions require you to fill out a speaker card and turn it in to the clerk in advance of the item.

Public comment speakers are usually allotted up to three minutes to speak. The time varies for each city or county and can be influenced by how many speakers have signed up for a particular agenda item. Speakers will deliver the following information in order:

- Their name and the organization they represent, if that's their purpose;
- Where they live if they are a constituent of the jurisdiction;
- Their view on the issue;
- Why the issue is important to them. **This is a good place to tell a personal story or cite a relevant fact or statistic;** and
- Deliver an ASK of the jurisdiction.

Reminder!

Projects and programs funded by the California Tobacco Prevention Program from Proposition 99 and Proposition 56 funds cannot lobby. They cannot promote "support" or "opposition" positions on a specific piece of legislation, ordinance, or ballot measure. They can, however, educate the governing body on relevant local statistics, share a personal story, or inform them about the important work that they are doing in the community in relation to the policy under discussion.

Source: *Rules of the Road*, California Tobacco Control Program

Do's and Don'ts

- Do demonstrate your knowledge, passion and credibility about the issue.
- Do practice your prepared remarks out loud and time yourself. Have a one, two and three minute version ready.
- Don't go over the allotted time. If the time ends, quickly finish your thought and close by saying "thank you."
- Don't underestimate the value of a personal experience. Personal stories make you memorable and can sway an undecided decision maker.

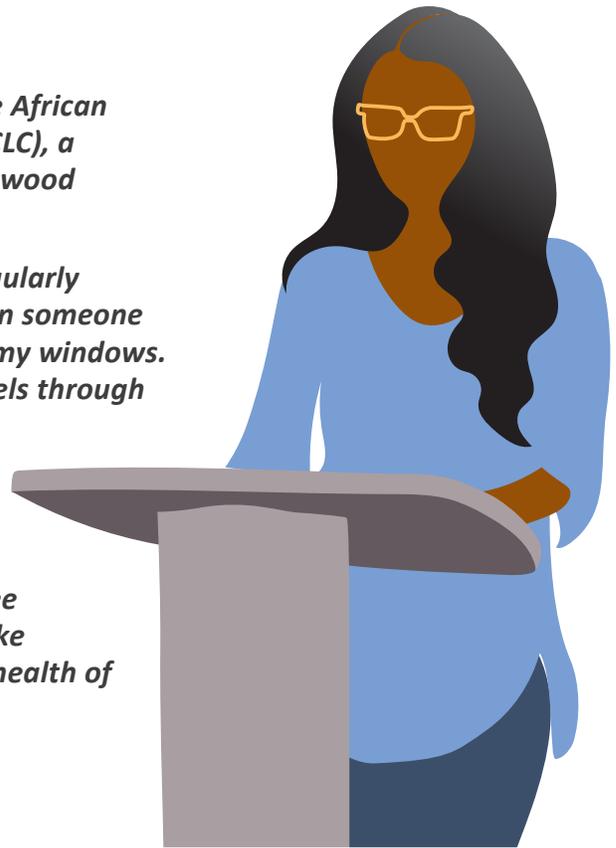
Sample Public Comment

Hello, my name is Leanne. I am a volunteer with the African American Tobacco Control Leadership Council (AATCLC), a college student at UCLA, and a resident of the Westwood Neighborhood Apartments.

I am here today because my neighbors and I are regularly exposed to secondhand smoke in our building. When someone smokes on their balcony, the smoke seeps through my windows. When others smoke inside their apartments, it travels through vents and doors. We cannot escape this exposure, and it puts me, and everyone living there, at risk for lung cancer, stroke, asthma attacks, and other serious tobacco-related diseases.

Los Angeles must lead the way in creating smokefree multi-unit housing for all residents. I urge you to take action and address this critical issue to protect the health of our community.

Thank you for your time and consideration.



Also Think About

- Watch old City Council or Board of Supervisors meetings ahead of time to prepare.
- If the jurisdiction has elected officials that represent only a portion of the geography, rather than at-large members, find out which elected official represents your area and mention that in your testimony, as in “My family and I live in Councilmember Smith’s District.”
- If you are not comfortable speaking in public, an alternative to the oral public comment period may be to submit written comments in advance of the hearing. A written public comment should not be any longer, nor more detailed, than a public comment delivered verbally. Check your local jurisdictions’ rules for meetings to see if this option is allowed.



For more sample public comments, worksheets, and training materials, check out the *Public Comment Digital Toolkit* on our website: <https://organizingtoendtobacco.org/public-comment/>

Building and Strengthening Relationships





How to Recruit a Policy Champion:

Strategies for Identifying Supportive Officials



What is a Policy Champion?

A **policy champion** is an influential individual who actively supports, advocates for, and drives policy change. They bring credibility, resources, and a strong voice to amplify your cause and help to navigate political and social landscapes.

Steps to Recruit a Policy Champion

Identify a Potential Champion

Identify a decision maker who can influence other members of the governing body, has a strong presence in the community, and is a committed supporter of tobacco prevention policies.

Build a Relationship

Schedule a meeting to establish trust by sharing stories to connect with the decision maker to build credibility. Understand their values and priorities. Determine if their priorities align with the coalition's interests and goals.

Present a Clear Ask

Be specific about how they can contribute as a Champion (e.g., willingness to speak at events and leveraging their relationships and networks). Emphasize how their involvement can create a meaningful impact on the community.

What to Categorize and Consider

Category	Considerations
Influence	What networks, platforms, or audiences do they have access to?
Alignment	Do their values and priorities align with your policy goals?
Expertise	Do they bring unique knowledge or skills to support the policy?
Reputation	Are they respected and trusted in the community or relevant sector?
Capacity	Do they have the time and willingness to help lead the effort?
Potential Risks	Are there any controversies or conflicts of interest that could impact your campaign's credibility?

Key Tips



Do Your Homework:

Research their background, values, and previous leadership efforts.



Focus on Mutual Benefits:

Highlight how the policy aligns with their priorities or creates a positive legacy.



Provide Support:

Offer materials, training, and guidance to empower them in their role.



Keep Them Informed and Engaged:

Regularly communicate updates on the progress of the campaign and any relevant developments. Allow opportunities for feedback on strategies.



Acknowledge and Appreciate Their Efforts:

Publicly and privately recognize their contributions in leading the effort. Highlighting their involvement can also help to build momentum for the policy.

By carefully selecting and supporting the right policy champions, you can significantly increase your campaign's visibility and impact.



Building Meaningful Relationships with Decision Makers



MAIN MESSAGE:

- Get to know the decision maker before you reach out
- Regularly communicate with decision makers
- Invite decision makers to events and activities

Why It's Important to Build Relationships with Decision Makers

Advancing tobacco policies relies upon the relationships built with decision makers and their staff. Getting to know city council members, county supervisors, and state legislators and their staff is a critical function of advocates striving to end the tobacco epidemic. These decision makers are opinion leaders in the community and are influential about issues that get addressed in a community or not. From the standpoint of advancing local tobacco policy issues through campaigns, decision-makers literally hold the power to move forward or not. That's why it's critical for the coalition to build strong relationships with decision makers – even those who are not your usual allies in tobacco prevention.

Not everyone has the experience engaging with elected officials who seem to be very “important” and “powerful” people. They're regular people and following the simple steps and tips here can help demystify the decision maker and create opportunities to build strong relationships with them.



1. Get to Know Your Decision Maker

Take the time to research and learn about the decision makers in your community. Go to their website, read news articles about them, learn about their interests and what motivates them. Take note of any public statements about tobacco and other public health issues. Attend their events, even if they are not tobacco or public health related.



2. Schedule an Information & Education Meeting

An important step in building relationship with decision makers is to meet with them. If you don't already know them, it's an opportunity to introduce yourself and other coalition members and to educate, inform and update them on your activities.

Check out additional resources in the Decision Maker Toolkit to help you prepare and conduct the meeting.



3. Regularly Communicate

Once you've made contact and held a meeting, it's important to maintain regular communication. With the demands on their time, decision makers are more likely to provide time to those where rapport has been built. Aim to connect with them once a month to update them about coalition activities and perhaps more frequently if in the middle of a local tobacco policy campaign. Here are a few ideas for creating communication opportunities:

- **Provide updates about the coalition's activities and current campaigns.**
- **Send interesting news articles, research or reports about tobacco.**
- **Provide local data about commercial tobacco, vaping, and other nicotine product use.**
- **Provide survey data that shows how a specific issue or campaign is popular with the public.**
- **Inform them about the tobacco policy activities of neighboring jurisdictions.**
- **Request another meeting to provide key updates (all the things above).**

Don't just reach out when you want something from the decision maker.



4. Engage: It's a Two-Way Street

Inviting decision makers to your events and activities is an effective way to build and grow a relationship. The more engaged they are, the more likely they will support and provide tangible help. Here are some suggestions:

- **Invite them to a coalition meeting.**
- **Send them a flyer and invite them to a tobacco-related community event or activity.**
- **If appropriate, invite them to a campaign event or activity.**

Take the initiative to get engaged with the decision makers' activities. Try these:

- **Sign up for their newsletter.**
- **Follow them on social media.**
- **Attend their community events, as appropriate.**

KEY TOOLS:

- **Tips for Effective Meetings with Legislators**
- **How to Have an Effective Meeting with a Legislator (video)**
- **Decision Maker Matrix**
- **Circles of influence**

*Tools can be found at organizingtoendtobacco.org



5. Become a Resource

By establishing yourself as helpful, knowledgeable, and reliable, they will be more receptive to listening to your concerns and perhaps becoming a supporter of the work of the local coalition, issue or campaign. For example, if you learned that the decision maker is interested in children's health, help connect them with resources on flavored tobacco products and what the coalition or campaign is doing to address the issue. As mentioned above, providing relevant news stories, research and reports about tobacco will help cement your role as a reliable resource.



6. Thank Them For Their Work

With the ease of social media platforms, decision makers often see a lot of negative reaction to their work, but seldom see gratitude or thanks on behalf of the community and their constituents. Take the time to send an email, make a phone call, or tag them in an appreciative post when the decision maker votes favorably on a tobacco policy issue. Congratulate them on any awards or honors they have received.



Making Connections with Newly Elected Decision Makers

Early Engagement: Educating New City Council Members and County Supervisors about Commercial Tobacco's Impact on Your Community



I kept and valued the relationships with organizations and individuals who reached out to me when I was first elected. They helped me find ways to partner in improving our community.”

Mario Flores

City Councilmember, San Bernardino



Why Relationships Matter

Trusting relationships are built, not given. Decision makers are more likely to support policies when they trust and understand the people behind them. That's why building relationships with newly elected officials is essential to shaping a healthier community.

Why Getting in Early with New Decision Makers is Important

Newly elected decision makers are often eager to make a difference and learn more about their constituents. By engaging early, you can become a trusted resource, helping them understand the impact of commercial tobacco on the community and how they can be part of the solution. Track local elections and reach out to winners as soon as they are announced, even before they're sworn in. Send a warm, congratulatory message expressing your excitement to work together. This sets the tone for a positive first impression.

Key Benefits of Early Engagement

- ✓ Builds champions for tobacco prevention
- ✓ Opens doors for collaboration on community events and initiatives related to tobacco prevention
- ✓ Keep decision makers informed and involved
- ✓ Become a trusted resource for tobacco prevention policies

How to Build Relationships with Newly Elected Decision Makers

1 Do Your Homework

- Learn about the elected official's background, priorities, and campaign platform
- Review election results, endorsements, and major donors
- Identify shared values or interests (e.g., youth, public safety, health disparities)

See **The Decision Maker Matrix (DMM) for assistance in analyzing the policy position of the decision makers in the jurisdiction.*

2 Make the First Move

- Send a congratulatory message and express interest in working together
- Request an introductory meeting (a “meet and greet”) with the decision maker and key members of your coalition, ideally those from the decision maker's district
- Prepare a welcome packet with key information and resources to introduce them to your coalition and commercial tobacco's impact in your community
- Provide a one-pager on key tobacco prevention activities in the city/county

- Make a reasonable “ask” during your first meeting—such as attending a coalition meeting or scheduling a follow-up conversation

See resources **“Meeting Facilitator Guide” and **“Hook, Line, and Sinker”** for demonstration of a district meeting.*

3 Keep Them Engaged

- Invite them to community events or youth-led initiatives
- Keep communication consistent, but respectful of their time
- Share relevant updates and community feedback
- Add them to your newsletter list
- Engage with them on social media—follow, tag, and share posts related to tobacco prevention

Building meaningful relationships with a newly elected decision maker takes time, intention, and persistence. Focus on shared goals that benefit the broader community, rather than solely advancing your agenda. Stay committed to the process, knowing that trust and collaboration grow over time.



Decision Maker Relationship Tracker

As you engage with decision makers, it's important to document and track those interactions to ensure strategic follow-up and team coordination. Whether you're meeting with City Council Members or County Supervisors, there's a lot to keep track of such as their level of support for tobacco prevention, requests for additional information, or interest in participating in upcoming events.

Decision Maker's Name	Jurisdiction and Seat	Term of Service	District	Phone and Email	Staff Contacts
ex: Jane Doe	Clovis, Mayor Pro Tem	2025-2027	3	(555) 555-5555 Jdoe@email	John Doe (Chief of Staff)

The Decision Maker Relationship Tracker is a valuable tool to help you:

- Monitor the status of each relationship
- Record key details from your engagements
- Identify opportunities for follow-up
- Maintain clear communication across your team

Meeting Dates	Background Notes	Meeting Notes	Follow-Up Actions	Event Invitations
16-Jul-25	Former Parks and Recreation Commissioner Physician and values healthy communities, grew up in District 2. Volunteers with Boys and Girls Club, which is a coalition member.	They were very interested in hearing our data on Retail Licenses. They are interested in youth oriented information.	Invite them to next coalition meeting. Also mentioned they want to add a message in next newsletter going out. Send them data on TRL.	Send invite to upcoming press conference in the summer

By using this tracker, you'll stay organized and informed, making it easier to strengthen relationships and advance tobacco prevention efforts effectively. Be sure to also use it in coordination with the Decision Maker Matrix in order to get a more detailed background and share this document with your team to be updated as needed.



[Download the Excel Template Here](#)

Links to Additional Decision Maker Engagement Tools

- Understanding the Local Legislative Process
- Digital Public Comment Toolkit
- Decision Maker Matrix
- Circles of Influence
- Engaging the Public, Decision Makers, and the Press (Video)
- How to Have an Effective Legislative Meeting (Video)



www.organizingtoendtobacco.org/resources/