



Decision-maker Engagement Toolkit

This toolkit is intended solely for informational purposes to support project implementers in sharing program outcomes and fostering relationships with public officials. It is not intended to support or encourage advocacy or lobbying activities. The California Air Resources Board and California Energy Commission do not endorse any specific outreach strategies, organizations, or materials contained herein, and assumes no responsibility or liability for their use or interpretation.

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Introduction

Engaging with decision-makers can help support the visibility and success of any public initiative. Decision-makers, like legislators, mayors, or county supervisors, have the power to influence policies, secure funding, and drive legislative action that can bring more projects to life. The “Target Audience” section of this document will outline additional decision-makers to consider for engagement. By building strong relationships with them, you can foster support for your program, educate them about its benefits, and ultimately, show the impact of implementation.

Why Engage with Decision-makers?

Legislators, elected officials, and other local leaders play a key role in shaping public policy and allocating resources for community projects. For clean mobility initiatives, their understanding and awareness can contribute to continued support, informed decision-making, and broader visibility for the program and builds momentum for broader support within the community. When they understand the value of these programs—such as their ability to reduce traffic, improve air quality, and increase mobility—they are more likely to champion them and take action on behalf of their constituents.



What Do You Want Decision-makers to Get Out of Engagement?

The goal of engaging with your legislators, elected officials, and other local leaders is twofold: you want them to take specific actions and, importantly, to gain a deeper understanding of your program. Actions may include supporting the program in budget negotiations, advocating for favorable policies, or attending community events to show their support. Ultimately, you want them to see the program as a solution that aligns with their goals, whether that's environmental sustainability, improving public transportation, or promoting economic growth through cleaner mobility options. The more they understand how the program will positively impact their district or region and how it works harmoniously with other programs and projects to deliver benefits across the state, the more likely they are to act in its favor.

Examples of Events or Moments for Engagement

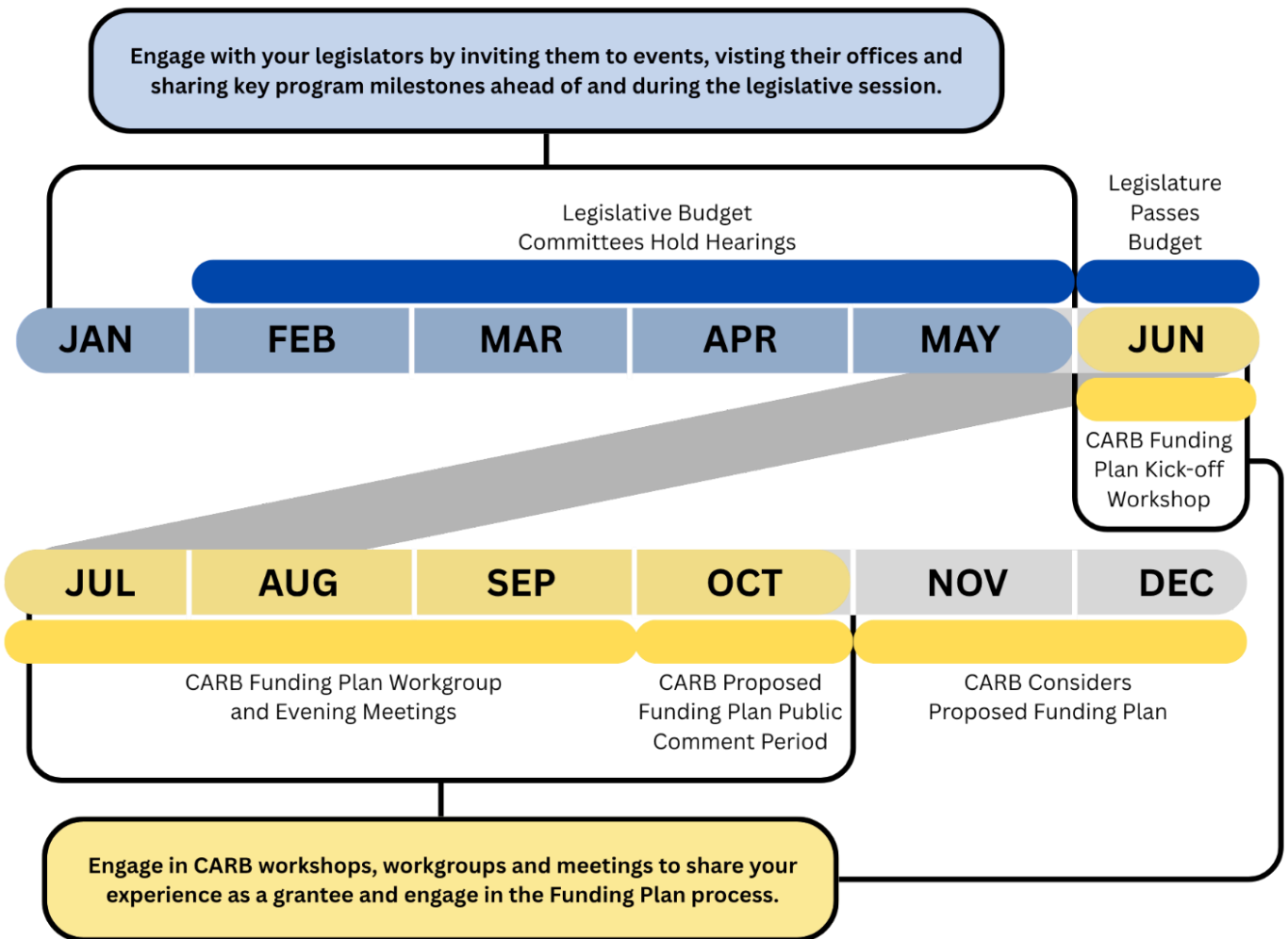
There are numerous ways to engage with decision-makers throughout the lifecycle of your project. Here are some key moments for outreach:

1. **Press Events:** Invite decision-makers to speak at or attend ribbon cuttings, milestone celebrations, or expansion announcements that involve a public event geared toward media and public engagement. This allows them to experience firsthand the impact and potential of the equitable mobility program.
2. **Outreach Events:** Host a block party, ride-and-drive opportunity, or participate in other local events, like fairs and festivals, where a decision-maker can speak or attend as a special guest.
3. **Public Forums or Decision-maker Meetings:** Hosting public forums where community members, local leaders, and policymakers come together to discuss the program can be a powerful way to engage officials and demonstrate public support.
4. **Thank-You Events:** After securing funding or support, hosting a thank-you event for decision-makers and other key collaborators is a great way to acknowledge their contributions and build continued support for future initiatives.
5. **Policy Briefings:** Organize a meeting where you present data, impact studies, and testimonials that highlight the program's potential benefits. This is an opportunity to engage in a focused discussion on policy and funding needs.

By engaging with decision-makers at these strategic moments, you not only build meaningful relationships but also create champions who will help drive the success of your shared mobility program.

When to Invite Decision-Makers to Events

Below is an outline of key moments throughout the year to help you determine when is the best time to engage with audiences. The bodies that make important decisions around funding for equitable clean transportation projects are the state legislature, the California Air Resources Board (CARB) and the California Energy Commission.





Sample Engagement Timeline

The following timeline backmaps from the date of the event and includes suggested deadlines for key tasks to ensure smooth planning and successful engagements. Please consider your event type and venue and adjust the timeline accordingly to meet the demand of your venue, speaker(s) availability, and any other logistical considerations that might require a longer lead time.

Please ensure you follow any specific program or grant guidelines when planning events. This is a supplemental resource for planning outreach.

6-8 Weeks Before the Event: Planning Phase

Define Event Goals and Objectives	By [Date - 8 weeks before event]
<i>Finalize the purpose of the event, key messages, and any specific outcomes you want to achieve (e.g., expressing gratitude, showcasing program results, networking).</i>	
Confirm Event Logistics	By [Date - 8 weeks before event]
<i>Secure the event venue and technology needs (e.g., microphones, projector, etc.), finalize date and time, and prepare the event agenda.</i>	
Create Invitations and Messaging	By [Date - 7 weeks before event]
<i>Finalize your invitation email template, letter, and follow-up messaging. Customize content for the decision-makers and ensure all event details are clearly included.</i>	
Prepare Event Materials	By [Date - 7 weeks before event]
<i>Collect success stories, impact data, press releases, and any promotional material to highlight project successes.</i>	

4-6 Weeks Before the Event: Invitations Sent

Send Initial Invitations	By [Date - 6 weeks before event]
<i>Send the formal invitation email and letter to the decision-makers. Be sure to tailor the message and acknowledge the specific contribution each representative made.</i>	
Create RSVP Tracking System	By [Date - 6 weeks before event]
<i>Set up a simple system to track RSVPs (e.g., Google Sheets, Excel, or an event management platform like Eventbrite).</i>	
Follow-Up on Logistics	By [Date - 5 weeks before event]



Confirm venue details, parking, catering (if any), and any technology needs for the event.

3-4 Weeks Before the Event: Follow-up Phase

Follow-Up Invitations	By [Date - 4 weeks before event]
<i>Send a polite reminder email to the decision-makers who have not responded. This email should reiterate the importance of their attendance and the impact of their support.</i>	
Confirm Event Program and Speakers	By [Date - 4 weeks before event]
<i>Finalize the event agenda and confirm speakers, including any decision-makers or program partners who may speak or present.</i>	

2-3 Weeks Before the Event: Finalizing Details

Confirm RSVP and Send Reminders	By [Date - 3 weeks before event]
<i>Begin reaching out to decision-makers who have RSVP'd and confirm their attendance. For those who haven't responded, send a second reminder or make a phone call.</i>	
Order Materials and Promotional Items	By [Date - 3 weeks before event]
<i>Order any items you may need for the event, such as programs, thank-you cards, plaques, or other recognition tokens for the decision-makers.</i>	
Send Final Event Details to Attendees	By [Date - 2 weeks before event]
<i>Send a final reminder to all confirmed attendees, including the event agenda, parking instructions, and any other essential details.</i>	

1 Week Before the Event: Preparation Phase

Prepare Event Setup and Materials	By [Date - 1 week before event]
<i>Ensure that all event materials (name tags, sign-in sheets, programs, etc.) are prepared and ready for the day. Confirm catering, audiovisual equipment, and seating arrangements.</i>	
Reconfirm with the Decision-maker	By [Date - 1 week before event]
<i>Send a personal note or email to the decision-maker who will attend to reconfirm their participation and ensure they have all the necessary details.</i>	
Review Program and Rehearse	By [Date - 1 week before event]

Conduct a run-through of the event, review the program flow, and rehearse any speeches or presentations, especially if decision-makers are speaking.

Day Before the Event: Final Check

Final Check of Event Logistics	By [Date - 1 day before event]
<i>Double-check all event logistics one last time—location, catering, seating arrangements, signage, etc.</i>	
Send a Reminder	By [Date - 1 day before event]
<i>Send one last reminder to all attendees, including decision-makers, with final event details.</i>	

Post-Event: Follow-Up

1-2 Days After the Event: Gratitude Phase

Send Thank-You Notes	By [Date - 1 day after event]
<i>Send a personalized thank-you note to each decision-maker who attended, expressing gratitude for their support and participation. Highlight the event's success and any key takeaways.</i>	

1 Week After the Event: Evaluation Phase

Evaluate Event Impact	By [Date - 1 week after event]
<i>Take time to evaluate the event's success, including feedback from attendees, media coverage, and your ability to meet your goals (e.g., strengthening relationships with decision-makers).</i>	
Share Impact Report or Event Recap	By [Date - 1 week after event]
<i>Share a summary or impact report about the event and the program with decision-makers. This reinforces their role in the program's success and keeps the relationship warm.</i>	

Timeline Summary

- **8 Weeks Before:** Confirm event details and draft messaging
 - **6 Weeks Before:** Send initial invitations
 - **4 Weeks Before:** Follow-up with any non-RSVPs
 - **2 Weeks Before:** Finalize event details and send reminder
 - **1 Week Before:** Confirm attendance and review program
 - **1 Day Before:** Final checks and send final reminder
 - **Post-Event:** Send thank-you notes and share event impact
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How to Determine Your Target Audiences

When it comes to funding and launching state-funded sustainable shared mobility projects, different key collaborators play distinct roles in decision-making. These roles are shaped by their positions within government and the specific powers and responsibilities they hold. Below is a breakdown of the decision-making responsibilities for each of the target audiences listed. If your community is unincorporated or lacks a typical local governance structure, please contact your program administrator for help identifying your target audience.

Mayors

Role in Decision-Making:

- **Program Advocate:** As the elected leader of the city, the mayor is a key advocate for any mobility initiatives that impact the city's residents. They can be inspired to drive urban mobility and sustainability within a city.
- **Local Funding Requests:** The mayor has influence over the local budget, and while they might not directly allocate state funds, they can work with city council members to prioritize funds for mobility projects.
- **Partnerships and Collaborator Engagement:** The mayor can facilitate partnerships with local organizations, transit agencies, and private sector partners, ensuring smooth implementation of the projects.
- **Policy Leadership:** The mayor may champion policies that make the project more feasible, such as bike lane infrastructure, parking regulations, and local environmental policies.

Decision-Making Influence:

- **Direct Impact:** The mayor has significant influence over the local government's willingness to implement the program and can be pivotal in securing local and regional support.



- **Indirect Impact:** The mayor’s leadership on urban mobility issues can help in connecting with other decision-makers.
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City Council and Other Local Government Entities

Role in Decision-Making:

- **Budget Approval:** The city council is responsible for approving the city’s budget, which includes allocations for local mobility projects. Council members have the authority to approve or deny the use of city funds or request matching state funds.
- **Policy Development:** City council members develop, debate, and vote on policies related to transportation, infrastructure, and sustainability. They can pass ordinances that support the project, such as regulating bike parking, promoting environmental benefits, and integrating sustainable mobility programs with other local transit systems.
- **Public Representation:** Council members represent the interests of their districts and may advocate for the project if it benefits their constituents, especially in terms of public mobility, sustainability, and reducing traffic congestion.

Decision-Making Influence:

- **Direct Impact:** City council members hold substantial power in determining whether a shared mobility program receives local funding and support.
 - **Indirect Impact:** They can influence state-level funding by supporting resolutions or education efforts to support state or federal grants.
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County Board of Supervisors

Role in Decision-Making:

- **Budget Approval:** The county board approves the county’s budget, including allocations for transportation and infrastructure projects that may incorporate clean mobility or sustainability initiatives. Supervisors can authorize or deny county funding and request matching funds from state or federal programs.
- **Policy Development:** Supervisors draft, debate, and adopt county ordinances and resolutions affecting transportation, environmental policy, and land use. They can establish policies that promote shared mobility, reduce emissions, and integrate sustainable transportation with regional transit systems.
- **Public Representation:** Each supervisor represents a district within the county and advocates for projects that meet their constituents’ needs, such as improving mobility,



reducing congestion, and enhancing public health through cleaner transportation options.

Decision-Making Influence:

- **Direct Impact:** The board’s approval is often required for county participation in or funding of transportation initiatives, including zero-emission and shared mobility projects.
 - **Indirect Impact:** Supervisors can influence regional and state-level funding priorities by endorsing projects, passing supportive resolutions, or advocating with state and federal agencies for grant awards.
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State Assembly Members and Senators

Role in Decision-Making:

- **Legislative Support:** State assembly members and senators are responsible for introducing and voting on state-level legislation that can fund and regulate shared mobility projects. They can sponsor bills that allocate funding for sustainable mobility programs or pass laws that promote sustainable transportation.
- **State Budget Decisions:** These legislators play a critical role in approving the state budget, including transportation and environmental funding. They may push for or block funding for the program, depending on their stance on climate change, transportation equity, or urban development.
- **Education on Funding:** Assembly members and senators advocate for their districts and regions, pushing for the allocation of state or federal funds to support equitable mobility projects.

Decision-Making Influence:

- **Direct Impact:** Through their vote in the legislature, they can secure or block funding, approve necessary policy changes, and provide oversight for projects.
 - **Indirect Impact:** By raising awareness of the program’s benefits, they can rally support among their colleagues and local community members to increase the likelihood of funding.
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Congressional Representatives and Senators

Role in Decision-Making:

- **Federal Funding:** Congressional representatives and senators can secure federal funding for state and local projects through federal transportation, infrastructure, and

climate action funding bills. For a state-funded sustainable clean mobility program, they might advocate for federal grants or incentives that could complement state or city funding.

- **Legislative Advocacy:** They can push for national-level policies or reforms that support shared mobility and clean transportation, such as federal tax credits for sustainable transportation infrastructure or funding allocations for clean energy transportation projects.
- **Oversight and Accountability:** They often hold hearings or investigations into transportation and infrastructure projects, providing a platform for cities and states to showcase their shared mobility projects and advocate for continued or increased funding.

Decision-Making Influence:

- **Direct Impact:** Senators and congressional representatives can directly influence the allocation of federal funds for state-level programs and play a major role in influencing large-scale funding.
 - **Indirect Impact:** They can also help shape public policy discussions about the need for sustainable urban mobility solutions, which can in turn influence state and local decisions.
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California Air Resources Board

Role in Decision-Making:

- **Program Funding and Allocation:** The Legislature allocates Clean Transportation Incentive funds to CARB for programs, which typically includes clean mobility projects. CARB administers these funds and determines distribution across projects, ensuring alignment with state climate and air quality goals.
- **Funding Plan Development:** CARB develops its annual *Clean Transportation Incentives Funding Plan* to outline how funds will be spent. This plan is created with input from public meetings, ensuring community priorities and equity goals are incorporated.
- **Policy and Program Design:** CARB implements regulations and program guidelines that drive investment in zero-emission vehicles (ZEVs), clean transit, and sustainable mobility, including setting fleet requirements and market transition timelines.
- **Equity Prioritization:** CARB guidelines emphasize investments in disadvantaged and low-income communities to maximize air quality and mobility benefits where they are most needed.
- **Public Engagement and Transparency:** CARB holds public workshops and meetings (see: [LCTI and AQIP Meetings and Workshops](#)) where interested parties can learn about past decisions, track program performance, and contribute to shaping future program design and funding pathways.



- **Interagency Collaboration:** CARB coordinates with agencies like the [California State Transportation Agency \(CalSTA\)](#), [California Energy Commission](#) (CEC), and local air districts to align funding strategies and implementation.

Decision-Making Influence:

- **Direct Impact:** CARB controls the design, scope, and allocation of state clean transportation funds, influencing which technologies, regions, and communities receive investment.
 - **Indirect Impact:** CARB’s funding plans and program results inform legislative priorities and the Governor’s budget proposals. Their policy leadership also shapes market trends and local government strategies for sustainable mobility.
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California Energy Commission (CEC)

Role in Decision-Making:

- **Oversight:** The CEC is the lead state agency on ZEV infrastructure planning and deployment. This includes efforts to expand charging and hydrogen fueling, vehicle-grid integration, and planning for resilient transportation systems powered by renewable energy. The CEC also funds research, development, and demonstration of ZEV technologies, ZEV-related manufacturing, and workforce development.
- **Program Investment Planning:** The CEC develops an annual Clean Transportation Program Investment Plan Update to propose funding allocations primarily to support ZEV infrastructure, ensuring alignment with state climate and air quality goals. Once allocations are approved in the Investment Plan, the CEC administers these funds through various projects.
- **Assessments:** The CEC conducts assessments on the [electric vehicle charging infrastructure needed](#) to meet the state’s goals and program benefit assessments, such as the [Electric Vehicle Infrastructure Deployment Assessment](#), to inform future funding decisions.
- **Policy and Regulations:** The CEC has authority over setting EV charger reliability regulations and tire efficiency standards. These efforts support the state’s goal of transitioning to clean mobility technology and reducing emissions.
- **Public Engagement:** The CEC discusses proposed allocations with the Clean Transportation Program Advisory Committee and Disadvantaged Communities Advisory Group at public meetings, accepting both verbal comments and written docket comments. After incorporating feedback, the CEC presents each year’s Investment Plan Update for approval by commissioners at a public business meeting. CEC staff also hold public workshops to receive feedback on specific grant funding concepts, analyses, and regulations.
- **Community Benefits:** Legislation requires that at least 50 percent of Clean Transportation Program funding directly benefit and serve residents of disadvantaged communities and low-income Californians. The CEC has released numerous projects with a focus on equitable investments.

Decision-Making Influence:



- **Direct Impact:** The CEC controls the design, scope, and allocation of state clean transportation funds appropriated by the Legislature. The CEC sets the direction for California’s multi-agency ZEV infrastructure deployment.
- **Indirect Impact:** The CEC’s Clean Transportation Program and assessments inform legislative priorities and the Governor’s budget proposals. Investments help shape market trends and strategies for sustainable mobility.

California Air Districts

Role in Decision-Making:

- **Oversight:** California’s 35 local air districts are responsible for regional air quality planning, monitoring, and stationary source and facility permitting. The districts administer air quality improvement grant programs and are CARB’s primary partners in efforts to clean up California’s air.¹
- **Grant Funding:** Many air districts administer grants or funds for environmental improvement projects, including transportation initiatives that reduce air pollution. They may offer funding for other clean mobility options as part of their environmental and public health initiatives.
- **Collaboration with Local Governments:** Air districts often work with local governments and state agencies to plan and implement transportation programs that reduce carbon emissions and promote sustainability.
- **Assembly Bill 617 Funds:** Assembly Bill 617 requires the California Air Resources Board and all local air districts to protect communities most impacted by air pollution. This bill has resulted in grant programs for community projects to alleviate air pollution.

Decision-Making Influence:

- **Direct Impact:** Air districts can approve or disburse funding for programs as part of air quality improvement initiatives. They also influence alignment with local and regional air quality standards.
- **Indirect Impact:** By offering environmental incentives and supporting green mobility solutions, they can provide the necessary backing for cities and states to invest in shared mobility options.

Tribal Government Leaders

Role in Decision-Making:

- **Tribal Leadership:** Most federally recognized tribal governments follow a three-branch federal model—legislative, executive, and judicial. The chief executive, often elected

¹ [California Air Districts](#)

along with the tribal council, may be titled chairperson, chief, governor, or similar, and leads both the executive branch and legislative body. Tribal leaders oversee decisions on transportation, land use, and community development. Some tribes also appoint project-specific officials, such as Environmental Protection Directors or Clean Mobility Coordinators.

- **Project Coordination and Approval:** For projects on or affecting tribal lands, early and consistent engagement with tribal leaders is essential. Tribal approval or formal support initiatives may be required, particularly for state-funded initiatives within tribal jurisdiction.
- **Cultural and Environmental Stewardship:** Tribal governments place strong emphasis on environmental protection and cultural preservation. Tribal leaders are key partners in advancing sustainable transportation solutions that align with indigenous values and priorities. [Traditional Ecological Knowledge](#) of tribes is essential for understanding how programs and projects will interact with the natural world they exist within.
- **Government-to-Government Collaboration:** Tribal leaders regularly work with federal, state, and local agencies to coordinate funding, technical assistance, and policy alignment in support of transportation equity and mobility programs.

Decision-Making Influence:

- **Direct Impact:** Tribal leaders hold decision-making authority over all matters within their jurisdiction, including the approval and implementation of transportation projects on tribal lands.
- **Indirect Impact:** Tribal support can shape regional planning efforts and enhance funding applications by building political and community support for sustainable mobility initiatives.

Summary of Decision-Maker Responsibilities

Each of these interested parties play an essential and sometimes overlapping role in securing funding, crafting policies, and ensuring that a project aligns with broader goals, from local transportation needs to state-level environmental objectives. Effective collaboration among these actors is crucial to the success of such state-funded shared mobility projects.

Interested Parties	Role and Influence
Mayor	Advocacy for local support, works with city council to approve budget and policies, fosters partnerships, ensures vision alignment.
City Council	Approves local funding, passes policies that support or hinder shared mobility, represents public interest in local districts.
County Board of Supervisors	Approves budgets, sets policies, and advocates for sustainability projects and initiatives, can directly fund programs and influence state and federal funding decisions.



State Assembly Members and Senators	Passes state legislation, influences state transportation and environmental budgets, advocates for local funding.
Congressional Representatives and Senators	Secures federal funding, shapes national policy, advocates for clean transportation at the federal level.
California Energy Commission	Leads state planning and funding for ZEV infrastructure, shaping policies and investments to meet climate goals while prioritizing benefits for disadvantaged communities.
California Air Resources Board	Allocates state Clean Transportation Incentive funds, develops annual funding plans with public input, and directs investments toward clean transportation projects.
California Air Districts	Provides regulatory oversight, disburses funding for environmental programs, ensures program aligns with air quality goals.
Tribal Government Leaders	Holds direct authority over projects on tribal lands and exerts significant regional influence through intergovernmental collaboration and advocacy.

How to Research and Track Target Audience Contact Information

Mayor Contact Information

- **City Website:** Most city websites have a "Contact the Mayor" or "City Government" section with the mayor's contact details.
- **City Hall:** The mayor's office is usually housed at city hall, where you can find their office's direct contact information (phone and email).
- **Publicly Available Documents:** Contact information can also be found in city council meeting minutes or other public documents related to city governance.
- **Social Media:** Many mayors are active on social media platforms (Twitter, Facebook, LinkedIn) and have ways for constituents to get in touch.

City Council, Committee or Commission Contact Information

- **City Website:** Most cities list their council members' contact details, including email addresses and phone numbers.
- **City Hall:** You can visit or call the city hall for direct contact details for council members.



- **Council Agendas and Minutes:** These documents often list council members' contact information.
- **Social Media and Newsletters:** Many city council members maintain social media profiles or issue newsletters that include contact info.

County Board of Supervisors Contact Information

- **County Website:** Most counties list each supervisor's contact details, including email addresses, phone numbers, and district office locations.
- **County Administration Office:** You can call or visit the county administration office to obtain direct contact information for supervisors and their staff.
- **Board Agendas and Minutes:** Official meeting agendas and minutes often include supervisor names, districts, and contact details.
- **Social Media and Newsletters:** Many supervisors maintain social media profiles and issue newsletters that share contact information and updates on county initiatives.

State Assembly Members and Senators Contact Information

- **State Legislature Website:** Both assembly members and state senators' contact details (email, office phone numbers) can be found on their respective state legislature's website.
- **State Government Directory:** Some states provide an online directory of elected officials with their contact information.
- **Political Campaign Websites:** Contact details for assembly members and senators are often available through their current or past campaign websites.

Congressional Representatives and Senators Contact Information

- **U.S. Congress Website:** The official U.S. Congress website ([congress.gov](https://www.congress.gov)) or individual congressperson websites provide up-to-date contact information (phone numbers, email addresses, etc.).
- **House and Senate Websites:** Each representative and senator has a page on the House or Senate website with their contact info.
- **Campaign Websites and Social Media:** Information is also available via campaign sites and official social media profiles.

California Air Resources Board Contact Information

- **CARB Website:** The CARB site lists contact details for board members, executives, and program leads.
- **CARB Calendar:** The calendar includes all previous and upcoming meetings CARB holds to connect with the public. Calendar items include presentation slides and meeting recordings that include relevant staff contact information.
- **CARB's Contact Us Website:** Includes contact information for various CARB programs and departments.

California Air Districts Contact Information



- **[Air District Websites](#)**: Each regional air quality management district maintains a website with contact information for the district's board members and administrative staff.
- **Government Directories**: Look for directories of public agencies at the state or regional level.
- **Public Meetings and Hearings**: Air districts often post public meeting notices that include contact details for staff and board members.

California Energy Commission Contact Information

- **[CEC Contact](#)**: This website includes contact information for staff in various departments.
- **[CEC Events](#)**: This website lists all of the CEC's upcoming events, many of which provide opportunities for public comment. Staff contact information is included in the meeting notices.
- **[CEC Dockets](#)**: Interested parties can submit written comments to the CEC docket for each project topic.

Tribal Government Leaders Contact Information

- **[Bureau of Indian Affairs \(BIA\) Tribal Leaders Directory](#)**: The BIA maintains an official, regularly updated directory of tribal chairpersons and other key officials with their contact details.
 - **Tribal Government Websites**: Many tribes have official websites listing leadership names, phone numbers, and email addresses.
 - **[National Congress of American Indians \(NCAI\)](#)**: Provides resources and links to tribal government contact information.
 - **Local or Regional Tribal Associations**: Regional intertribal councils often maintain up-to-date leader contact lists.
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How to Organize Contact Information and Track Engagement

This section dives into organizing contact information for your target audiences and tracking their engagement with your initiative. Recognizing that individual organizations may have limited capacity to track these items, listed below are tools and tips to help with streamlining the process.

Tools for Organizing Contact Information

- **Spreadsheet or Database:**
 - **Example Tools:** Google Sheets, Microsoft Excel, Airtable. Create a simple, customizable database where you can track:
 - Name, title, office address, phone number, email, and social media profiles.
 - Date of last engagement or meeting.
 - Topics discussed or issues raised during prior interactions.
 - Next steps or reminders for follow-up.

- **Sample Spreadsheet Columns:**
 - Name
 - Title/Position (Mayor, Council Member, etc.)
 - Contact Information (email, phone)
 - Office Address
 - City, District, or Region
 - Date of Last Contact
 - Topics Discussed
 - Next Steps/Follow-up Action

- **Subscription-based Customer Relationship Management Tools:**
 - **Example Tools:** Salesforce, HubSpot, or NationBuilder. These tools allow you to organize contacts by key groups type (e.g., mayors, assembly members, senators) and track your interactions with them.
 - **Features to Look for:** Ability to add notes, set reminders for follow-ups, and tag contacts based on specific attributes (e.g., “supports clean mobility initiatives” or “interested in sustainability policy”).

Tracking Engagement

- **Engagement Logs:**
 - Maintain logs in Customer Relationship Management tools or spreadsheets of all interactions with each contact. For example, when you sent an email, when they replied, and what the key takeaways were.
 - Include notes on what methods were most effective for engagement (email, phone, social media) and the level of engagement from each audience.
 - **Tracking Tools:**
 - **Subscription-based Email Tracking Tools:** Use tools like [Mailchimp](#), [Constant Contact](#), or [Streak for Gmail](#) to track if an email was opened or read. Free and fee-based versions available.
 - **Event Tracking:** Keep track of RSVPs, attendance, and engagement at events via platforms like [Eventbrite](#) or Google Forms.
 - **Task Management Tools:**
 - [Trello](#) or [Asana](#): You can create task boards to track when follow-ups are due and set tasks or reminders for next steps (e.g., "Send thank-you note to Rep. [Name] after event").
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How to Keep Contact Information Up to Date

Regular Updates

- **Monitor Legislative Changes:**
 - Regularly check for changes in officeholders (e.g., elections, resignations) on official websites like [legislature.ca.gov](#) for state representatives or [congress.gov](#) for federal lawmakers.
 - **Use Email Alerts:** Sign up for email alerts or newsletters from relevant government bodies to stay informed of changes in leadership or public contact info.

Direct Outreach

- **Confirm Contact Information:**
 - Periodically reach out directly to the offices of key contacts to confirm their contact information, especially after elections or major political shifts. For example, ask if their email address or phone number has changed.

Public Records and Announcements



- **Check Public Records:**
 - Legislative directories, public meeting minutes, or press releases often contain updated contact information for elected officials or key staff.
- **Social Media:**
 - Follow your targets on social media to stay updated on their professional contact information, as officials often update their contact details on their profiles.

Regular Review of Contact Lists

- **Quarterly Reviews:**
 - Set up a regular schedule (quarterly, bi-annually) to review and update your contact lists by cross-referencing with official directories and checking if any officeholder information has changed.
 - **Utilize Professional Networks:**
 - Leverage organizations, associations, and networks that may have updated contact lists for public officials or local/regional agencies. For example, professional associations for local governments often publish updated contact details for their members.
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How to Craft Messaging and Sample Outreach Templates

Prepare Key Information

Before sending any invitations, make sure you have the following details organized:

- Event date, time, and location
- Program highlights or success stories (e.g., how the funding has supported local transportation projects or improved community mobility) like written or recorded testimonials, photos of the program in action, survey data, etc.
- Your goal for the event (e.g., showing appreciation, publicizing achievements, networking)
- Any media or press coverage plans (in case the decision-makers wants to be part of that)
- A brief bio or background on your organization's mission

Develop Messaging Strategy

Tone: Be professional, yet warm. At the same time, recognize that decision-makers are busy and have a full schedule, so respect their time.



- **Subject Line:** Make sure it's clear and enticing, i.e., “Join Us in Celebrating the Impact of the program.”
- **Body Message:** Keep it concise but informative. Acknowledge the decision-makers' support and briefly explain the event's purpose.

Sample Messaging

Sample Invitation to Speak Email

Subject: Invitation to Speak at [Event Name] Celebrating [Program Name]
Dear [Decision-maker's Name],

On behalf of [Organization Name], I am pleased to extend an invitation for you to serve as a featured speaker at our upcoming event celebrating the success of the [Program Name].

[Insert brief description of program here—e.g., *This initiative has expanded access to sustainable transportation, improved air quality, and created new opportunities for communities across our city.*]

Your leadership has been instrumental in advancing this progress, and we would be honored to highlight your vision and commitment by including your remarks in the program. Your perspective would add tremendous value to the celebration and inspire our community to build on this success.

Event Details:

- **Date:** [Insert Date]
- **Time:** [Insert Time]
- **Location:** [Insert Location]
- **Speaking Role:** [Brief description—e.g., *5–10-minute keynote remarks during program highlights*]
- **Agenda:** [Brief outline—welcome, program highlights, remarks, networking]

We would be delighted to feature you as a distinguished voice at this milestone event. Please let us know your availability by [Insert RSVP Deadline]. I am happy to coordinate any details to ensure your participation is seamless.

Thank you for your continued dedication to advancing clean, equitable transportation in our state. We sincerely hope you can join us.

Warm regards,
[Your Full Name]
[Your Title]
[Organization Name]
[Contact Information]



Sample Invitation to Attend Email

Subject: Invitation to Celebrate the Success of [Insert Program Name]

Dear [Decision-maker's Name],

On behalf of [Organization Name], I would like to extend a heartfelt invitation to you for a special event celebrating the success of the [Program Name].

[Insert brief description of program here—e.g., *This initiative has expanded access to sustainable transportation, improved air quality, and created new opportunities for communities across our city.*]

This initiative has made a tremendous impact in our community, and we owe much of this success to your invaluable support.

The event will be an opportunity to showcase the strides we've made in improving sustainable transportation, highlight key accomplishments, and recognize your role in making it all possible.

Event Details:

- **Date:** [Insert Date]
- **Time:** [Insert Time]
- **Location:** [Insert Location]
- **Agenda:** [Briefly outline agenda—e.g., welcome reception, program highlights, remarks, networking]

We would be honored to have you join us as a distinguished guest, and we look forward to thanking you in person for your leadership and dedication to improving clean transportation in our state.

Please RSVP by [Insert RSVP Deadline]. If you have any questions or need additional details, feel free to reach out to me directly at [Your Contact Information].

We sincerely hope you can attend and celebrate with us!

Warm regards,
[Your Full Name]
[Your Title]
[Organization Name]
[Contact Information]



Sample Invitation Letter (Formal Letterhead Version)

[Your Organization's Letterhead]

[Date]

The Honorable [Representative's Full Name]

[Representative's Office Address]

[City, State, Zip Code]

Dear Representative [Last Name],

I am writing to personally invite you to a special event hosted by [Organization Name] to celebrate the remarkable impact of the [Program Name] program. [Include description of program here].

Thanks to your leadership and support, we have made significant strides toward advancing clean transportation solutions for our community.

The event will be held on [Date] at [Time], at [Location]. It will be an opportunity for us to thank you and other key participants, share updates on the program's progress, and showcase the positive changes made possible by your continued support.

Event Details:

- **Date:** [Insert Date]
- **Time:** [Insert Time]
- **Location:** [Insert Location]
- **Agenda:** [Briefly outline event agenda]

We would be deeply honored by your presence at this event, as it would give us a chance to personally express our gratitude for your critical role in funding and supporting the [Program Name]. Your participation would not only be appreciated but also send a strong message about the importance of sustainable mobility solutions for our state.

Please RSVP by [Insert Date], and do not hesitate to contact me at [Your Contact Information] should you require additional details or have any questions.

We look forward to the possibility of celebrating this milestone with you.

Sincerely,

[Your Full Name]

[Your Title]

[Organization Name]

[Contact Information]

Example Phone Call Script for Contacting Target Audiences

Phone Script: Introduction (First 30 Seconds)

- **Greeting:**
"Good [morning/afternoon], may I speak with [Name of Target Audience]?"
- **Introduce Yourself:**
"Hello, my name is [Your Name], and I'm calling on behalf of [Your Organization], a [brief description of your organization]."
- **Purpose of the Call:**
"I wanted to reach out personally to discuss an exciting project we're working on in your area — a state-funded electric bike-share program called [Program Name]. This project will help improve public transportation, reduce carbon emissions, and increase access to sustainable transportation for residents. I was hoping to discuss how we can engage with you and your office to share information about this project and explore opportunities for collaboration."

Phone Script: Key Message (30 Seconds to 1 Minute)

Highlight the Program's Benefits:

"The [Program Name] is designed to expand access to electric bike-sharing in the community. This would not only reduce traffic congestion but also contribute to your goals for improving air quality, reducing emissions, and providing affordable transportation options for residents. The program is aligned with current state and local sustainability goals."

Personalize the Impact:

For a Mayor or City Council:

"We believe this program will significantly benefit [City Name], and we would love your support in promoting its implementation."

For State Assembly Members/Senators:

"Your leadership in [district/region] has been crucial in advancing clean transportation policies. This program would complement your efforts by offering a local solution to reduce carbon emissions and promote healthier, more sustainable mobility options."

For Congressional Representatives/Senators:

"We understand your commitment to promoting sustainable infrastructure, and we



believe this bike-share program will be a valuable addition to the work you've already been doing in promoting clean transportation solutions."

For California Air Districts:

"The [Program Name] directly aligns with your air quality goals by reducing vehicle emissions and promoting greener transportation options. We'd love to discuss how we can work together to ensure the program is fully integrated with air quality improvement efforts."

Phone Script: Request Action (1 Minute)

- **Request for a Meeting or Call:**

"I would love the opportunity to speak further about how this program can align with your priorities. Could we schedule a brief meeting or a call to discuss this in more detail?"

- **Offer Flexibility:**

"I understand your schedule is busy, so I'm happy to work around your availability. Would [suggest two specific dates/times] work for you, or would you prefer a different time?"

- **Optional: Share Event/Program Details:**

"Also, we are hosting a [mention event if applicable, e.g., interested group meeting or community event] to discuss the bike-share initiative, and we would be honored if you could attend. It would be a great opportunity to see how the program will benefit the community firsthand."

Close the Call (Last 30 Seconds)

- **Confirm Details:**

"Just to confirm, we're scheduled for [meeting date/time], and I'll send you a calendar invite with all the details. Is there anything else I can provide for you at this time?"

- **Express Gratitude and Reaffirm Contact:**

"Thank you for taking the time to speak with me today, [Name]. I really appreciate your commitment to improving transportation options in our community. I look forward to working with you on this important initiative."

- **Exit:**

"Have a great day, and I'll follow up with that meeting invite shortly."



Tips for Phone Outreach

- **Be Prepared:** Before making the call, have key points about the project handy, along with any relevant stats or facts that highlight the benefits of the program.
 - **Be Respectful of Time:** Make sure to keep the conversation brief and focused, especially if the person you're calling is busy.
 - **Adapt Based on the Audience:** Depending on who you're speaking to (e.g., mayor vs. air district), adjust the language to focus on the aspects most relevant to them (e.g., sustainability for elected officials vs. air quality for state air districts).
 - **Have a Follow-Up Plan:** If they agree to a follow-up meeting, make sure to send a confirmation email with meeting details and any materials that might help them understand the program better.
 - **Follow Up with a Thank-You:** After the call, send a thank-you email, reiterating the key points discussed and confirming the meeting or next steps.
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Follow-up Email Sample

- **Timely Follow-Up Email:** A few days before the RSVP deadline, send a gentle reminder, thanking them again for considering the invitation and reminding them of the event details.

Example Follow-Up Email:

Subject: Friendly Reminder: [Program Name] Event RSVP

Dear [Representative's Name],
I'm sending a quick reminder about the upcoming [Program Name] event on [Event Date] at [Event Time]. We would be thrilled if you could join us and celebrate the success of this important program.

Please RSVP by [RSVP Deadline], and feel free to reach out with any questions. We look forward to the opportunity to thank you in person for your invaluable support.

Best regards,



[Your Name]

[Your Contact Information]



The Clean Mobility Equity Alliance is funded by California Climate Investments, a statewide initiative that puts billions of Cap-and-Invest, formerly known as Cap-and-Trade, dollars to work reducing greenhouse gas emissions, strengthening the economy, and improving public health and the environment — particularly in disadvantaged communities.