



# Toolkit for Action: People, Public and Stakeholder Engagement

Updated as of March 2024 ●

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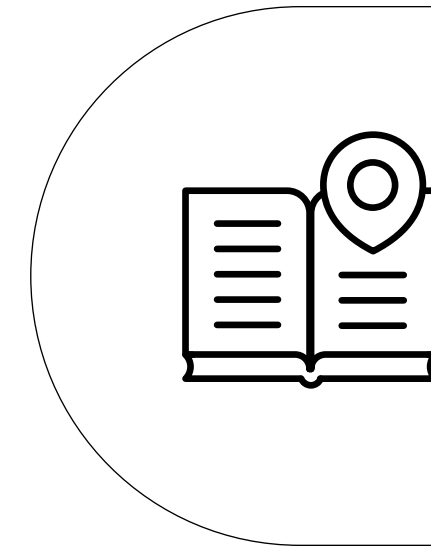
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# What This Toolkit Is and Isn't



This toolkit is intended to guide you on our collective journey and reinforce the entrepreneurial spirit that has been the bedrock of our System. It's an invitation and shared resource to ensure our actions are aligned with our unwavering commitment to feeding and fostering communities.

This is an optional resource for independent Owner/Operators. Owner/Operators may choose to use all, some, or none of the information from these resources that will be helpful to them.

## What This Toolkit Is

- ✓ A **collection of helpful resources** gathered to support increased understanding and action
- ✓ A **primer on proactive steps** to preserve our franchise business model and engage in our communities
- ✓ A **guide for coordinated action** and involvement across the four pillars of People, Reputation, Legal, and Legislation
- ✓ A **repository of best practices** for communicating our values and mission to a broader audience
- ✓ A **catalyst for informed advocacy**, providing context and content to champion efforts
- ✓ A **strategic companion** offering guidance to navigate the complexities of labor and public perception

## What This Toolkit Isn't

- ✗ A **replacement for conversation** with peers, field representatives, and subject matter experts across each of the national labor strategy pillars
- ✗ A **one-size-fits-all mandate** – it requires your specific context and local knowledge
- ✗ The **sole source for action** – it should be complemented with current insights and updates
- ✗ A **static document** – this will be a living document, updated periodically, and will continue to be elevated as a reference tool in System communication
- ✗ A **defensive playbook** – it's about building positive narratives rather than responding to external pressure
- ✗ An **exhaustive legal or legislative guide** – it should be used in conjunction with guidance from your legal counsel and in alignment with current regulations



02

# Actions to Take Now

# A Holistic Approach to Preserve Our Business Model



## People

### Commit to People.

Power a culture of care by investing in EVP efforts and providing opportunities to learn and grow.



## Reputation

### Amplify Our Reputation.

Tell authentic and credible stories that showcase who we are and what we stand for.



## Legislation

### Advance fair and equitable legislation.

Meet with lawmakers, illustrate the economic impact of restaurant owners, increase our leverage.



## Legal

### Anticipate and act on legal allegations.

Stay informed, defend against meritless claims, don't wait.



03

# Action 1: Commit to People



Please share your feedback by contacting our People expert:

**SHAMMARA HOWELL**

Vice President, Chief Field People Officer

[Shammara.Howell@us.mcd.com](mailto:Shammara.Howell@us.mcd.com)

# How We Commit to People: Strengthening the Fundamentals

Ray Kroc said it best:

**“People are what made us the best and keep us the best.”**

Our continued success as a business is only possible because of our shared commitment to creating a culture of care in your restaurants. The more we show people we care – about them, their work, and their futures – the more they care for the customers and communities we serve.

Restaurants that uphold this commitment and cultivate a safe, respectful, and inclusive workplace are more likely to have higher employee engagement, satisfaction and retention. Some steps you can take include:

- **Establish a strong foundation** with the fundamental people practices.
- **Identify gaps** in your Employee Value Proposition (EVP), wages and benefits to better position you as a market leader.
- **Keep the momentum going** by actively engaging with your people and communities.



**Remember, good people practices make for good people stories!**



# Establish a Strong Foundation

- **Foster Safe, Respectful, and Inclusive Workplaces** that create an environment where people of all backgrounds feel safe, valued, and appreciated.
- **Continue your focus on Fundamental People Practices** with an increased focus on listening and onboarding.
- **Make sure that employees have the right tools and resources** to do their jobs effectively, supported by best practices and templates such as **Fix it Fast**.

We are proud of the fact we became **the first QSR-brand to implement People Brand Standards** that ensures workplaces live up to the core values, setting a strong foundation for better execution.





# Identify Gaps

With the Fundamentals in place, you can shore them up by **identifying gaps and becoming market leaders with EVP, wages, and benefits** that differentiates our brand and demonstrates investment in people.

## Design and Deliver Your Unique EVP

- **Custom resources** are available to you such as this **customizable EVP poster** to post in crew rooms and share at orientation to maintain employee awareness.
- **The EVP Hub** is another resource and one-stop-shop of all EVP resources to support consistent, strong execution of EVP programs.
- Learning execution is another key pathway to provide your people with opportunities for long-term growth.
  - Transformations are underway to modernize the **learning experience** and accelerate capabilities. Consistent focus on training new and tenured employees is important to build confidence, drive engagement, and enable key operations initiatives.
  - Programs like **Archways to Opportunity** are just one example of how you can prioritize and deliver opportunities for crew in ways that go beyond the restaurants.

# Keep the Momentum Going

- Continuing to level up your commitment to people is essential to driving business success and continuous improvement.
  - The **Listening Toolkit** contains optional resources to maximize your always on listening strategy with ideas on how to build connections with crew, how to optimize survey administration, and more.
  - Our **Action Planning Guide** provides helpful tips on how to keep survey feedback alive to help build accountability and credibility.
  - The **Community Partnerships Playbook** has several ideas and best practices to engage your employees in the community and enhance your local employer brand.



04

# Action 2: Amplify Our Reputation



Please share your feedback by contacting our Reputation expert:

**TESS MATTINGLY**

Director, Brand Trust Communications

[Tess.Mattingly@us.mcd.com](mailto:Tess.Mattingly@us.mcd.com)



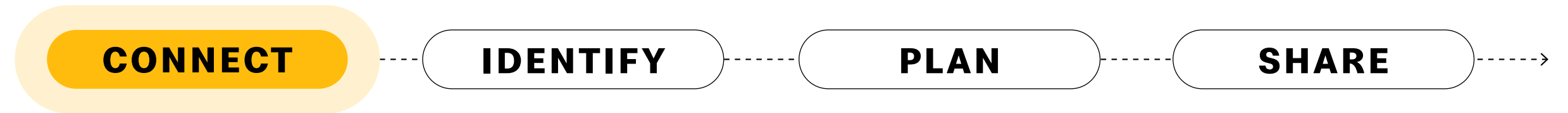
# How We Amplify Our Reputation: Tell Your Story

- **Your voice matters.** Lean into an always-on storytelling approach that demonstrates to the public, lawmakers, and opponents the positive things about you and your restaurant.
- **Stories exist all around you – don't overthink it.** They don't have to be formal or lengthy – they can show up organically in conversations, not just in published articles and formal news reports. It only takes a few minutes to identify, plan, craft, and share the great things that are already happening *everyday*.
- **Now Serving® is a storytelling resource for you.** This is a **platform** you can leverage for creative, messaging, and tips. Your Field Teams can help you connect your story to the Now Serving effort. For any questions, please reach out to the team at [nowserving@us.mcd.com](mailto:nowserving@us.mcd.com).



# How to **Connect** with Your Local Field Team

## Tell Your Story



01

Your local Field PR team and Agency partners are here for support as you craft your unique stories.

**Contact** your local PR agency or **local Field PR Manager**.

If you don't know or have a contact in your area, please reach out to **nowserving@us.mcd.com**.

02

**Collect** the best stories stemming from your restaurant or community early and often. your local field team has tools and resources to elevate the great work you're doing.

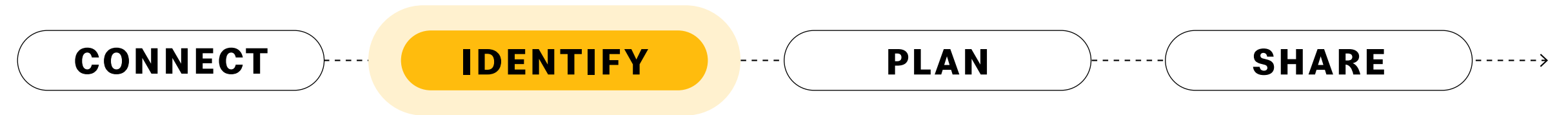
03

**Collaborate** with your restaurant crew and community members as partners to get your story out there – whether it's through a **Thank You Crew** moment, a community event at your restaurant, a local media interview, social post, etc., they can work with you to choose the right topic, message, and channel for your story.



# How to Identify a Restaurant Story

## Tell Your Story



**Showcasing who we are and what we stand for is critical for gaining support. While we regularly share messages of our National efforts, the best, most impactful stories come from YOU.**

Use the questions to the right to help **Owner/Operators identify a Now Serving® story about their restaurant** – how they care for their crew, serve their customers, and uplift their community.

- Do any of my top employees have a special milestone coming up (e.g., a 10-year anniversary with our restaurant)?
- Have any of my crew been recognized/complimented for a unique action by a customer?
- Is there a local celebrity or notable leader who had a job at McDonald's and is therefore part of **1 in 8**?
- Am I supporting a local community organization through donations or partnerships?
- Am I running a fundraiser or food drive for a local community organization?
- What's my restaurant's contribution to RMHC®?
- Has anyone in my restaurant crew received national scholarship awards, like Archways to Opportunity, Black & Positively Golden®, or HACER®?
- Who has gone above and beyond in my restaurant to create a great environment for other crew and customers?
- How have we provided relief amidst a natural disaster?
- Who in our community have we invited to our restaurant to share a meal (e.g., local organization leader, lawmaker)?



# How to Identify an Owner/Operator Story

## Tell Your Story

CONNECT

IDENTIFY

PLAN

SHARE

**People want to know who their local business owners are and their experiences.**

Your restaurants are a visible presence in the community, and sharing this story builds trust and connection. Here are some questions to **help you articulate your own story.**

- Where am I from?  
How did I arrive to this location/community?
- Am I a former crew member or manager?  
How did that experience shape my approach?
- Who or what motivated me to become an Owner/Operator?
- Why did I choose McDonald's?
- What are my strongest values and how do they show up in my decisions and actions?
- What challenges did I overcome along the way? How?
- What causes matter most to me, and how have I been able to give back?
- How engaged am I in my community?  
Do I hold any community leadership positions?
- How do crew members inspire me?
- What does my organization's EVP look like in action?
- What unique benefits do I offer crew at my restaurants?



# How to **Plan** a Story

## Tell Your Story

CONNECT

IDENTIFY

PLAN

SHARE

### Once you identify a story you want to tell, take a few minutes to think through your audience:

- Who is the audience (e.g., general public, local community, legislator)?
- What is the context (e.g., posting to social media, meeting one on one with a legislator)?
- What outcomes do you want to create? Is there a specific ask?
- What do we need them to do, believe, and know? How will they want to feel?
- What are their concerns?
- What stories have they already seen or heard about my restaurant or me?
- What else is going on in their world right now?

### Based on your audience and the story you want to tell, think about the structure:

- What's the right length (e.g., back-pocket conversational story, social media post, long-form news article)?
- Do I want to feature anyone in my story (e.g., crew, customer, community member)?
- How do I talk about my values?

### With this plan in place, supplement your story with data that already exists (See [Oxford Economic Reports and Fact Sheets by State](#)):

- Diversity of operators
- Jobs created/supported
- Tuition assistance totals
- RMHC® donations

# How to **Share** a Story

## Tell Your Story

CONNECT

IDENTIFY

PLAN

SHARE

With your story in hand, you're ready for the next phase. **Consider the following questions before you begin distributing:**

- Have I shared/discussed it with my **Field PR Manager**?
- For legislator conversations: Have I connected with my region's **GR Manager** for best practices and tips?
- Does my BU have a PR agency in place to help share this across McDonald's co-op social channels?
- What is the best format to share it (e.g., print, video, quote)?
- Based on our intended audience, how do we get it out (e.g., social media, mailing, email, poster, event, digital signage)?
- Where should this content live (e.g., our social media page, our website)?

Once complete, catalogue it and repeat! Building a repertoire of stories enables you to draw on a personal well, whenever you need it.



# Share a Story: Process Example, At-A-Glance

## Tell Your Story

CONNECT

IDENTIFY

PLAN

SHARE

### Connect

#### Where do I start?

I shared my initial ideas with the **Field PR** Team.



### Identify

#### Was I a former crew member? How does that shape my approach?

Example: Yes. Starting out as a crew member provided me a priceless opportunity to understand the value we deliver in our local communities and motivated me to pay it forward one day.

### Plan

#### Who or what motivated me to become an Owner/Operator?

I wanted to push myself to reach greater heights and provide the same opportunities to succeed to the next generation of the 1 in 8.

#### What outcomes do I want to create? Do I have a specific ask?

I want others to understand the impact they can make by simply creating a culture of care for my team and customers alike.

#### How do I talk about my values?

My commitment to hard work and giving back is evident in my steady pursuit of excellence and elevating not just myself, but my whole team.

# Share a Story: Owner/Operator Example

## Tell Your Story

CONNECT

IDENTIFY

PLAN

SHARE

Crew member  
1980

Store manager  
1985

Franchise owner  
1998

Community Pillar  
2024

### Share

Betty, a proud Owner/Operator, worked with the Field PR & Brand Communications team to shape her story and amplify a remarkable milestone to the System in **McFamily Moments**.

Betty's journey with McDonald's mirrors a story of dedication and success. Starting as a crew member in 1980 at a bustling city outlet, she quickly demonstrated her commitment and leadership skills. Within a year, she was promoted to shift manager, thanks to her exceptional customer service and team management. By 1985, Betty had become a store manager, overseeing operations and staff training.

Her journey didn't stop there; in 1998, Betty took a significant leap, becoming a franchise owner. Betty focused on creating a positive work environment, offering benefits like health insurance and educational opportunities to her employees. Her dedication to community service and excellence in customer relations earned her recognition within the McDonald's community.

Today, Betty celebrates over 30 years in the business. She remains passionate about her work as she did on day one as a crew member, often quoted saying, "The key to success is caring for your team and customers alike."





05

# Action 3: Advance Fair and Equitable Legislation



Please share your feedback by contacting our Legislation expert:

**MELISSA WALSH**

Vice President, Government Relations

[Melissa.Walsh@us.mcd.com](mailto:Melissa.Walsh@us.mcd.com)



# Current Legislative Activity in Your State

- While we encourage everyone to play an active role in this national effort, it's important to understand how the impact of direct attacks vary by state.
- On a regular basis, the National Labor Working Team runs an analysis to understand which states will likely be targeted in the near term.
- This data allows us to be more proactive in our efforts, and it's very advantageous to have time on our side.
- Threats are emerging in other states, showing that even historically business-friendly jurisdictions are not immune to anti-QSR legislation.

To help you understand the risk in your state, **we will regularly review your state's risk report in BU meetings.**

You can also request your state's report by emailing **GR Manager**.

# An Example of What We Do and Don't Stand For

**The company has selectively chosen when to take a stand on key issues impacting our business model - including advocating for fair policies. Here are some examples of recent engagements by U.S. President Joe Erlinger.**

**In a message from U.S. President Joe Erlinger that was published on our McDonald's Newsroom, Joe speaks to the importance of advancing fair and equitable legislation and the positive impact of preserving the franchise business model:**

**“As we continue to navigate this dynamic political environment, standing up for what we believe in must take many forms. We must be clear about our values, and our unique contribution to the local communities we serve through the franchised model.**

Sometimes, this requires strongly opposing municipal or state legislation that has potential for national implications. It also prompts us to stand up for policies that we believe are good for our people and business.

While many states are seeking to pick “winners” and “losers,” we know legislation that creates a level playing field is ultimately good for our people, our communities and all three legs of the stool.

We welcome legislation that supports small business owners and the franchised business model. We have and will continue to champion policies that do not impede our ability to engage with and meet the needs of employees as well as those that align with our values.”





# An Example of What We Do and Don't Stand For

**The company has selectively chosen when to take a stand on key issues impacting our business model - including advocating for fair policies. Here are some examples of recent engagement by U.S. President Joe Erlinger.**

**In a message from U.S. President Joe Erlinger that was published on our McDonald's Newsroom, Joe illustrates how the System demands better from elected officials.**

**“Its proponents say their bill should be a model for other states (and special interest groups are directing money to make this a reality). This should raise alarm bells across the country.**

That's because California's approach targets some workplaces and not others. It imposes higher costs on one type of restaurant, while sparing another. That's true even if those two restaurants have the same revenues and the same number of employees.

Let me explain how. If you are a small business owner running two restaurants that are part of a national chain, like McDonald's, you can be targeted by the bill. But if you own 20 restaurants that are not part of a large chain, the bill does not apply to you. For unexplainable reasons, brands with fewer than 100 locations are excluded. Even more mystifying, the legislation excludes certain restaurants that bake bread. I can only conclude this is the outcome of backroom politicking.

This is a clear example of picking “winners” and “losers,” which is not the appropriate role of government.”



# Partner with Your GR Manager

## How Can My State or Local GR Manager Help?

Lean on your GR Manager or contact to broker a meeting with your local legislator. They will facilitate the connection as well as talk through what you need to know leading up to, during, and following your visit. To get started, you should:

- Reach out to your GR Manager to express interest. Please review the GR Manager coverage **map** if you are unsure who your GR Manager or contact is.
- Send **template message** to your local legislator and copy your GR Manager.
- Schedule a pre-meeting with your GR Manager to discuss:
  - Schedule a **meeting** with your Legislator
  - Goals and outcomes for the meeting
  - Legislator profile (background, legislative record, what they care about)
  - Story selection and key facts to share
  - If and how you plan to amplify your visit (social media post, message to fellow Operators, etc.)
- **Follow up** on any specific asks and determine your next planned interaction (**restaurant visit**, community event, etc.).

# Legislative Do's and Don'ts

In any year, lawmakers will consider thousands of bills. It is impossible for them to be experts on all issues. Your input is invaluable as many lawmakers have never been small business owners and even less have been restaurateurs.

Your insight will go a long way in helping educate and inform them of the many issues that restaurateurs face daily. You do not need to be a professional lobbyist to have influence. Your personal experience and insight is valuable and informative.



## For Starters:

- **Address the lawmakers correctly.** Assembly Member or Representative, Senator, Governor, Mayor, Council Member or Alderman, etc.
- **Be personal.** Identify yourself as a constituent and identify your restaurant locations.
- **Provide “real life” examples** to illustrate your involvement within the community.
- **Be brief, specific, and ask for follow up.** You have only a few lines or a few minutes to make your case, so use them well.
- **Use your regional Government Relations manager as a resource,** particularly if fundraising, hospitality, or sponsorships are being discussed. Our GR managers have a wealth of knowledge regarding campaign finance, lobby, and ethics rules, with access to legal experts, and can help navigate these types of discussions.



# Legislative Do's



**Highlight economic impacts** your restaurant has on the local economy – including suppliers used, products purchased, employment statistics and tax revenues generated. Legislators are intensely interested in the health and well-being of their district's economy. Provide information about how your restaurant is a **positive force** in their economy.

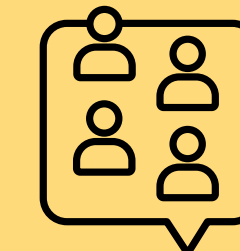


**Emphasize what we will and won't support.** Emphasize to lawmakers and voters the benefits of the franchise model and help legislators understand why certain legislation might harm successful local businesses.



**Share community activities**  
Legislators are very interested in the “good work” groups are doing in their districts.

- Be active in local business groups
- Host community gatherings such as:
  - McTeacher's Night
  - Coffee With a Cop
  - Park/Street Clean-Up Events
- Contribute to philanthropic giving
  - RMHC® fundraisers
  - Drives (e.g., food, clothes)
  - Giveaways (e.g., turkeys)
  - Disaster relief



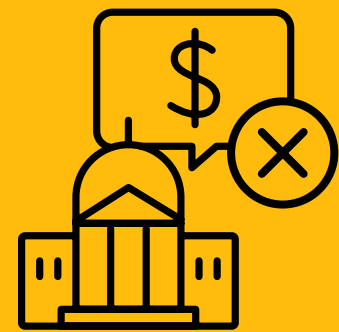
**Showcase your people.**  
If possible, share how many employees you have. Discuss achievements, like:

- Archways to Opportunities graduations
- Big milestones and anniversaries
- **1 in 8 celebrations** connecting current and former crew
- “Thank You Crew” nomination recognitions



**Talk about the positive value of McDonald's products** and the care and quality of food preparation in your restaurant. The removal of artificial coloring and antibiotics within our McNuggets®, the inclusion of fruit and the option of water, milk or juice within the Happy Meal®, etc.

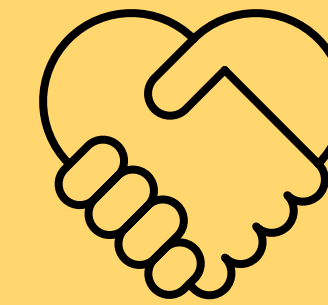
# Legislative Don'ts



**It is against the law to connect official action with contributions, donations, or gifts.** Never discuss money, fundraisers or give campaign contributions when discussing legislation or other official action.



**Don't overemphasize policy issues.** Don't feel you like you need to lean solely on "issues" with the legislator. The goal of the visit is to help them better understand "The McDonald's You Don't Know" and build a relationship with that legislator. Emphasize the themes of **economic impact**, **community outreach**, and **food quality**, not policy positions.



**Don't become confrontational with the state legislator.** There are many "hot button" issues people like to discuss with elected officials – but this is not the venue for such a discussion.



# Conversation Outline for Meeting with Your Legislator

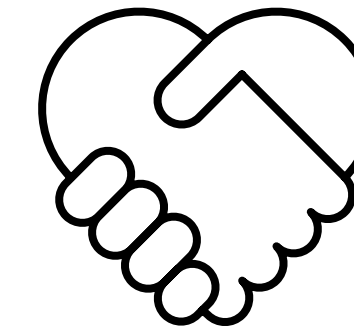
The conversations you have with your local legislators depends on the current relationship and the goals you want to accomplish. In addition to the topics below, take time to understand their professional and political agenda, but also their personal interests towards building trust and relatability.

- **Introduce yourself:** Identify yourself as a constituent of the community, and share your restaurant locations to create relatability to the issue or topic at hand.
- **Local Economic Impact:** Emphasize how your restaurant contributes to the local economy, both in terms of employment and revenue. Use the [Oxford Economics](#) website information available for your region.
- **Increased Operating Costs:** Discuss how increased costs may impact future decisions/approaches.
- **Impact on Employees:** Discuss how increased costs may impact future employment decisions/approaches.
- **Consumer Consequences:** Make a case that higher operating costs will likely lead to higher prices for customers.
- **Potential for Closure:** Discuss the worst-case scenario – closing down the restaurant – emphasizing the loss to the community and the local economy.
- **Ask for Alternative Solutions:** Suggest alternative ways to achieve the legislation's goals without harming local businesses like yours.
- **Personal Stories:** Share stories of your employees and regular customers to create an emotional connection with the issue.
- **Community Support:** If possible, bring petitions or letters from other community members who oppose the legislation.
- **Commitment:** Close by asking for a commitment to vote no, or to further consider your arguments.

# Get to Know Your Local Legislators

## Engage With Elected Officials

- Sign up for legislator newsletters or follow them on social media.
- Participate in Hill or City Hall Days.
- Attend in-district events and town halls.
- Contribute and attend fundraisers and receptions.



## Develop a One-to-One Relationship

- **Building influence is all about the relationship.** Get to know your local legislator and what matters most to them. Show your continued support through attending fundraisers or donating with input from your GR manager.
- **Deep relationships take time to build** – they usually don't happen through a single interaction. Build a level of frequency with your local legislator that deepens the relationship and advances the conversation toward your shared objectives.
- **Establish a connection.** All politics are local, so lead with the grassroots connection. Say you are a McDonald's Owner/Operator and a constituent. If they don't already know you, mention a shared connection if you have one – an event where you met, an organization you both belong to, a common acquaintance, etc. If there is no link, simply mention you are a local business owner in their district – they want to hear from you.



# Find Your Federal, State, and Local Representatives

## Knowing your local legislators is critical for growing our presence in our communities

The Oxford Economics Website includes the link to find your local representative if you're unsure of who they are.

*Knowing your local legislators is critical for growing our presence in our communities:*

**Find Your Local Representative**

Click here or scan the code to access our economic impact site:



## Explore national impact and across all 50 states of the McDonald's System

### United States Impact Totals

GDP Impact  
**\$76 Billion**

Jobs Supported  
**1.2 Million**

Total Taxes Generated  
**\$15 Billion**

Tuition Assistance Through Archways to Opportunity®

**\$26.4 Million**

Paid to Selected Local Suppliers  
**\$9.4 Billion**

Funds Raised for Ronald McDonald House Charities® (RMHC)

**\$40.2 Million**

**Explore Our Full Impact in the US**

**McDonald's Multi-Billion Dollar Impact**  
Local Restaurants, Local Impact

McDonald's is a collection of local restaurants run by small business owners in all fifty states. These franchisees are embedded in the communities where they operate – feeding their communities, driving opportunities that fuel the fact that 1 in 8 Americans have worked at McDonald's, and taking care of their neighbors through initiatives like the Ronald McDonald House Charities.

These local businesses ripple out economic impacts – playing an integral role in state economies, supporting jobs and local businesses across all fifty states, and driving economic opportunity for independent owner/operators, restaurant crew, and local suppliers.

**Economic Impact Findings**  
Explore national and state-by-state impacts of the McDonald's System





# Introduce Yourself to Your Legislator

## Message Template to Introduce Yourself to a Legislator

Dear [Legislator Name],

My name is [Your Name]. I am a McDonald's local business owner in [Location] and have been for the last [#] years. I own and operate [#] McDonald's restaurants and employ [#] people. I am writing this email to introduce myself. As I am sure you agree, it is vital for local business owners like me to have open lines of dialogue and communication with government leaders.

Over the past few weeks, I have [donated over 100 burger patties, 300 cheese slices, and 500 bags of apples to local food banks in Liguria].

If there are any additional ways we can partner together in the future, please let me know. I am committed to giving back to the community I proudly serve daily.

I also would like to invite you to visit one of my restaurants. I believe it would provide you with an insider's view to how we operate and allow you the opportunity to meet with some of your constituents. I am willing to coordinate with your staff on logistics and a robust agenda.

In the meantime, please do not hesitate to reach out to me. I hope you will consider me a partner. For your reference, my cell is [(555) 555-5555].

Thank you for your time and attention.

Sincerely,  
[Your Name]



# Set Up a Meeting with Your Legislator

## Message Template to Set Up Meeting

Dear [Legislator Name],

My name is [Your Name] and I am a proud owner and operator of [#] local franchised McDonald's restaurants in your district.

I am part of a collection of local business owners who are concerned about the recent legislative attacks against our restaurants. Embedded in the communities where we operate, we proudly drive opportunities that fuel the fact that 1 in 8 Americans have worked at McDonald's. Locally and nationally, we're committed to new opportunities for employment, growth, and community empowerment through the Ronald McDonald House Charities.

I would love the opportunity to speak with you further about why our collective business model is worth preserving and share more about the role our local businesses play in economies across all fifty states.

Thank you in advance for considering my request. Please contact [GR Manager/Contact Info] to arrange a time for us to meet. We look forward to hearing from you soon.

Sincerely,  
[Your Name]



# Thank Legislator for Meeting

## Message Template to Follow-up After a Meeting

Hi [Legislator's Name],

As a proud owner and operator of [#] local franchised restaurants in your district, I wanted to thank you for taking the time to discuss the devastating impacts [Bill] would have on local franchised restaurant owners like me. As a recap, I've included a brief summary of our discussion below and reattached our fact sheet for your reference.

[Summary of Bill/Conversation]:

[Assembly Bill XYZ directly and intentionally undermines my ability to independently operate my local restaurants. It would force national fast-food companies to exert more control over the operations of local franchised restaurants – eliminating the local control franchise restaurant owners have to operate our small businesses.

As a result, this bill would turn my locally run family business into a corporate restaurant – stripping me of my authority and rights as a business owner and effectively turning me into middle management working for the corporation.

Simply put, Assembly Bill XYZ would erase much of the progress my family has made to build economic equity and generational opportunity for our family and community.]

Thanks again for taking the time out of your busy schedule to meet with me. I would like to offer myself as a resource to you and your staff as you consider bills that may have an impact on the franchise model or the quick-service industry. Please feel free to reach out to me directly if you have any follow-up questions. Once again, I respectfully ask you to please protect local franchised restaurants in your community and oppose [Bill].

Sincerely,  
[Your Name]





# Invite Legislator to Your Restaurant

## Message Template to Invite Legislator

Dear [Legislator's Name],

I hope this letter finds you well. My name is [Your Name], and I am a proud owner and operator of [#] local franchised McDonald's restaurants in your district.

We are hosting a [Community Event/Restaurant Tour] on [Date] at [Location], from [Start Time] to [End Time]. This event aims to [Explain the purpose: e.g., raise awareness about local businesses, celebrate a milestone, introduce new community initiatives, etc.]. We would be honored if you could attend and share your insights as our local representative.

This will be an excellent opportunity for you to engage with your constituents and witness firsthand the positive impact that local businesses like McDonald's have on the community. Our planned activities include [List Activities].

[Include any additional details and logistics]

Please RSVP by [Deadline], so we can make appropriate arrangements. If you are unable to attend but would like to tour our facility at another time, we would be more than happy to accommodate.

Thank you for your time, and we hope to see you there.

Sincerely,  
[Your Name]



# State & Local Political Funds

## What is a state Operator Fund?

- The purpose of a state Operator Fund, typically set up as a Political Action Committee (PAC) and 501(c)(4), is to fund “always-on” political activities, like lobbying, donations, paid media, coalition building, and research.
- GR, legal, and external partners are available to help guide the development of a fund, including:
  - The objective of the fund
  - Structural governance and continued legal and logistical support
  - The funding goal
  - Campaign planning and management

## Where can I donate to my state’s Operator Fund?

- McDonald’s is working collaboratively with elected Owner Operator leadership to prioritize the co-creation of State PACs in the highest-risk states. As one example of work done by a State PAC, we are pleased to share the work of New Yorkers for Local Businesses:
  - **Local Business**
- You can contribute to the federal PAC by going to [www.mcdpac.com](http://www.mcdpac.com), or contact **Anne Foley** (Federal PAC Lead) or **Peggy Osterman** (State PAC Lead) with any questions.



# McDonald's Federal PAC Overview

- The McDonald's Corporation Federal Political Action Committee ("McDonald's PAC") is a political committee, which, in accordance with federal law, **solicits and pools voluntary contributions** from McDonald's U.S. Owner/Operators and eligible corporate employees and uses those funds for making political contributions to support qualified federal candidates for Congress.
- McDonald's PAC is bipartisan and as such **can work across party lines** to promote policies that reflect an understanding of the McDonald's system.
- As federal law generally prohibits corporations from making contributions in federal elections, **the success of McDonald's PAC** rests with those McDonald's U.S. Owner/Operators and corporate employees who are eligible to personally support the PAC.
- The McDonald's Political Action Committee (McDonald's PAC) was established to protect, preserve, and further good government, the private enterprise system, and particularly, the business climate the McDonald's system operates within. **Our potential is amplified** when government policies promote growth, create jobs, and encourage investment in our business. These policies also support our System, employees, franchisees, and communities where McDonald's restaurants operate.
- The McDonald's System **plays a visible and proactive role in various policy discussions**, clearly communicating our viewpoints to those shaping policies that can affect our global business environment.
- The process of determining which candidates to support is complex. In general, we **focus on those who support the McDonald's business, can champion our policy goals, and have influence on the issues vital to the System.**



# Contribution Criteria

Our PAC Board and government affairs team will evaluate a candidate's eligibility to receive a political contribution based on the following criteria (not listed in order of importance):

- Understands policy issues of importance to the McDonald's System.
- Holds an elected leadership position and/or serves on a key Committee with jurisdiction over policy issues of importance to the McDonald's System.
- Former McDonald's crew member, Owner/Operator, or someone previously involved in the McDonald's System.
- Exhibits a commitment to the McDonald's System.
- Exhibits commitment to the furtherance of good government, respect for the democratic process, and adherence to the rule of law.
- Possesses leadership qualities as an emerging leader.

No single issue or criteria category will determine whether a candidate does or does not receive a contribution. Political contributions are evaluated every election cycle. McDonald's PAC may support a candidate in one election cycle, and subsequently elect to withhold future support at any time based on the criteria outlined above or for other reasons. Information on all of the McDonald's PAC's political contributions is publicly available through the **Federal Election Commission's website**.



# McDonald's Federal PAC Steering Committee Members 2023–2024

## Owner/ Operators

- **VICTOR LIM**  
O/O Co-Chair, AMOA, HI, Walnut Creek FO
- **HARRY (SANDY) CHAPMAN**  
O/O Member, NY, Bethesda/Stamford FO
- **JIMMY WILLIAMS**  
O/O Member, MO, NFLA GR Chair
- **ALEX MENDOZA**  
O/O Member, MHOA, OH, Columbus FO
- **HUGH O'REILLY**  
O/O Member, KS, Dallas/Denver FO

- **SEAN PIAZZA**  
O/O Member, CA, Long Beach FO
- **JULIE PERNECKY**  
O/O Member, WON, CA, Long Beach FO
- **RON SMITH**  
O/O Member, NBMOA, NV, Long Beach FO
- **MARTHA BALL**  
O/O Member, MOOPN Chair, OK, Dallas FO
- **COSMO FAGUNDO**  
O/O Member, MHOA, CA, Walnut Creek FO

## Corporate

- **SAM TATEVOSYAN**  
Interim Co-Chair, Home Office, Vice President, Global Public Policy and Government Relations
- **TOM DILLON**  
Treasurer, Home Office, Senior Vice President and Chief Financial Officer
- **HARRY THOMAS**  
Member, Home Office, Vice President and Managing Director McOpCo & Restaurant
- **ANNE FOLEY**  
Interim Member, Home Office, Supervisor, Federal Government Affairs and PAC

# PAC Resources in Action

## The New York State Campaign – Off to a Strong Start

Operators in New York are hard at work strengthening our state-level political approach through the launch of a new Operator-led political fund called **New Yorkers for Local Businesses** that will serve as a national model and has already had considerable fundraising success.



# The California Campaign

## How Owner/Operators Mobilized in 2023

I want to know more: [AB1228 By The Numbers](#)

**1000+**  
franchisees opposed to  
AB 1228 across 68 brands

**100%**  
franchisees met with all  
120 legislative offices

**3000+**  
calls and emails  
to legislators

**Franchisees appeared in ads,  
press events, and more.**



### Hosted 2 Sacramento Fly-In Days

- **150+** franchisees across **30** brands
- Franchisees completed meetings with all **120** legislative offices
- Press conference with **120** franchisees

### TV ADS



- **5,321** times TV spot ran
- **4** TV ads developed
- **2** TV ads aired
- **6** franchisees filmed

### DIGITAL ADS



- **61.5M** digital ad impressions
- **25.5** video views
- **14** target assembly districts
- **8** target senate districts
- **627** digital banner and video ads developed



06

# Action 4: Anticipate and Act on Legal Allegations



Please share your feedback by contacting our Legal expert:

**PEGGY OSTERMAN**

Managing Counsel, U.S. Strategic Initiatives

[Peggy.Osterman@us.mcd.com](mailto:Peggy.Osterman@us.mcd.com)



# Legal Compliance as a Business Imperative

**We know Owner/Operators are deeply committed to running organizations where their people feel welcomed, valued and part of a community.**

Core to that experience is legal compliance. It helps maintain brand reputation and is foundational to earning the right to tell your story with your customers, your local legislators, and in your local community.

Non-compliance cases can hamper your reputation as an employer and even the reputation of other franchisees who operate under the McDonald's brand. Compliance with laws that apply to your business is also just good business sense, protecting against fines and other legal trouble.



**As you think about your approach to compliance for your organization, consider the following:**

- **Policies and Procedures.** Thoughtfully consider the policies and procedures that apply to your employees and work with your legal counsel to ensure those policies and procedures comply with all laws.
- **Education and Training.** It can be hard to enforce policies and practices if you don't explain them.
- **Stay Informed on the Law and Regularly Review Your Approach.** Labor and employment laws change frequently. Try to stay on top of evolving laws and regulations that affect your workplace and work with your legal counsel to regularly review your policies and practices. **Here** are some helpful ways to learn about and keep up with changing legislation.



# A Closer Look

## Links to applicable various federal laws, information, and resources.

- [Summary of Major Laws of the Department of Labor](#)
- [Office of Small and Disadvantaged Business Utilization](#)
- [Occupational Safety and Health Administration \(OSHA\)](#)
- [Office of Federal Contract Compliance Programs \(OFCCP\)](#)
- [Employee Benefits Security Administration \(EBSA\)](#)
- [Office of Labor-Management Standards \(OLMS\)](#)
- [Office of Workers' Compensation Programs \(OWCP\)](#)
- [Joint Employer Facts](#)
- [Office of Disability Employment Policy \(ODEP\)](#)
- [Equal Employment Opportunity Commission \(EEOC\)](#)
- [Internal Revenue Service \(IRS\)](#)
- [Small Business Administration \(SBA\)](#)
- [Social Security Administration \(SSA\)](#)
- [National Labor Relations Board \(NLRB\)](#)
- [USA.gov](#)

# A Closer Look

**Overviews of applicable state laws, information, and resources.**



- **Minimum Wage Laws in the States**  
An interactive map that shows the latest minimum wage rates and laws for the 50 states and U.S. territories.
- **State Labor Law Topics**  
A comparison of federal and state laws regarding the Family and Medical Leave Act (FMLA), a list of links to tables comparing various state laws relative to the Fair Labor Standards Act (FLSA), including minimum wage and overtime rules, and links to state labor associations.
- **State Labor Offices**  
A directory of all states and their labor office contact information.
- **State Laws and Resources**  
Useful state resources from several DOL agencies.
- **Legal Helpline: (877) 376-4100**  
Complimentary, confidential, prompt advice and answers to your employment questions.



07

# Appendix of Resources

# Pillar Leads

## People



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Chief Field People Officer  
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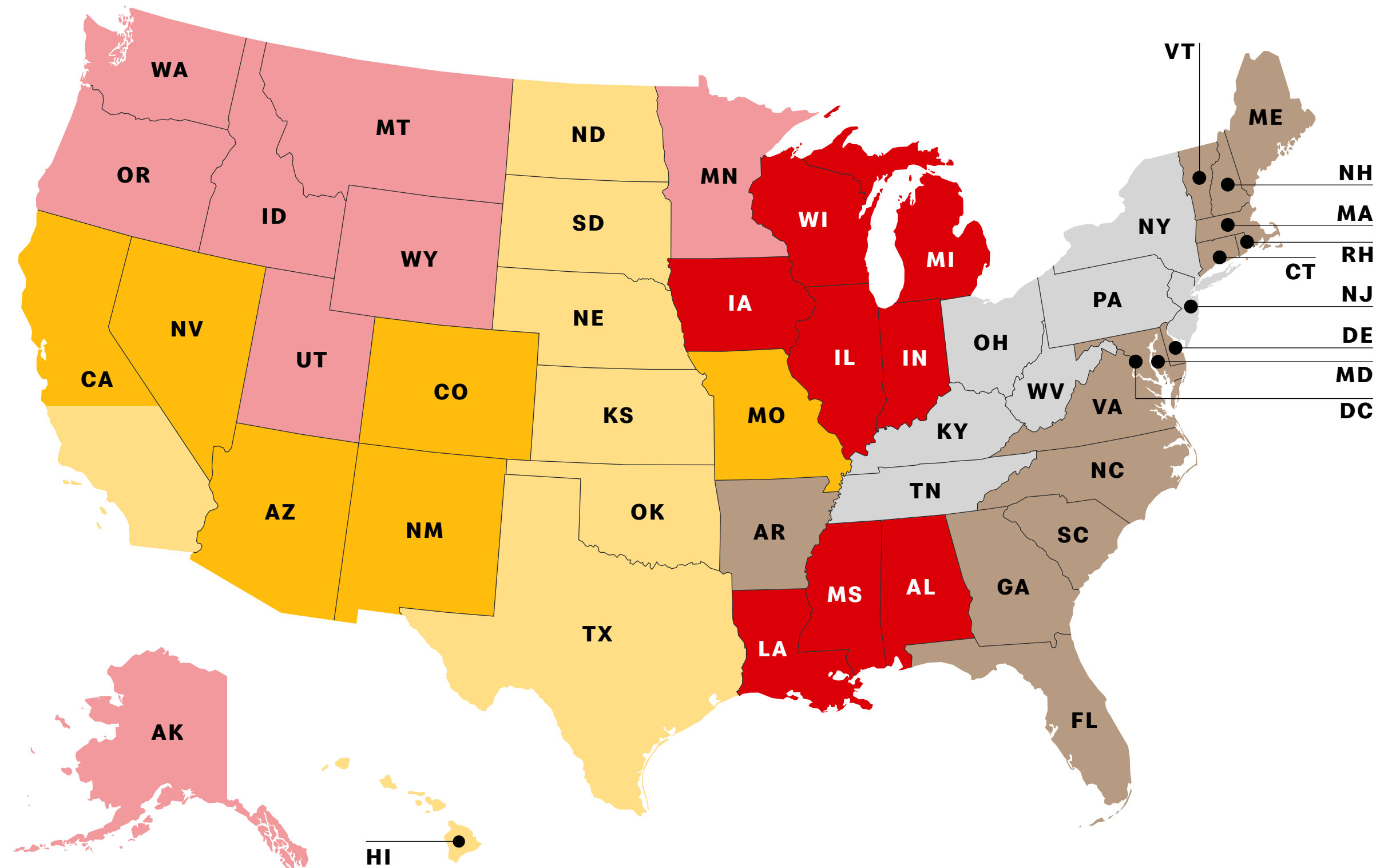
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# Resources by Pillar

## People

- Action Planning Guide [↗](#)
- Archways to Opportunity [↗](#)
- Community Partnerships Playbook [↗](#)
- Customizable EVP Poster [↗](#)
- EVP Hub [↗](#)
- Fix it Fast [↗](#)
- Learning Experience Modernization [↗](#)
- Listening Toolkit [↗](#)
- People Brand Standards [↗](#)
- Your Field People Managers [↗](#)

## Reputation

- 1 in 8 Campaign [↗](#)
- McFamily Moments [↗](#)
- Now Serving Platform [↗](#)
- Oxford Economics Reports [↗](#)
- Thank You Crew [↗](#)
- Your Field PR and Brand Communications Team [↗](#)

## Legislation

### PACs:

- Federal PAC [↗](#)
- New Yorkers for Local Businesses [↗](#)

### Themes to Emphasize:

- Oxford Economic Reports [↗](#)
- Community Outreach [↗](#)
- Food Quality [↗](#)

### Company Thought Leadership:

- Minimum Wage [↗](#)
- Demanding Better From Elected Officials [↗](#)
- Your U.S. Government Relations Team [↗](#)

## Legal

- Federal Resources [↗](#)
- State Resources [↗](#)



**Thank you**

