



## How to Conduct Pathways of Influence Research on Key Decision-Makers

### What are Pathways of Influence?

Decision-makers at every level are motivated by different things. The more we understand about their priorities, vulnerabilities, ambition, and the people and communities they serve, the better we will be able to tailor our messages and select effective messengers. We will be able to identify – and leverage – direct and indirect pathways that connect us and our campaign to the decision-maker.

Campaign strategy becomes more strategic when informed by up-front research into possible “pathways of influence” for key decision-makers. Nowadays, the publicly available information about these targets is plentiful from online sources like Google, government websites, campaign finance reports, media coverage, candidate statements, and more. Add to that some good old fashioned offline research (picking up the phone and chatting with friends and colleagues), and we can quickly learn a lot about a person – where they live, work, and play; the organizations they support and/or belong to; the profile of their constituency; what issues they care about; and, where they fit in the power structure. If we’re lucky, we may uncover direct connections they have to our policy issue. Or, we may find the decision maker has a connection to someone in our sphere of influence. In all cases, we are likely to uncover information that will help us customize our talking points and our approach to the decision maker for maximum impact by understanding who they are, what their history and interests are, who they know and care about, and what is important to him/her.

### Conducting Pathways of Influence Research

Pathways of Influence research can be in-depth or “lite”, depending upon the time and resources that are available for research. Even a little research can go a long way.

As you search through research sources, let hunches or interesting tidbits of information take you down different paths to pursue as they present themselves. In other words, don’t be rigid but be flexible, creative and inquisitive.

The key pieces of pathways research include:

- Biographical information – Where did he/she grow up? Where did he/she go to school? What jobs has he/she held? What are his/her volunteer commitments? What can you

learn about his/her family? Who are the individuals and what are the causes that are important to him/her?

- Social networks utilized – Many state level decision-makers have a presence on Facebook and Twitter and these are good sources for discovering where they have their closest connections (i.e. organizations, boards, local groups)
- Electoral information for those in an elected position – How long has he/she been in office? Were there difficult and close races? Who are the decision-maker's opponents? Who supports the decision-maker? What have been his/her campaign platforms? What have been the campaign vulnerabilities?
- Donor information- Most accessible and most helpful for state level lawmakers
- Bills authored/sponsored – This demonstrates the issues that are most important to the decision-maker. Are these issues your organization has worked on? What about your key partners? Are there any issues that are in some way connected to yours?
- Board membership – What boards does the decision-maker serve on? Who else is serving on these boards? In what types of organizations is the decision maker involved?
- Demographics and characteristics of district – Is there an organization, business, or other institution within the district that may be supportive of your issue? Is your policy issue of importance to the residents and/or employers of the district the decision-maker represents?
- Personal relationship/connection to your policy issue – Is there some experience from the decision maker's own life or that of a close family member or friend that gives him/her first-hand knowledge of and experience with your issue?
- Political allies – Who are the individuals who are influential with the decision maker?
- Political opponents - Is the decision-maker up for re-election? If so, who are his/her opponents and where do they stand on your issue? Is your issue something that might be relevant as a campaign issue?

### **Sources of Information:**

The sites below are all good starting points for your online research and will provide a great deal of background information. As previously stated, the key is to follow the information to wherever it leads, allowing yourself room to explore hunches and be inquisitive. However, be realistic about the time you have to conduct the research. This is not a Masters Level Thesis! The research can continue forever -- so given the limited amount of time available, it will be important to focus on the largest and clearest connections between your specific policy goal and the decision-maker. Whenever possible, talking to others on the ground, including friends

and colleagues, is a great source of information, especially information not available on websites and other key relationships.

Helpful online sources:

- State legislative websites;
- Campaign websites;
- Election commission websites for donor information;
- Local newspaper searches for decision-maker name;
- Wikipedia (both for the decision-maker and the district/major cities or towns); and
- Websites for any organization in which the decision-maker is involved

### **Turning information into power**

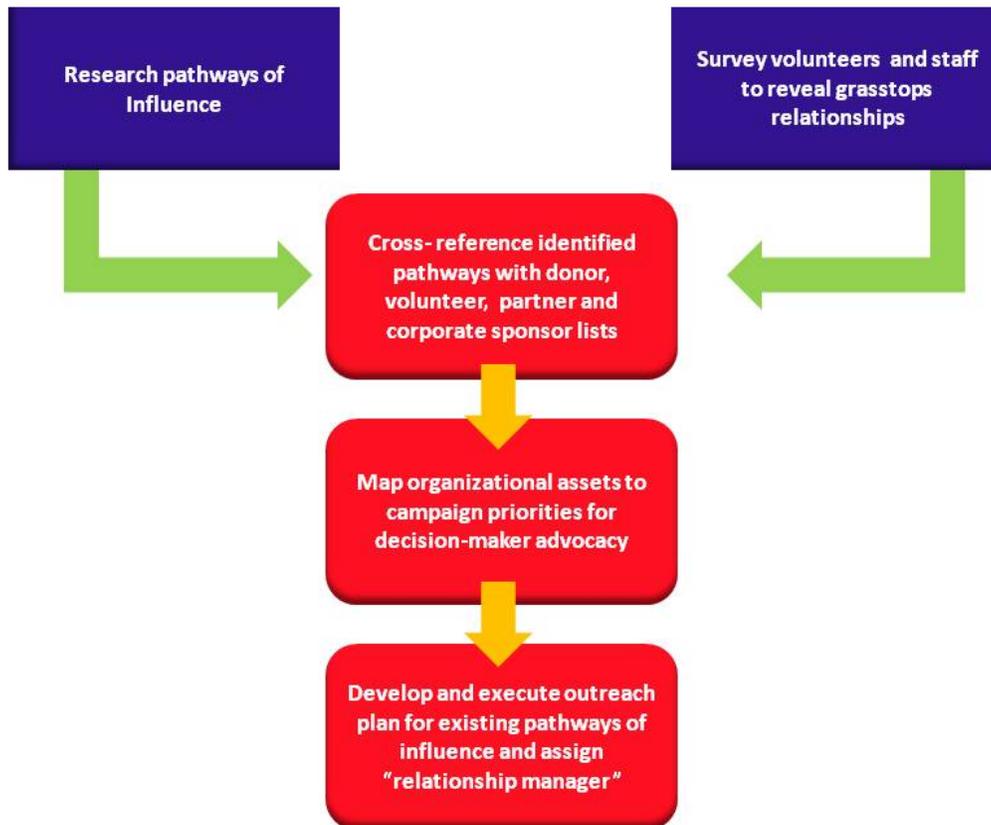
Once the pathways research is conducted, you should engage in some asset mapping to uncover existing resources that can be leveraged to influence the decision-makers. This process involves overlaying the findings from the pathways research with your organization (your staff, board members, donors, and volunteers) as well as your campaign (partner organizations, key supporters, endorsers, etc.) to see where there is overlap. Once you have identified these connection points, work to craft an action plan for leveraging those pathways of influence.

Example:

You have conducted Pathways of Influence research on Senator Susan Smith. When you do your asset mapping following the Pathways research process, you discover that one of your organization's Board members is a major donor to the Senator and has been for some time. You also learn that one of your senior managers sits on the Board of the local YMCA where the Senator also serves as a Board member. Last but not least, you learn that Senator Smith has been a lead champion on a piece of legislation that was a top priority of one of your partner organizations. These become promising pathways of influence, and you craft a plan for charging your Board member, the senior manager, and the partner organization with engaging Senator Smith around the campaign. These individuals become your main point of contact for the Senator and work to build a relationship with her and build her interest in and support for the campaign. Without the Pathways of Influence research, you would never have known that the Senator had these indirect – and powerful – connections to your campaign.

*This document may not be reproduced, distributed, or modified, in whole or in part, without written permission. Copyright © 2013 by Lori Fresina and Diane Pickles.*

## Decision-Maker Advocacy Process Flow



*This document may not be reproduced, distributed, or modified, in whole or in part, without written permission. Copyright © 2013 by Lori Fresina and Diane Pickles.*