

Pathways of Influence: Steps to turn a little bit of knowledge into a whole lotta power.

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Smoke-free worksite laws have swept the country during the last decade. By now, everybody knows secondhand smoke causes health problems. But truths and politics don't always work together, which is why a national nonprofit health organization approached our team at M+R in 2010.

The nonprofit was working with a coalition to pass a smoke-free worksite law in a large Southwestern state. The campaign had the rock-solid facts and national momentum on their side. They were well organized, sophisticated, and experienced. They had lobbying muscle and statehouse credibility. The lead organizations even had sizeable grassroots advocate lists and the ability to sort those supporters by legislative district. But the effort was stalling with elected officials year after year as Big Tobacco and its allies in the hospitality industry kept killing the bill.

We'd worked with this organization on multiple fronts over the years, and they were familiar with our approach to honing in on what makes decision-makers tick by doing highly targeted "Pathways of Influence" research. The nonprofit wanted our help figuring out how to influence decision-makers in the state to finally support smoke-free workplaces.

One tactic you can usually count on to move decision-makers is grasstops pressure. You know what we mean – getting individuals who have clout and credibility *in the eyes of the decision-maker* to whisper (or shout!) in their ear that your campaign goal is a good one.

So we set out to help the nonprofit and coalition turn a corner in their campaign by finding those grasstops pressure points and then using this new information to neutralize opponents and convert some undecided lawmakers into supporters.

Simple, right?

The thing is, unless you have the rolodex of Warren Buffett, your organization or coalition likely doesn't have endless power players on speed-dial. But you might have *indirect* access to powerful grassstops allies that you don't know you have—and won't know you have unless you do the research. You need to seek them out—and that's what we're going to discuss in this paper.

Winning campaigns is not just about who-you-know. First, it's about what-you-know.

(Before we dive in, we should say this: If you're wondering why we are not naming the organization or the state throughout this paper, it's because the fight is still underway, and the coalition wishes to keep their data-gathering tactics under the radar lest their legislative targets get the wrong idea! What we describe on the following pages was a stealthy exercise, and remains so to this day.)



Step 1: Know why pressure is powerful

Let's be honest: Advocates have a tendency to fixate on convincing decision-makers of the merits of their cause. We want them to know and embrace every factoid and talking point as though it was their own. We believe that – *if they only knew the facts* – they would surely give us what we want.

But the truth is that workplace secondhand smoke exposure is not a public health problem – it's a political problem. We have enough data on secondhand smoke to sink a battle ship and yet workplace smoking is still allowed in many states. The facts will never be enough to win the day.

Our job is to make it easier for decision-makers to give us what we want – and harder for them to ignore us. Ben Franklin said it best, *"If you would persuade, you must appeal to interest rather than intellect."*

Hard campaigns aren't won by persuasive arguments. Rather, they are won by applying a powerful set of pressure tactics that are based on the direct self-interest of the decision-maker. Our M+R Montana colleague CB Pearson lays these tactics out in a classic whitepaper – [Pressure vs Persuasion](#).

This is where our pathways of influence research comes in to help nonprofits pinpoint what or who is needed to pressure the decision-maker for the win.



Step 2: Know which decision-makers you need to pressure

Even though every campaign requires pressure on decision-makers, there isn't a universal formula for choosing which decision-makers to pressure. Sometimes it's all about who sits on which committee. Other times, you should also factor in who's up (or not up) for re-election soon.

In determining who your key decision-maker pressure targets are, don't limit your thinking by previous voting records, political affiliation, or prior opposition to your issue or similar campaigns. A decision-maker may have a terrible voting record on your issue, but perhaps no one had found their pathway to influence before.

In the case of the Southwestern coalition, they had tried – and failed – to pass statewide smoke-free worksite legislation in 2007 and 2009. They were gearing up for a battle in 2011, and had identified half-a-dozen lawmakers to consider for additional pressure. These decision-makers were selected early on for one of three reasons – 1) because they were not facing reelection battles in 2010; 2) they held key positions of power; 3) or they were strong opponents of the legislation.

Following the election, the list of targets grew to 14, some of whom were picked due to new relevant committee assignments. The final pathways roster also included the all-important final vote: the governor.



Step 3: Know what makes your decision-makers tick

Instead of obsessing about how to make our case through data, we obsessed about our decision-makers: What do they care about? Who are their supporters? Opponents? What is the power of their position? What is their ambition? Relative to our issue, what have they ever said, thought, voted, written, tweeted, or "liked"? What do their voters care about? Who are their donors? What organizations endorsed their campaigns? Who are their gate-keepers or key staff? What do their family members do? Where have they worked, lived, studied, volunteered, played, or prayed?



For the smoke-free campaign, we also needed to know a bit about each decision-maker's relationship to the issue. Have any of the communities in their district had a local campaign for smoke-free air? What was the outcome? How did the local papers editorialize on the issue? Who wrote letters-to-the-editor? How did they vote in the past on tobacco control issues? What is their connection to Big Tobacco and other opposition groups? What relationships did they have with "bad guy" lobbying firms?

The vast majority of information we collected during this stage was available through public sources. We've also been known to augment our online research with key informant interviews that tend to provide us with more off-the-record insight about the target and how to push his or her buttons more effectively. Sometimes those calls have been with lobbyists, other elected officials, and once with a reporter who covered the target.

Every decision-maker has a motivated self-interest. Becoming "decision-maker obsessed" helps us figure out the best messages (pressure points) and messengers (grasstops connections) to appeal to that self-interest.



Step 4: Know your connections

Once you have compiled that laundry list of possible pathways, your job is to cross-reference it with your organization's staff, members, donors and partners. Who do you already know in their world? Are any of their donors also your donors? Does their husband sit on a board of one of your partner organizations? Is one of your event sponsors in their district?

This process of asset-mapping almost always yields some common and previously unknown connections. Many of them surprising! In one state, for example, we researched a newly-elected U.S. Senator (the first Republican to be elected in that state for a very long time) and found that the Chair of the state's Republican Party also happened to be a long-time supporter and donor of our clients' organization...Who knew?! And like that, we had our Pathway of Influence.

With any and all pathways, the real challenge is in connecting the dots. Sure it's cool to have all of this intelligence on your decision-makers and it can make for some fun 'did you know?' conversations, but unless you really take the time to map your assets against those pathways, the reports are just a local version of *People Magazine*. You've got to take the time to cross-reference the target data with your own lists and then see where there are overlapping connections. Then, you have to get those connections to work for your campaign!

By the time our team had completed its Southwestern research, we had comprehensive reports on each of the 14 decision-makers and a mammoth spreadsheet of the possible Pathways of Influence that were identified. This Pathways spreadsheet was the basis for asset-mapping, with coalition partner organizations using it to cross-reference with their own databases (donor, volunteer, partner and corporate sponsors) to determine whether reliable connections already existed within the coalition.

Each of the 14 Pathways reports included the following:

- **Recommendations** – suggested the pathways to legislator that would be most likely to yield results for the campaign
- **Biographical Information** – included legislator's political history and legislative role, family history, information about spouses and children
- **Donor Profile** – contained public-access information about legislator's donors and donation amounts for recent campaigns
- **Bills Authored Electoral Information** – detailed election results for legislator

- **Connections to Business** – summarized legislator’s relationships with business and industry representatives (beyond the Big Tobacco realm)
- **Board Membership** – listed the boards that the legislator served on and the mission of these organizations
- **District Information and Smoke-Free Communities** – profiled the legislator’s district through census data and gave information on how smoke-free initiatives have been received by district communities

In addition, we created a companion piece to the Pathways reports that further explained key political donors, smoke-free supporters, and smoke-free opponents that had historically influenced the 14 legislators and could be expected to continue to have an impact throughout the campaign.

It was gratifying to hear from the coalition’s most seasoned lobbyists that the research had revealed some things they hadn’t known about important lawmakers. But it was more important when we got the results back from the coalition partners who had been mapping their own relationships against the target Pathways spreadsheet. There were lots of exciting leads for new pathways and after years of feeling stuck, the coalition had a new goal and renewed energy.



Step 5: Turn your knowledge into power

Even the smaller organizations in the Southwest coalition had Pathways connections and were assigned to make headway with specific decision-makers.

This exercise of assigning coalition liaisons to each key target can be a great equalizer within a coalition affording even the least resourced organizations the chance to come to the table with the big dogs.

Our advice to the coalition and to you is that you must work with your colleagues to find out who really “owns” each relationship with a particular volunteer, donor, or corporate sponsor, and make a plan to engage that pathway on behalf of the organization or campaign’s goals. This is not just a suggestion – it’s a commandment: Thou shall not approach a donor, board member, or volunteer unless thou has communicated clearly with the staff partner who currently manages that relationship and worked it out!

Armed with the Pathways information and individual assignments, the Southwestern coalition used the findings in four key ways:

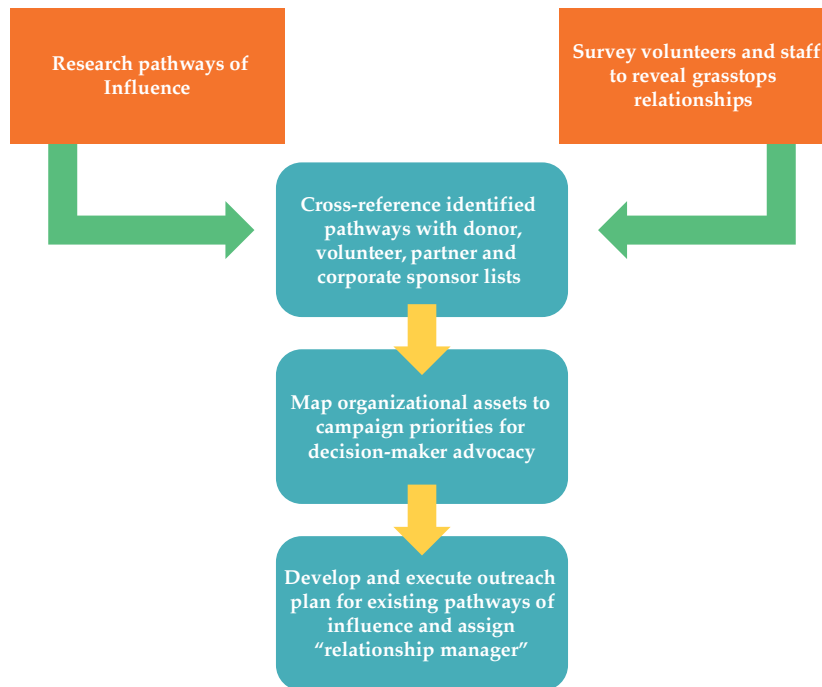
1. To identify contacts and gain support from Medical Society Boards in key districts
2. To engage members of Chamber of Commerce in key Representative's district
3. To establish key contacts across the state to engage in local coalitions and advocacy work
4. To provide field organizers with a playbook that named names of local people and organizations who might be readily engaged to advocate to their lawmaker in support of smoke-free worksites

We're still working on the happy smoke-free ending for our Southwestern state campaign, but the coalition has made progress, and attributes that progress in part to information and strategies they got from applying the Pathways of Influence approach. One key staffer for our client noted that the new information uncovered was "a true blessing for field directors in their daily work." Another coalition partner said that the District Information and Smoke-Free Communities section was instrumental in helping advocacy staff find the disconnect between a legislator's voting record and what his or her district supported.

Better still, the coalition credits the report with giving them the tools for converting one of their target lawmakers into a bill supporter within a year.

Winning difficult campaigns isn't easy, and it's often not quick. But when advocates are armed with strategic knowledge, their chances of success dramatically increase. While we can't promise the "smoke-free happily ever after" ending for our Southwestern state will come this year, we are confident that they will be added to the ranks of smoke-free workplace laws in the nation soon!

Decision-Maker Advocacy Process Flow



Want second helpings?

Another great way we've used this research is to help inform our field organizing strategy. We have a client that wanted to enlist a newly-elected female member of the U.S. Senate as one of its issue ambassadors. Their plan was to have M+R organize a breakfast event to unveil the initiative and ask her support.

The state she serves is constantly being wooed by national organizations, so we worried that the simple event approach might fall flat. So we took it upon ourselves to do our own Pathways of Influence report on the senator to learn more about the kinds of events she might like, who she listened to, what women in the state might also be credible issue ambassadors, and if the senator had any history with the particular issues.

In the end, we were able to recruit a first-class roster of women leaders from across the state to serve on a host committee for the event. It included the state's Speaker of the House, the Senate President, business leaders, and the future governor. The invitation list – informed by our Pathways research – included dozens of influential hard-working women from the state and that breakfast felt like the place to be.

And here's the kicker: We didn't even invite the senator to attend the event. We made that decision because our research told us that this lawmaker has a history of not committing early in campaigns. We knew that she might show up, smile and say nice things about

the campaign, but not make a clear endorsement. So instead, we invited a staffer to come and learn more about the campaign and see a room filled with high-powered women that mattered to her boss. After the event, a few of our newly recruited supporters wrote a joint letter to the senator urging her to join them as an ambassador for the cause. She did, and went on to play a leadership role for our client's organization and cause.

Maybe she would have done that anyway, but we're pretty sure that the research we did allowed us to assemble a leadership crew of women who made it both politically safe and compelling for her to sign on. It also taught us to tread lightly and try to win her favor with a more subtle approach than a direct appeal. And as a bonus, the organization gained several additional very powerful women who can now be tapped as allies when needed.

About M+R

M+R is dedicated to helping our clients advance their missions in order to bring about positive change. We do this by helping organizations and campaigns we believe in develop smart and effective strategies, hone their messages, mobilize their members, build grassroots support, raise money, and communicate effectively with the media, the public, and decision-makers, both online and offline.

We have offices across the country - in fact the Pathways of Influence concept was generated up in our New England office by our campaign advocacy experts Lori Fresina and Diane Pickles.

If you'd like more guidance and support from M+R as you find your organization's Pathways of Influence, please contact Lori Fresina at lfresina@mrss.com and visit www.mrss.com to learn more about us.

