

Pathways of Influence

Utilizing the Reports for Your Campaigns



American Heart Association | American Stroke Association®

life is why™

Pathways of Influence



- Better influencing decision makers through research.
 - Understand motivations
 - ◆ What are the priorities, beliefs and ambitions guiding the targeted lawmaker?
 - Understand constituency
 - ◆ Choose effective messages and the best messengers
- Opposition research combined with recommendations for possible connections = Pathways of Influence
- Turn legislators into supporters/champions, or neutralize opposition

Report Uses



- Informing specific issue campaigns;
- Allowing staff to more strategically deploy resources;
- Helping volunteers to become more familiar with decision-makers;
- Informing invitation lists for more powerful community meetings;
- Trouble-shooting possible sticking points with key decision-makers;
- Stimulating greater volunteer engagement by revealing new ways for volunteers to lead strategic relationship-building on behalf of our organization;
- Prioritizing prospective coalition partners by identifying those organizations that already have clout with key decision-makers;
- Connecting different parts of our organizations by uncovering shared connections, including shared donors; and
- Maximizing interactions with lawmakers.

3 Main Report Types



1. Pathways of Influence on a particular federal official
2. Pathways of Influence on a particular state/local official
3. Pathways of Influence on a particular region (city, county)
 - Identify potential partners or opponents
 - Table of Contents
 - ◆ Regional Demographics and Overview
 - ◆ Elected Officials
 - ◆ Largest Employers
 - ◆ Medical Facilities
 - ◆ Schools
 - ◆ Influential figures
 - ◆ Other

A Federal Example



- Senator Max Baucus- (D-MT) *120 pages*
- ...several companies which are top donors to Sen. Baucus and, therefore, offer potential pathways toward reaching him. Each of these companies are worthy of further exploration to identify any top level executives, board members, or physicians, who might have an affiliation with the AHA as a volunteer and/or donor.
- Are there any AHA volunteers who work at these companies?
- Do these companies donate to AHA?
- Do these companies participate in any AHA programs (Heart Walk, Go Red, or other AHA corporate campaigns)?

A Federal Example



- **General Electric (GE)** is a top donor to Sen. Baucus and GE Healthcare produces cardiology equipment.
 - GE partnered with the National Stroke Association in 2004 to create the Hip Hop Stroke Program for elementary school students. Also, the GE Hispanic Forum initiated —A Healthy You, A Healthy Me. to address childhood obesity in the Hispanic community.
- The **Mary Kay Holding Corporation** is a holding company of Mary Kay Cosmetics and a top donor.
 - Does AHA have any connections to the local Mary Kay company located in Glasgow?

(Links with each of these bullets in actual report)

A Federal Example



- **Native Americans**

- Senator Baucus has been supportive of Montana Native American around the issues of education, jobs and health care needs, yet mortality rates due to cardiovascular disease are up among this population and tobacco use remains high.
 - ◆ Can AHA identify a Native American leader(s) who would be willing to meet with the Senator to emphasize the need to support The AHA advocacy agenda, as well as efforts to lessen the burden of cardiovascular disease among Native Americans?

- **Fun Facts**

- Baucus was born Dec. 11, 1941, in Helena, Mont., the fifth-generation heir to a Montana ranching fortune. His great-grandfather, Henry Sieben, started the 125,000-acre Sieben ranch, featured in the film *A River Runs Through It*, and Sieben is in the Cowboy Hall of Fame.

- **Political Allies**

- Most often votes with Snowe (ME-R) and Tester (MT-D)

Source: http://www.opencongress.org/people/show/300005_Max_Baucus

The Mississippi Case Study



The Project:

- 5 Pathway Reports
 - Governor Phil Bryant
 - Lt Governor Tate Reeves
 - Speaker Philip Gunn
 - Representative Herb Frierson, House Appropriations Chair
 - Senator Buck Clark, Senate Appropriations Chair

The Mississippi Case Study



- To identify contacts and gain support from key business and economic groups, as well as additional health groups in key districts in order to gain funding for the Healthy Food Financing Initiative
- To engage members of business organizations, businesses, etc to mobilize grassroots
- To establish key contacts across the state to engage in local coalitions and advocacy work

The Mississippi Case Study



- Confidentiality
 - These reports were confidential and used strictly by the American Heart Association and The Partnership for a Healthier Mississippi and other strategic partners



Pathways of Influence

Mississippi Governor, Phil Bryant

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Personal Biography & Political Career

Born December 9, 1954 with the given name Dewey Phillip Bryant, the Mississippi Governor is known as "Phil." Mr. Bryant was born in Moorhead, Mississippi and raised in Sunflower County, Mississippi. His father, Dewey C. Bryant was a diesel mechanic and his mother, Estelle, raised her children at home.

Mr. Bryant received an associate's degree in criminal justice from Hinds Community College and then completed his bachelor's degree at the University of Southern Mississippi in 1977.

Bryant is an adjunct professor of government at Mississippi College and has collaborated on three published books: "21st Century Government - Digital Promise, Digital Reality"; "Leadership Secrets of Government Financial Officials", the



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Recommendations

Individuals to engage (or further engage)

J. Clay Hays, Jr., MD - Dr. Hays is a cardiologist at the Jackson Heart Clinic (which interestingly seems to only employ [white male physicians!](#)). No stranger to the American Heart Association (AHA), Dr. Hays was a governor's appointee to the Mississippi Tobacco Control Advisory Council where he also represents the AHA. In all likelihood, Hays is already engaged in HFFI advocacy, but if he is not, it would be great to get him involved - preferably in a visible position. Hays is a fellow in the American College of Cardiology and was Treasurer of the MS State Medical Association - a group that he has represented during Hill Visits in Washington, DC. Hays is presently one of three American Medical Association delegates from Mississippi. In 2010, Hays (or perhaps his father) made a \$500 contribution to Phil Bryant. In August 2013, Governor Bryant and Dr. Hays, together, were the kickoff speakers for the Governor's Health Care Economic Development Summit that had over 300 attendees. The Summit focused on the objectives of the Blueprint Mississippi Health Care: An Economic Driver report, and was co-hosted by the Mississippi Economic Council, Mississippi Economic Development Council and Mississippi State Medical Association. The excerpt below is from a September 2011 edition of the [Journal MSMA](#)



The Mississippi Case Study



What is included in the reports?

- Biography and Political Career
- Family Profiles
- Political Ideology
- Campaign Financing
- Other Contextual Data
- Social Media
- Recommendations from M+R
- References
- Campaign Contributions Spreadsheet
 - Donors
 - Connections and Affiliations

The Mississippi Case Study



Future Use of the Reports:

- To move key decision-makers into positions of support (pressure & influence)
- Kicking off, reinvigorating campaigns
- Gaining edge in combative campaigns
- Tailoring advocate recruitment plans
- Influencing regulatory campaigns
- Sharing internally
- Asset mapping
- Identifying volunteers in key districts

Asset Mapping



| Company/ Organization | First Name | Last Name | Possible Pathway to Rep. A | Possible Pathway to Senator B | Connection to AHA |
|--------------------------|---------------|--------------|----------------------------------|-------------------------------------|-------------------------|
| Rotary Club | Santa | Claus | X | X | Attended YTC meeting |
| County GOP Chair | Tooth | Fairy | X | | AHA volunteer |
| First Baptist Church | Easter | Bunny | X | X | On AHA's YTC email list |
| AHA | Cupid | Valentine | | X | AHA staffer |
| Chamber of Commerce | Jack | O'Lantern | X | | Heart Walk Donor |

Survey of Existing Assets



4. INTELLIGENCE-GATHERING 101 - What do you know about Senator Baucus? Are there reasons you think he might care about heart disease and/ or stroke? Can you suggest any ways the AHA might deepen its relationship with Senator Baucus?

*** 5. Tell us about your relationship to Senator Baucus - if any**

- Personal friend
- Acquaintance
- Donor
- Campaign volunteer
- Have met with him
- Know someone on his staff well
- Know a member of his family well
- None

Other (please specify)

Who Can Create Reports?



- M+R Strategic Services
- Organization Staff
- With the How-To Guide, Examples, and Training, these reports can be compiled by your active **Volunteers** or **Interns**

How To Create Reports



- **Be fluid** – the contents of the reports are not set in stone. No report is going to be the same, and the best information can be found when clues are followed. Follow your hunches and trust your gut – if the research seems to be leading you in a particular direction, follow it!
- **Get immersed in one report** and work on it from start to finish. M+R has found it is easier to create reports this way, rather than working on several reports at one time, which can be distracting and make it more difficult to follow up on important clues.

How To Create Reports



- **Identify the source of information.** For every fact or tidbit in the report, include a link to the webpage used so that those reading the report can easily go back to identify the source and to dig more deeply if they choose.
- **Go offline.** As helpful as online research is, when possible, those creating the report should talk to colleagues, friends and insiders on the ground that may be private sources of intelligence on the lawmakers.

Information Sources



- Biographical Information (State/Local Officials)
 - State websites for official biographical information
 - www.wikipedia.org – unofficial biographies
 - Legislator's campaign website if an election year
- Donor Profile
 - State campaign finance websites (often through Secretary of State)

Information Sources



Social Networks Utilized

- Facebook
 - ◆ note organizations and people that the legislator “likes”
- Twitter
- Youtube
- Flickr
- Blogs

Electoral Information

- www.wikipedia.org
- <http://ballotpedia.org/wiki/>

Information Sources



- Bills Authored (Related to Health)
 - State officials: State legislative website
- Board Membership
 - See biographical information for board membership listed in the official's biography
 - Check websites of major health facilities (hospitals, care centers) within district for board information
- Demographics and Characteristics of District
 - Official state and city websites
 - The latest Census data
 - District information on the legislator's official website
 - For health statistics: www.cdc.gov
 - www.wikipedia.org

Information Sources



Relationship to Heart Disease, Stroke, the AHA, and/or the specific policy issue (CPR, smoke-free, etc.)

- Their official biographies and a keyword search of press releases (“American Heart Association” “Stroke Association” “Heart disease” “cardiovascular disease”, etc):
www.senate.gov and www.house.gov
- The official city website
 - Official websites of the major health facilities (hospitals, care centers) within the district
 - ◆ Check their website for connections to the AHA and for their board membership and leadership teams, including top staff or the government relations official
- For previous connections to the AHA: www.americanheart.org
- Searches connected to health and the AHA in the legislator’s major district newspaper as well as a search engine

Information Sources



- Political Allies
 - If it is an election year, the legislator's campaign website and that of their opponent(s), particularly any lists of endorsements
 - Any websites of organizations which the legislator is on the board or mentions, including religious affiliations, chambers of commerce, nonprofits and local social groups
 - For federal officials, donations from PACs of other members
- Political Opponents
 - The legislator's election opponents
 - Critics who challenge the candidate in letters to the editor and other public spaces
- Other
 - Information on top staff (chief of staff, legislative director, etc)
 - Miscellaneous information that does not fit into the above categories but is important

Successfully Using the Report



- Commission reports for delivery before legislature is in session to maximize time for generating contact relationships
- Share with coalition partners (stress confidentiality)
 - Asset mapping as a team
 - Common survey tool
- Involve colleagues
- Reference often throughout the campaign and apply strategically

Resources



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

BY LORI FRESINA AND DIANE PICKLES, M+R STRATEGIC SERVICES

- <http://www.powerprism.org/Pathways-Of-Influence.pdf>

Power Prism: Research and Data Collection

- <http://www.powerprism.org/research-data-collection.htm>



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