



**CALIFORNIA TOBACCO  
ENDGAME CENTER FOR  
ORGANIZING AND ENGAGEMENT**

A project of the American Heart Association.

# Decision Maker Matrix Circles of Influence

*December 3, 2020*

Christian Vierra, Organizing and Engagement Manager | Kathy “Toki” Ko, Organizing and Engagement Manager  
Paul Kneprath, Project Director



# Hello!!



Please introduce  
yourself in chat box.



We may unmute attendees for Q&A  
*...please be mindful and mute yourself!*



Materials can be found after the  
webinar at [organizingtoendtobacco.org](https://organizingtoendtobacco.org)  
under Events or Resources and a  
recording will be posted on Partners.



# Tobacco Endgame Center for Organizing & Engagement

Serving the community organizing and engagement needs of California's tobacco control community.



## Technical Assistance

One-on-one/group consultation  
Coalition Development &  
Strategy  
Media Advocacy



## Resources

Organizing Toolkit  
Campaign Playbook  
Materials Translation  
Training



## Community Organizing & Engagement

Media Advocacy  
Affinity Calls  
Webinars



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**Technical Assistance:** [organizingtoendtobacco.com/SupportGateway](https://organizingtoendtobacco.com/SupportGateway)

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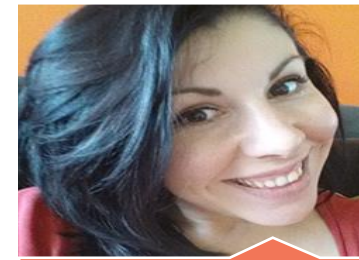
Email: [organizintoendtobacco@heart.org](mailto:organizintoendtobacco@heart.org)

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# Agenda

Learning Objectives

Beginning the Research and Assessment

Decision Maker Matrix Overview and Walk Through

Circles of Influence Overview and Walk Through

Questions and Answers

Survey!



# Learning Objectives



Understand the importance of researching your political environment prior to completing the Decision Maker Matrix and Circle of Influence.


Learn how to complete the Decision Maker Matrix and Circle of Influence.

Understand how the Decision Maker Matrix and Circle of Influence affects your Midwest Academy Strategy Chart.

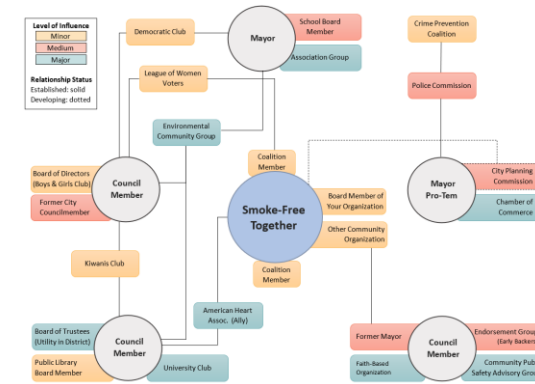




## Decision Maker Matrix (DMM)

Decision Maker	Policy Position	Research & Notes	Allies & Affiliations
<p>List everyone on the City Council</p> <p><b>Councilmember Lopez</b> District 3</p> 	<p>Yes: likely to support the issue</p> <p><b>Undecided:</b> the individual is undecided</p>	<p>List all the information you have about the decision makers. Include things like: vote record, family, education, interests, education, and community platform.</p> <p><b>Past Voting Record</b></p> <ul style="list-style-type: none"> <li>• Support: City Ord No 2010-15 Tobacco Tax</li> <li>• Support: Ord No 2008-15 prohibiting smoking in City parks</li> <li>• Support: Ord No 2010-18 taxing sugary sweetened beverages</li> <li>• Oppose: City Ord No 2013-18 permitting marijuana businesses</li> </ul> <p><b>Family Life</b></p> <ul style="list-style-type: none"> <li>• Spouse/Partner: Name, Graduated from a local University, Professor of Public Policy</li> <li>• Three children who attend local elementary and middle school</li> <li>• Both parents are involved with their local elementary PTA</li> </ul> <p><b>Occupation</b></p> <ul style="list-style-type: none"> <li>• CA State Legislature - worked for former Assemblymember 8 (ADP)</li> <li>• Community Services Commissioner, Appointed position (2004-2006)</li> </ul> <p><b>Interests</b></p> <ul style="list-style-type: none"> <li>• Regularly attends local non-denominational church</li> <li>• Volunteers for non-profits such as the American Heart Association</li> <li>• Aid cyclist</li> </ul> <p><b>Education</b></p> <p>Alumnus of local high school and local university with MA in Liberal Arts</p>	<p>List all the groups, individuals, or clubs your DMs are affiliated with. This will also help with recruitment strategy.</p> <p><b>Current Affiliations</b></p> <ul style="list-style-type: none"> <li>• Tropical Town Boys &amp; Girls Club</li> <li>• Knights Club</li> </ul> <p><b>Past Affiliations</b></p> <ul style="list-style-type: none"> <li>• Past board member of the Tropical Town YMCA</li> <li>• Past board member of Tropical Town Food Banks</li> <li>• Past member of the Friends of the Public Library</li> <li>• Founding member and Past-President of Community Active Living Society</li> </ul> <p><b>Political Allies</b></p> <ul style="list-style-type: none"> <li>• Councilmember Lee</li> <li>• County Supervisor Gonzales</li> <li>• Assemblymember Williams</li> </ul>
<p><b>Contact Information</b></p> <p>Councilmember Lopez at tropical.gov (city) <a href="mailto:lopez@cityoflr.org">lopez@cityoflr.org</a></p> <p><b>Term Dates</b></p> <p>09/2018 – 11/2022</p> <p><b>Running for another term?</b></p> <p>Yes</p>			
<p><b>Social Media</b></p> <p>Twitter: handle Instagram: handle Facebook: link LinkedIn</p>			
		<p><b>Campaign Platform</b></p> <p>"The future of our City demands that we invest in our infrastructure and our citizens, and one of the ways we need to do that is by attracting vibrant new businesses that generate sales that fix the needs of our community."</p> <p>Other Widely regarded as a political moderate.</p>	

A tool that determines how a coalition can use its network and relationships to connect with and influence a decision maker.



# Phases to Completing DMM and COI

## Phase 1: Research & Assessment

- Policy Record Review
- Media Activity Review
- Data Collecting Surveys
- Key Informant Interviews

## Phase 2 (Beginning): Strategy & Planning

- 1<sup>st</sup>: Decision Maker Matrix
- 2<sup>nd</sup>: Circles of Influence

## Phase 2 (End) Midwest Academy Strategy Chart








# Decision Maker Matrix

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Decision Maker	Policy Position	Research & Notes	Allies & Affiliations
<p>List everyone on the Decision-Making Body</p> <p>[Decision Maker Name] District #</p>  <p>Contact Information</p> <p>Term Dates</p> <p>Running for another term?</p> <p>Social Media</p>	<p>List all the information you have about the decision makers. Include things such as: vote record, family, occupation, interests, education, and campaign platform.</p> <p><b>Individual's likelihood of support.</b></p> <p><b>Yes:</b> likely to support the issue</p> <p><b>No:</b> likely to oppose the issue</p> <p><b>Undecided:</b> if the individual is undecided</p>	<p>Past Voting Record</p> <p>Family Life</p> <p>Occupation</p> <p>Interests</p> <p>Education</p> <p>Campaign Platform</p> <p>Other</p>	<p>List all the organizations, individuals, or clubs your decision maker are affiliated with. This will also help with recruitment strategy.</p> <p>Current Affiliations</p> <p>Past Affiliations</p> <p>Political Allies</p>



# Decision Maker

Councilmember,  
Supervisor, or Tribal Leader



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1

**Councilmember Lopez**

District 3



2

## Contact Information

CouncilmemberLopez@tropical.gov  
(210) 123-4567 ext. 21

3

## Term Dates

03/2018 – 11/2022

4

## Running for another term?

Yes

5

## Social Media

[Twitter handle](#)

[Instagram handle](#)

[Facebook link](#)

[LinkedIn](#)

## Decision Maker

*List everyone on the City Council*

# Policy Position

**To determine policy position, utilize:**

- Policy Record Review (PRR)
- Media Activity Review (MAR)
- Key Informant Interviews (KII's)

*How do you determine the decision maker's policy position on your tobacco issue?*

## Policy Position

*Individual's likelihood of support.*

**Yes:** likely to support the issue

**No:** likely to oppose the issue

**Undecided:** if the individual is undecided



# Research & Notes

- Past Voting Record
- Biographical Information & Other



Research & Notes
List all the information you have about the decision makers. Include things such as: vote record, family, occupation, interests, education, and campaign platform.
Past Voting Record
Family Life
Occupation
Interests
Education
Campaign Platform
Other

## Research & Notes

# Past Voting Record

- Utilize your Policy Record Review
- Note tobacco policy issues & other relevant health related policies



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1

### Research & Notes

*List all the information you have about the decision makers. Include things such as: vote record, family, occupation, interests, education, and campaign platform.*

#### Past Voting Record

- **Support:** City Ord No 2016-18 Tobacco TRL
- **Support:** City Ord No 2008-15 Prohibiting smoking in City parks
- **Support:** City Ord No 2010-08 Taxing sugary drinks
- **Oppose:** City Ord No 2013-18 Permitting cannabis businesses

#### Family Life

#### Occupation

#### Interests

#### Education

#### Campaign Platform

#### Other



## Research & Notes

# Biographical Information

- Family
- Occupation
- Interests
- Education
- Campaign Platform
- Other

1

### Past Voting Record

- **Support:** City Ord No 2016-18 Tobacco TRL
- **Support:** City Ord No 2008-15 prohibiting smoking in City parks
- **Support:** City Ord No 2010-08 taxing sugary sweetened beverages
- **Oppose:** City Ord No 013-18 permitting marijuana businesses

2

### Family Life

- Spouse/Partner: Name, Graduated of local University, Professor of Public Policy
- Three children who attend local elementary and middle school
- Both parents are involved with their local elementary PTA

3

### Occupation

- CA State Legislature - worked for former Assemblymember B (AD-##)
- Community Services Commissioner, Appointed position (2004–2006)

4

### Interests

- Regularly attends local non-denomination church
- Volunteers for non-profits such as the American Heart Association
- Avid cyclist

5

### Education

- Alumnae of local high school and local university with MA in Liberal Arts

6

### Campaign Platform

“The future of our City demands that we invest in our infrastructure and our citizens, and one of the ways we need to do that is by attracting vibrant new businesses that generate sales tax that fit the needs of our community.”

7

### Other

Widely regarded as a political moderate.

# Political Allies & Affiliations


**Affiliations:** Community-based organizations, groups, or clubs that the decision maker has been associated with or is a current member.

**Political Allies:** Organizations, notable individuals, or elected officials that have a common interest with the decision maker and have provided their political support.

Allies & Affiliations	
	<i>List all the groups, individuals, or clubs your DM's are affiliated with. This will also help with recruitment strategy.</i>
1	<b>Current Affiliations</b> <ul style="list-style-type: none"><li>• Tropical Town Boys &amp; Girls Club</li><li>• Kiwanis Club</li></ul>
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# Decision Maker Matrix:

## Councilmember Lopez

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<p><b>[Councilmember Lopez]</b> District 3</p>  <p><b>Contact Information</b> CouncilmemberLopez@tropical.gov (210) 123-4567 ext. 21</p> <p><b>Term Dates</b> 03/2018 – 11/2022</p> <p><b>Running for another term?</b> Yes</p> <p><b>Social Media</b>  <a href="#">Twitter handle</a>  <a href="#">Instagram handle</a>  <a href="#">Facebook link</a>  <a href="#">LinkedIn</a> </p>	Undecided	<p><b>Past Voting Record</b></p> <ul style="list-style-type: none"> <li>• <b>Support:</b> City Ord No 2016-18 Tobacco TRL</li> <li>• <b>Support:</b> City Ord No 2008-15 prohibiting smoking in City parks</li> <li>• <b>Support:</b> City Ord No 2010-08 taxing sugary sweetened beverages</li> <li>• <b>Oppose:</b> City Ord No 2013-18 permitting marijuana businesses</li> </ul> <p><b>Family Life</b></p> <ul style="list-style-type: none"> <li>• Spouse/Partner: Name, Graduated from a local University, Professor of Public Policy</li> <li>• Three children who attend local elementary and middle school</li> <li>• Both parents are involved with their local elementary PTA</li> </ul> <p><b>Occupation</b></p> <ul style="list-style-type: none"> <li>• CA State Legislature - worked for former Assemblymember B (AD-##)</li> <li>• Community Services Commissioner, Appointed position (2004–2006)</li> </ul> <p><b>Interests</b></p> <ul style="list-style-type: none"> <li>• Regularly attends local non-denomination church</li> <li>• Volunteers for non-profits such as the American Heart Association</li> <li>• Avid cyclist</li> </ul> <p><b>Education</b> Alumnae of local high school and local university with MA in Liberal Arts</p> <p><b>Campaign Platform</b> “The future of our City demands that we invest in our infrastructure and our citizens, and one of the ways we need to do that is by attracting vibrant new businesses that generate sales tax that fit the needs of our community.”</p> <p><b>Other</b> Widely regarded as a political moderate.</p>	<p><b>Current Affiliations</b></p> <ul style="list-style-type: none"> <li>• Tropical Town Boys &amp; Girls Club</li> <li>• American Heart Association</li> <li>• Kiwanis Club</li> </ul> <p><b>Past Affiliations</b></p> <ul style="list-style-type: none"> <li>• Past board member of the Tropical Town YMCA</li> <li>• Past board member of Tropical Town Food Banks</li> <li>• Past-President of the Friends of the Public Library</li> <li>• Founding member and Past-President of Community Active Living Society</li> </ul> <p><b>Political Allies</b></p> <ul style="list-style-type: none"> <li>• Councilmember Lee</li> <li>• County Supervisor Gonzalez</li> <li>• Assemblymember Williams</li> </ul>

# MASC: Decision Maker Column

Decision Maker	Position	Research/Details	Approach
Council Member Lopez	Undecided	<p><u>Electoral History</u></p> <ul style="list-style-type: none"><li>57% of the vote in the 2018 Election</li></ul> <p><u>Past voting record</u></p> <ul style="list-style-type: none"><li>Supported Tropical Town TRL</li><li>Supported smoking ban in city parks</li></ul> <p><u>Affiliations</u></p> <ul style="list-style-type: none"><li>Affiliated with Boys &amp; Girls Club</li><li>Affiliated with the AHA</li></ul> <p><u>Interests</u></p> <ul style="list-style-type: none"><li>Volunteers with community-based non-profits</li></ul> <p><u>Political Allies</u></p> <ul style="list-style-type: none"><li>Councilmember Lee, who supports the tobacco policy is a political ally of Councilmember Lopez</li></ul>	<p><u>Approach #1</u></p> <ul style="list-style-type: none"><li>Councilmember Lopez is affiliated with the Boys &amp; Girls Club. Coalition could work to gain Boys &amp; Girls as an ally to influence Councilmember Lopez and gain his support.</li></ul> <p><u>Approach #2</u></p> <ul style="list-style-type: none"><li>Utilize your relationship with Councilmember Lee to influence Councilmember Lopez</li></ul>





Take a breath



The background of the slide features a photograph of four people in a professional setting, possibly a meeting or networking event. The image is semi-transparent and overlaid with a complex network of white lines and dots, resembling a social media or professional network graph. The colors are warm, with a mix of orange, red, and blue tones. A solid orange rectangle is located in the top left corner.

***“Networking is not collecting contacts. Networking is about planting and nurturing relations”***

***Meaningful***


# Circles of Influence

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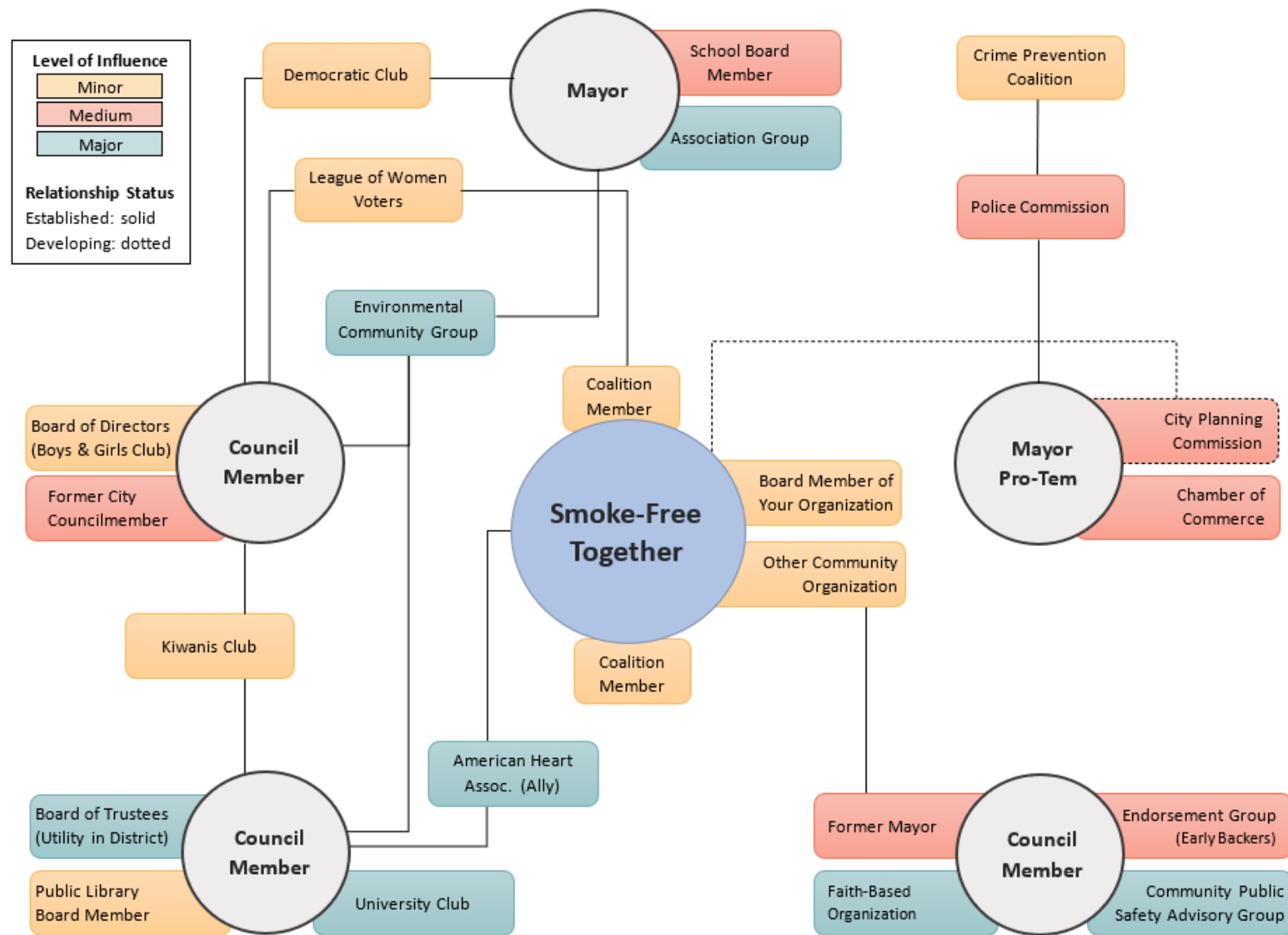


# Decision Maker Matrix:

## Councilmember Lopez

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# Circles of Influence



# Key Concepts



## Personal

Describes the relationships and connections a decision maker has with their community.



## Geographic Boundaries

Identify individuals that will be affected by the tobacco policy in their city/county borders.



## Policy Goals

Establish relationships with individuals that will help pass the tobacco policy and reach your goals.



# Level of Power

## Minor

Groups or individuals with **limited** or **no influence/power** with the decision makers.

## Medium

Groups or individuals with **resources** to organize and **invest effort** to **persuade** the decision maker to lean “yes”. They often have a relationship with decision makers.

## Major

Groups or individuals with an established relationship with decision makers and can **easily persuade** the decision maker to support your policies.



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# Defining Relationships

## Established Connections

Relationship between parties are established

**Solid**



## Developing Relationships

Relationship is developing or hasn't solidified just yet

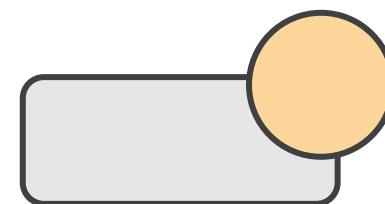
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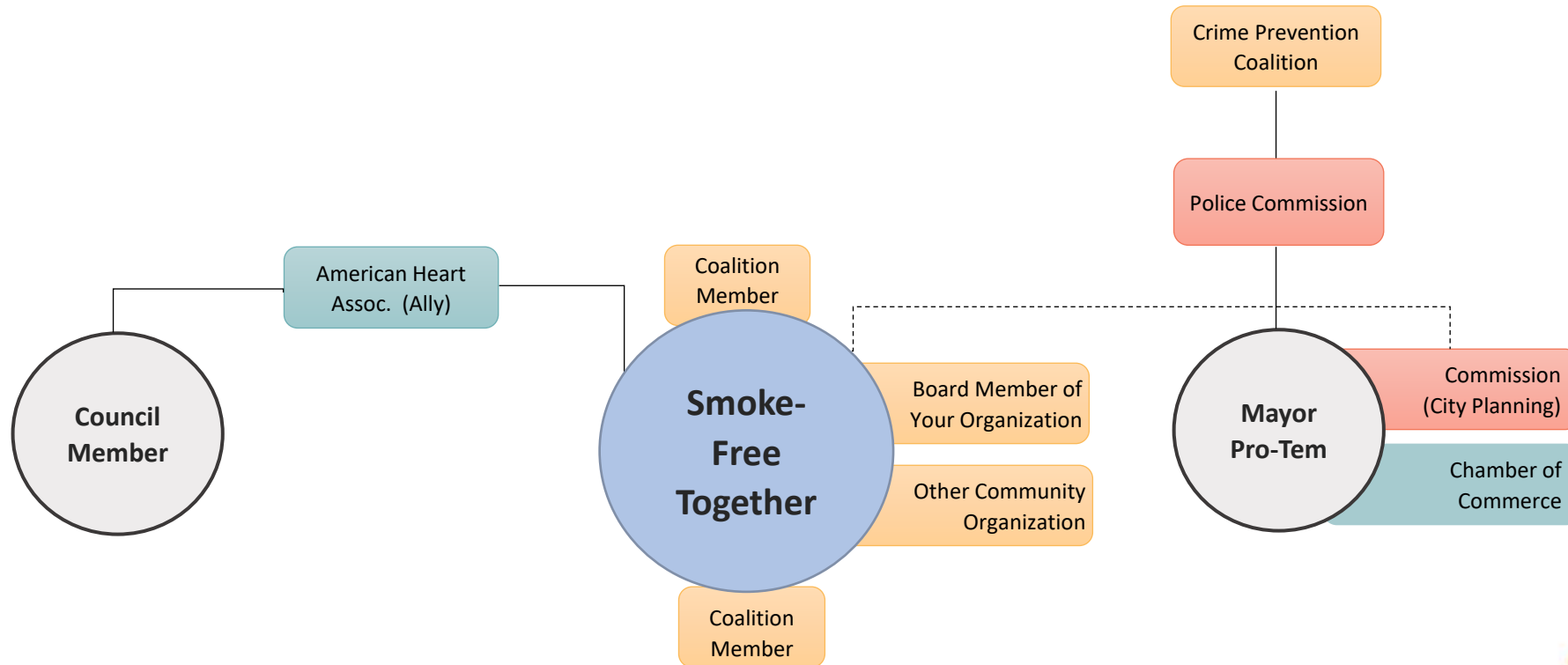
## Attached Relationships

Person or group is involved with one another

**Attached Placeholders**

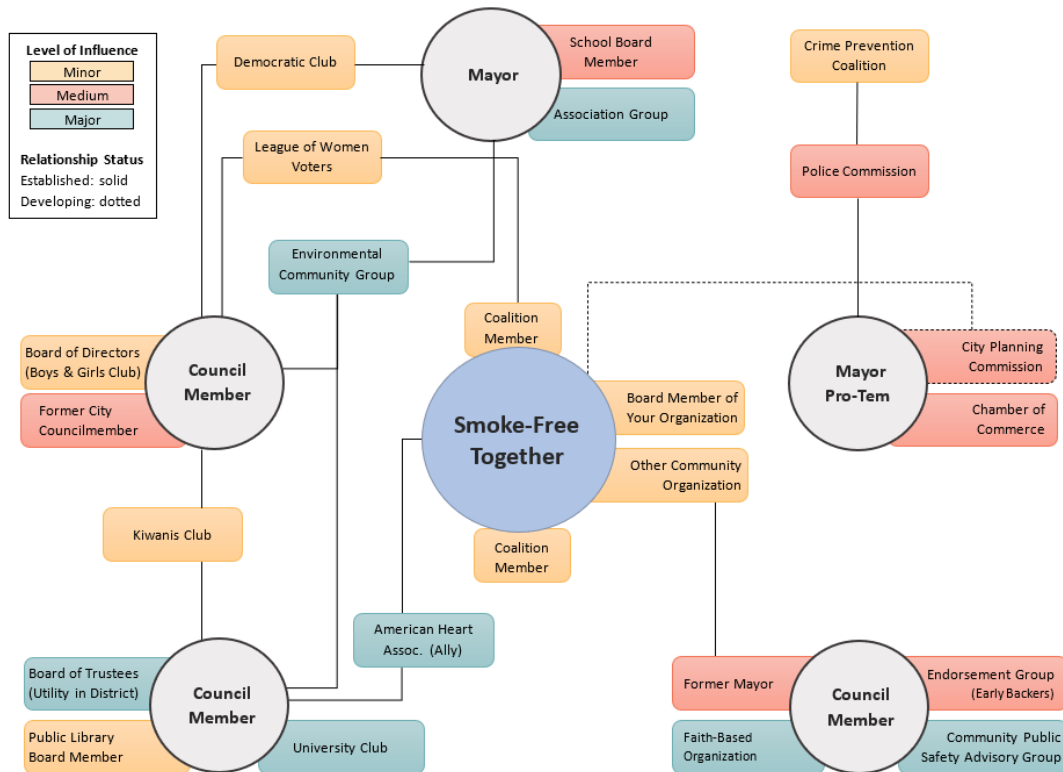


# Breaking Down the COI





# How the COI works with the MASC



Goals	Organizational Considerations
Goals are always concrete objectives to improve lives. They should be SMART (Specific, Measurable, Achievable, Relevant, and Time Bound).	Be specific and quantitative! How much, how many? Use Numbers.
<b>Long-Term Goal</b> What you ultimately want to accomplish.	<b>Current Organizational/Coalition Resources</b> What resources can you put in now? • Staff available • Time • Office space, technology, etc.) • Budget
<b>Intermediate Goal</b> What you are working on now.	<b>How will you sustain your organization?</b> • Number of members needed • Quality and diversity of members • Public recognition
<b>Short-Term Goal</b> A step toward the long-term goal.	<b>Internal Problems</b> How to resolve or reduce.

## Constituency People Power

Be specific. These are individuals and not institutions. List the name of the specific person in each organization.

### Who cares about the issue: **Constituents and Allies**

- Whose problem is it most directly?
- What do they gain if they win?
- Who else will be an ally on this issue?
- What power do they have over the decision maker (DM)?
- How are they organized, where can you find them?
- What risks are they taking?

### **Opponents**

- Can you neutralize and/or divide opponents?

Tactics and Tasks
<b>Tactics</b> are activities that directly engage a DM. <b>Tasks</b> are activities that support achieving a tactic. These are how you will show power to the DM so they will say yes to the goals.
<b>Show Power Directly to the DM</b> <ul style="list-style-type: none"> <li>• Letter/email writing</li> <li>• Petitions</li> <li>• Phone banking</li> <li>• Social media spotlight</li> <li>• 1 on 1 meetings with DM</li> <li>• Media events</li> <li>• Rallies</li> </ul>
<b>Public Education and Organization Building</b> <ul style="list-style-type: none"> <li>• Media events, etc.</li> <li>• Social media messages</li> <li>• Rallies/Banners</li> <li>• Townhall meetings</li> </ul>

# Tropical Town

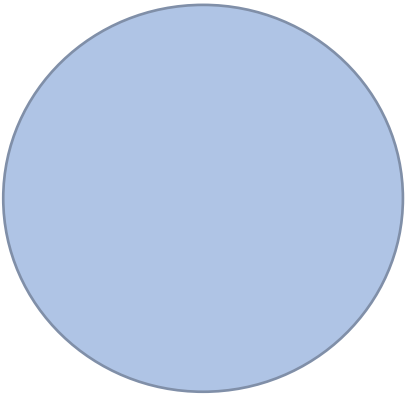
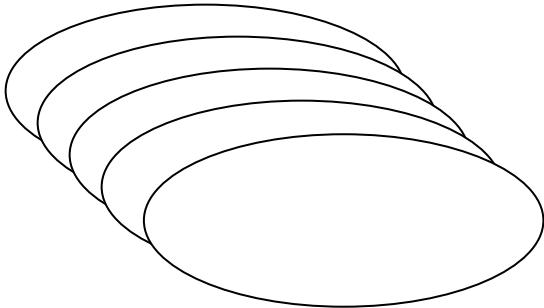
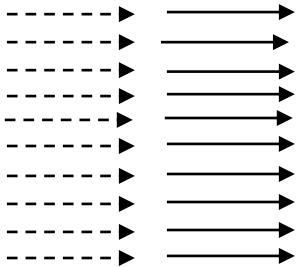
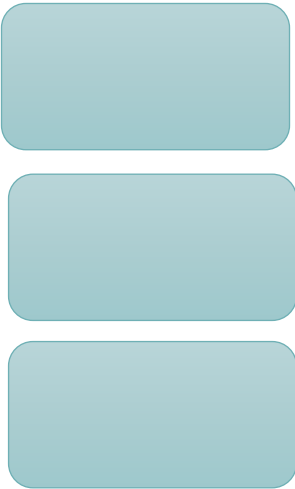
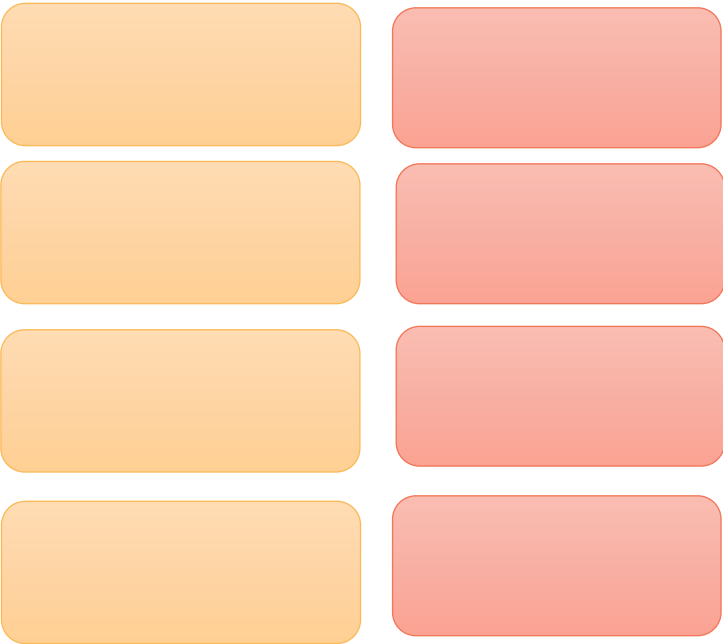
Your fictional community coalition, Bien Casa, has recently succeeded in passing a Tobacco Retail License (TRL) in the fictional City of Tropical Town and has begun looking for a new tobacco control issue. The City of Tropical Town is a predominantly working-class community, with 65% of the community identifying as Latinx.

The Bien Casa Coalition is currently supported by 3 full-time staff and 1 part-time staff of the Local Lead Agency. The coalition is led by two English only speaking co-chairs who have been in their positions for less than a year. The co-chairs are both community leaders who run local non-profits. The coalition has 15 coalition members, with 6 of those being traditional community organizations and 1 coalition member being non-traditional. There are no youth involved with Bien Casa. Coalition members include a PTA group from a local elementary school, The American Lung Association, and the Tropical Town Public Health Department. Additionally, although the American Heart Association is not a coalition member, they have a vested interest and have stated that they are an ally of the coalition.

The Tropical Town City Council is split on the ordinance, with the decisive vote belonging to Councilmember Lopez. Councilmember Lopez has lived in the district for 20 years and has strong ties to the community. He often attends church and is known for volunteering for non-profits such as the American Heart Association and various local non-profits that serve the needs of the community. Likewise, he is a former board member for his local YMCA.

In the 2016 General Election, Councilmember Lopez's top campaign supporters were the Tropical Town Teachers Union, the Tropical Town Chamber of Commerce, and the Tropical Town Apartment Association. Although he has courted support from unions, other than the Tropical Town Teachers Union, he has not secured their endorsements for his campaigns. He has also been endorsed by Councilmember Lee on the City Council who has previously committed to supporting the ordinance in the past.



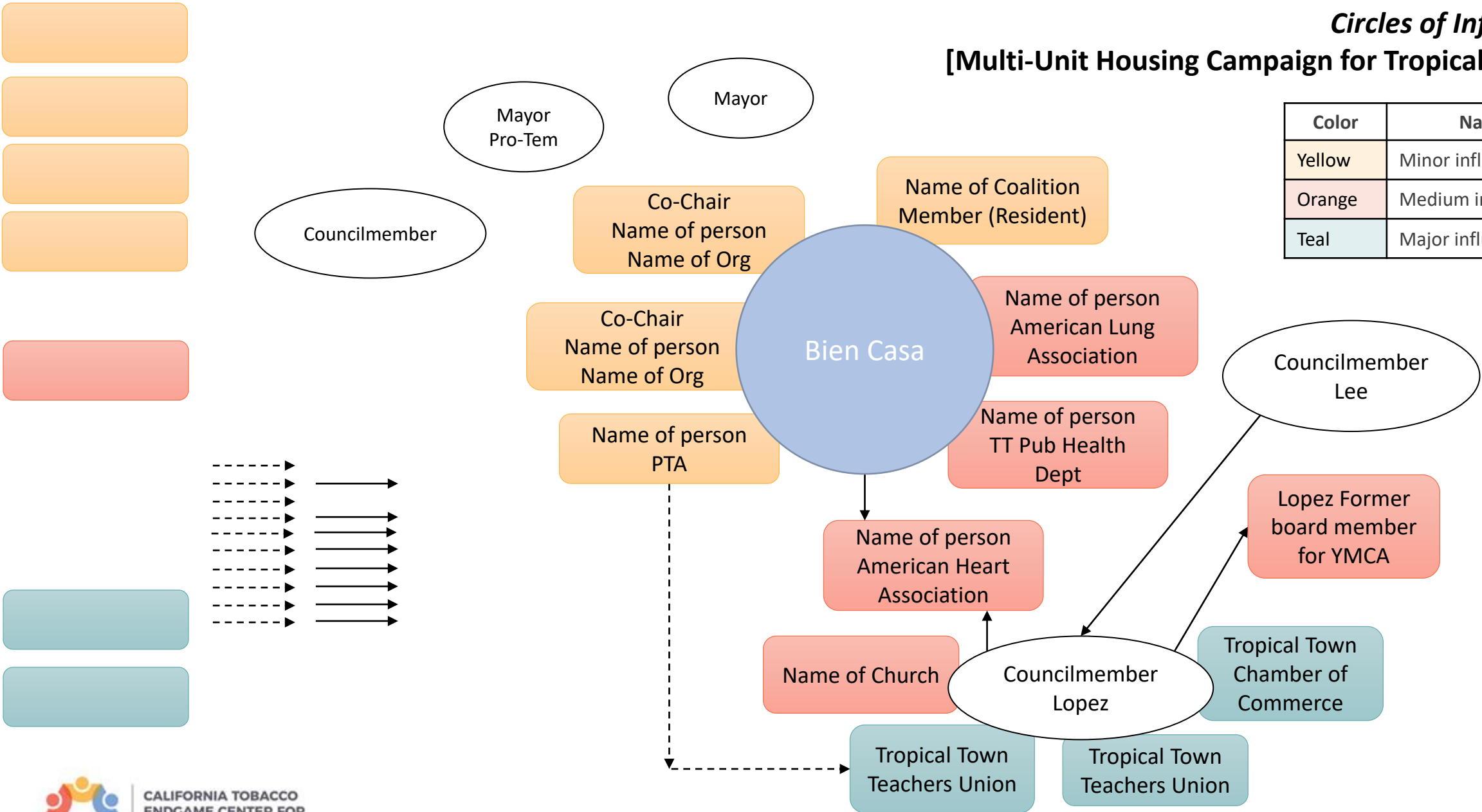


*Circles of Influence*  
[Multi-Unit Housing Campaign for Tropical Town]

Color	Name
Yellow	Minor influence
Orange	Medium influence
Teal	Major influence

***Circles of Influence***  
**[Multi-Unit Housing Campaign for Tropical Town]**

Color	Name
Yellow	Minor influence
Orange	Medium influence
Teal	Major influence



# Conclusion

## Thank you!

Understand the importance of researching your political environment prior to completing the Decision Maker Matrix and Circle of Influence.

Learn how to complete the Decision Maker Matrix and Circle of Influence.

Understanding how the Decision Maker Matrix and Circle of Influence affects your Midwest Academy Strategy Chart.



# Upcoming Events

## Affinity Call

December 10<sup>th</sup> @ 1:00 PM

Check Partners for registration link or email  
[organizingtoendtobacco@heart.org](mailto:organizingtoendtobacco@heart.org)

Technical Assistance Needed?

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for today's presentation! Link is in chat box.

[surveymonkey.com/r/EndgameCenterTraining](https://surveymonkey.com/r/EndgameCenterTraining)



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ENDGAME CENTER FOR  
ORGANIZING AND ENGAGEMENT  
A project of the American Heart Association.



A stylized sun graphic on the left side of the slide. It features a solid orange circle at the bottom left, with several short, curved orange lines above it, suggesting rays. The background is split: the top and left portions are orange, while the right portion is white.

We did it!

Questions & Answers