

A man and a woman are sitting at a table in a meeting, looking at a laptop screen. The man is on the left, wearing a plaid shirt, and the woman is on the right, wearing a light blue shirt and glasses. They are both looking intently at the screen. The background is a bright window with a view of a city. The image has a green tint.

Part Four

ORGANIZING TO BUILD POWER

CLIMATE FINANCE ACTION

A woman with long dark hair and glasses, wearing a white t-shirt, is standing in profile and pointing her right hand towards a wall. The wall is covered with numerous colorful sticky notes (yellow, pink, and orange) arranged in a grid-like pattern. The background is a plain, light-colored wall. The overall scene suggests a collaborative workspace or a meeting where ideas are being organized.

Organizing to Build Power

This section offers practical guidance for strategy & organizing to help get started in your engagement.



1

For Local Public Union Presidents and Member Leaders:

Power-mapping your pension system to your union's leaders and members

Behind every policy win or progress point are people, working together to make things happen!

That's why taking the time to research and chart out who and how you approach others is key to success. That range includes the person(s) you need to say "yes" to the change you want to see, people who influence those decision-makers, or people who share your goals and have contributions to bring to the table. This exercise is often called "power-" or "relationship-mapping". It helps you identify the levers and relationships you can activate to gain access and influence on the decision-makers you're trying to pressure/ persuade.

And this should feel very familiar! This exercise is similar to prep work in organizing a workplace or school board, where you map your workers, department relations, identify leaders, etc.-- just applied to your pension system.

It will help you know:

The best possible decision-makers to direct your energies toward.

What and who might persuade them to say "yes" to your request.

The pathways or relationships that can get you access to, or put pressure on, them.

Let's walk through the general basics of power mapping, then apply it to your pension system and union.



Finding the Right Decision Maker to Focus Your Energy On – and Learning What Makes Them Tick

To know who is the right person(s), ask yourself these questions:

- 1** *“What specifically needs to change to get at the “better” we’re looking for?” It should be something concrete and measurable (e.g., a specific rule, law, contract, pension policy, community agreement).*
- 2** *“Where can that change be made?” Think of a time-bound, specific place, such as the Pension Board, specific committees or departments in public administration, a committee or commission tasked with oversight, the legislature, or an elected official.*
- 3** *“Who can make that change happen?” Sometimes there are multiple decision-makers in play (policymakers, institutional leaders, corporate executives, agency leadership), so consider who has the most authority but is also vulnerable or movable in some way.*



For Local Public Union Presidents and Member Leaders

Before you reach out...

Before you can know how to reach out, you will need to learn what will influence the person(s)- get to know them! Here are a few questions to get your research started and shape key conversations that can help guide your relationship-building and relational organizing:

What are their top priorities right now and what is especially important to them-- and why? How does that connect to the changes needed that you are seeking?

What's their personal connection to the issue?

What's their track record (past statements or actions) on climate or climate risk?

What do they stand to win by saying "yes," or to lose by saying "no"? What has prevented them from saying "yes" so far, or gotten in their way of getting more active? How do they feel about that?

Who do you know on their staff or in their social networks?

Whose perspective, opinions, or support is especially important to them- and why? Or who influences them, both personally and professionally?

Which news sources praise them, and which are critical? What has been their reaction to this public attention so far?

Mapping Your Points of Connection and Relationships

Once you know more about what moves key decision-makers and influencers, it's time to see what shared connections or interests can boost greater access to them. Sometimes your best partners or allies might not be the most obvious. Take the time to have an open, creative brainstorm.

Even if they are not currently your allies, consider:

01 *What community groups, clubs, associations, places of worship, etc. does the decision-maker belong to, or personally matters to them?*

02 *Which businesses, donors, consumers, and media have a particular influence on them professionally?*

03 *Which constituents care about the issue? What communities, and community leaders, are most affected by it?*

04 *What do these groups or individuals bring in terms of credibility and access, direct personal experience, political influence, emotional appeal, special skills, and other connections or relationships?*

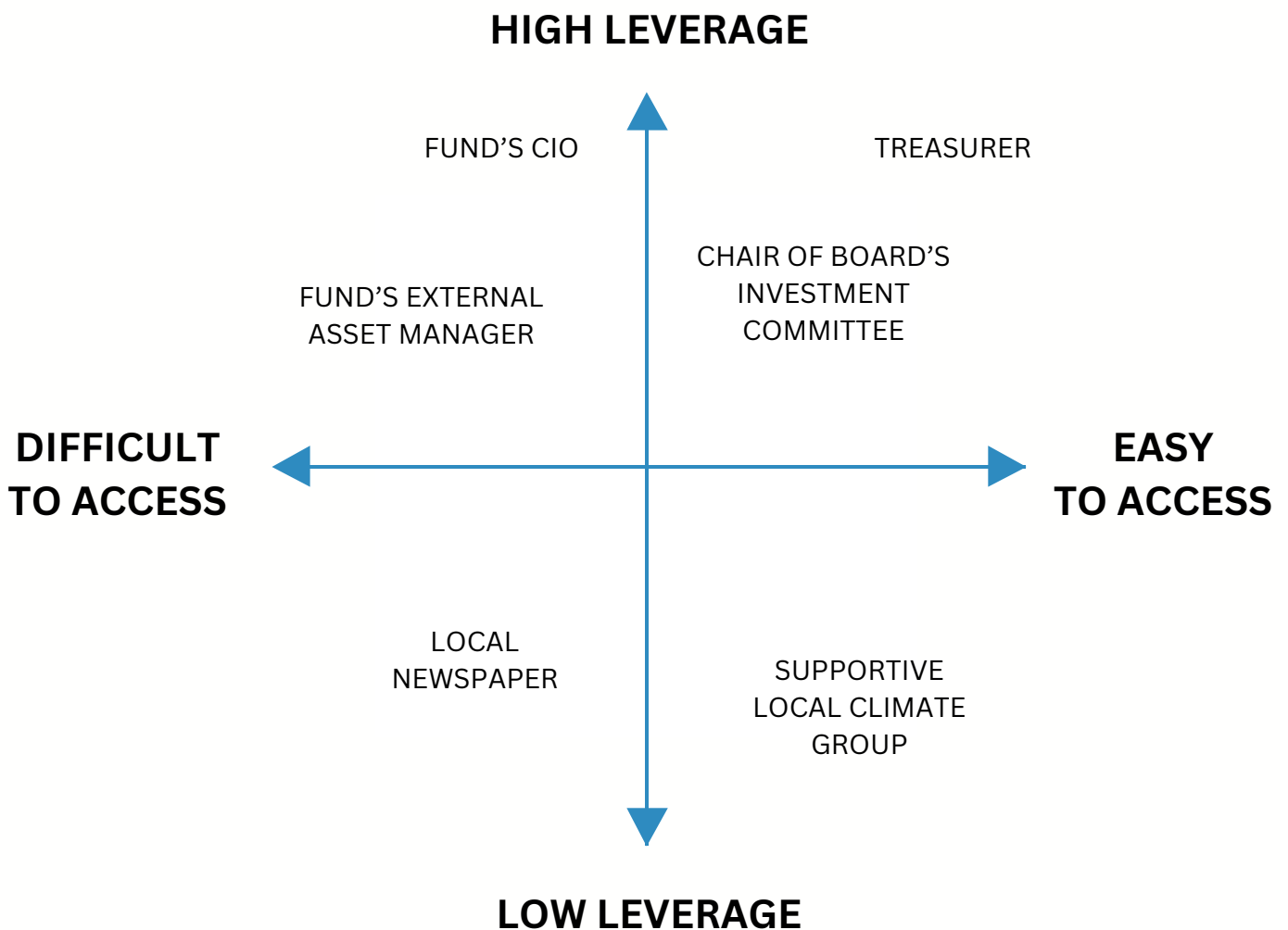
05 *And what connections or shared interests, values, or personal experiences do you have with them?*

Once you have it all out there, you can narrow down where is most important to focus in a few ways...

Quadrant Analysis

Putting the influencers into quadrants, with “low leverage” and “high leverage” along one axis and “difficult to access” and “easy to access” on the other. A reminder that “leverage” can be the conventional financial influence, personal influence, or powerful connections– but it also includes direct experience, unique knowledge on the issue, a powerful story, key communities’ trust, etc.

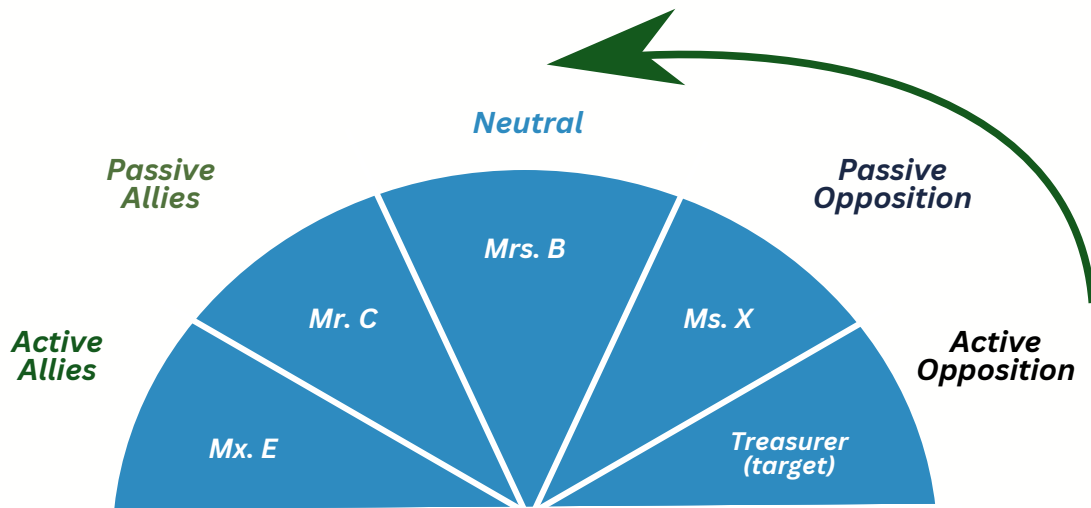
Also, consider who may not have a ton of conventional leverage but is important for your union's values and principles to have a real seat at the table. Below is a hypothetical example for reference. Each pension system has its own unique roles, relationships, and dynamics that can be assessed and leveraged appropriately to support organizing efforts.



Spectrum of Support

Place the influencers on the spectrum of support (From “active opposition -> passive opposition -> neutral-> passive allyship/ support-> active allyship/ support”) and note how “influential” they are.

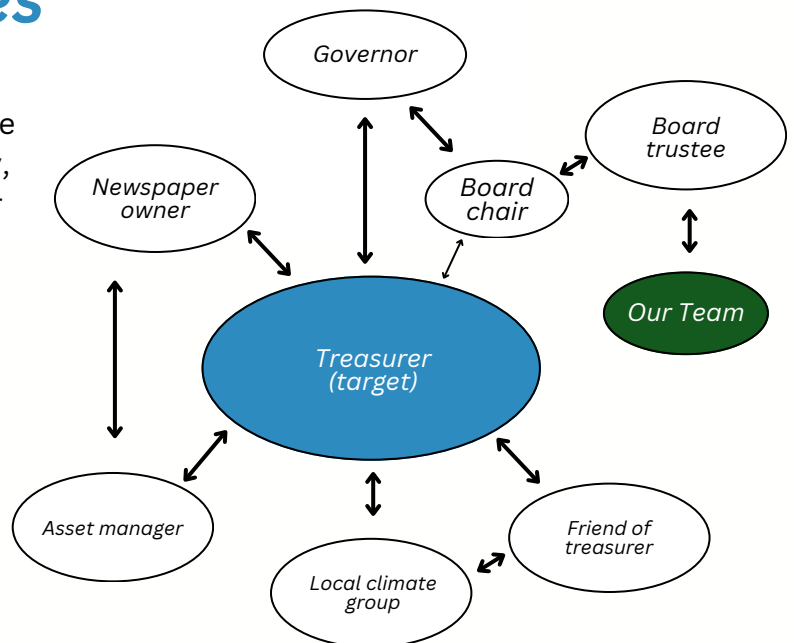
Those who are most influential and either willing to help or are moveable to support (or not “get in the way”) may be where to focus.



Relationship Circles

Map out how close or far your reach to the influencers are. That is: do you personally, your union’s leadership, members of your union, or close existing partners or allies have connections to the decision-makers or influencers?

This can be another prioritization factor.



As you approach the ally or influencer, consider what angle or aspect of the change-making goal would they be most interested in. And consider what you can offer them— expertise, additional capacity, support, connections, or resources for them to engage more easily. (It’s also important to be honest about what you can’t offer, so you don’t make promises you can’t keep.)

And remember the ultimate goal of building strategic relationships: encourage, persuade, or pressure your decision-makers to say “yes” and help move the dial.

Timing in your approach is also key. Consider:

- When this issue first comes up for the pension board and decision-makers
- When the decision would be made (see the Timeline section of the toolkit [LINK])
- Times of the year when your union’s leadership and/or membership will have more bandwidth for engagement— or when local unions come together to explore topics of collaboration
- Times of the year when the impacts are most obvious— both in terms of the dangers of climate change (like extreme heat or hurricane seasons) and in terms of when families consider financial planning (like tax season)

Considering the Array of Policy Goals

Remember: There are many “tools in your toolbox” for the kinds of policy changes your pension system can implement to better address climate risk! Visit other toolkit sections, such as *Menu for Change: 10 policy paths pensions can take to tackle climate risk, Know Your Shareholder Power, The Power of Investment Decisions*, and worksheets to help you: explore what concrete changes are possible, gauge how effective your current policies are, and what would be most impactful and viable for your fund.

Especially in the beginning, it’s beneficial to be iterative. You may have a stronger, more feasible goal by:

- Learning from what similar pension funds have successfully done.
- Talking with decision-makers and influencers about the range to assess moveability.
- Exploring interest in advocacy among allies.
- Chatting with other experienced stakeholders in this space to learn from their lessons.

2

For Trustees:

Charting Out Your Approach & Mapping Your Board and Influencers

As the group with a key voice in the boardroom– and with the duty to protect the long-term health of the pension fund– trustees could have a lot of power in shaping your pension’s investment decisions and policies on climate risk and retirement security. Throughout the guide, you will find a range of improvements you can help raise with the board.

To start thinking about the possibilities, here are six common improvements trustees have shaped in pension funds:

Asset manager directive, and how the pensions pick and evaluate asset managers

Proxy voting strategy with key companies

Recognizing climate change as a systemic risk in guiding policies

Setting climate risk as a factor in asset allocation strategy

A portfolio transition action plan that moves away from high-risk, high-emitting companies

Models and analyses used in risk assessment, to ensure climate risks are appropriately addressed

There are many places to speak up! Common venues trustees elevate the issue and shape decisions:

- Board strategy retreats
- Setting agenda for audit/investment committee
- Ahead of hiring staff or consultants
- During asset performance review
- During feedback collection on various reports

It all starts with asking the hard-but-important questions:

01 *How frequently and when does the fund review policies?*

02 *Do our policies acknowledge the systemic risk that climate change poses to our investments?*

03 *How are our asset managers voting on climate change-related proposals? Is this information disclosed transparently?*

04 *What criteria are we using when we select the staff and/or consultants managing our asset allocations and proxy voting? And who has a say in that?*

05 *And to yourself-- What is your biggest wish for how you'd want to see your pension board improve how it tackles climate risk and holds companies accountable?*

Trustees have a unique role to play in advancing meaningful policies and practices that limit climate risk to the long-term security of the retirement fund...

But a trustee alone can only do so much.



10 QUESTIONS TO BETTER UNDERSTAND AND ENGAGE WITH YOUR PEERS

1

What's the track record of each board member on this issue so far?

2

What's the track record of each board member on this issue so far?

3

What community and/or perspective are they representing on the board?

4

What community and/or perspective are they representing on the board?

5

What issues have they expressed interest or concern about? What links to climate risk?

6

Do they personal experiences with the impact of climate change, high-risk investing, and/or retirement insecurity?

7

Who has a direct influence on them? Whose support do they need or advice do they turn to?

8

Are there connections you have to them directly, or to people who have worked with them on professional, political, or policy achievements?

9

Have you collaborated or had shared goals in the past? Is there any connection between that and climate risk/ long-term fund security?

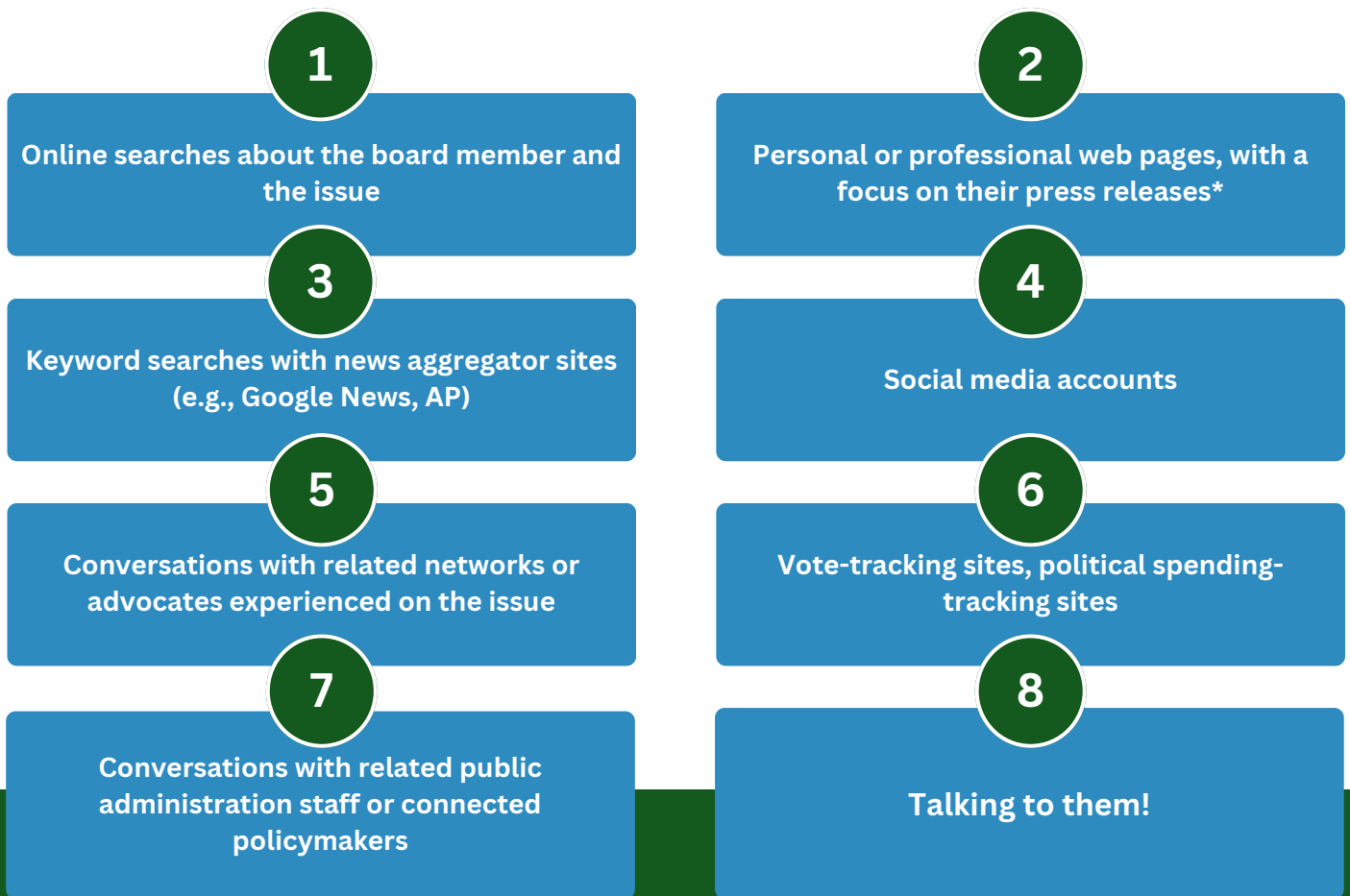
10

Do they have any history or connections to communities most affected by and/or engaged with the climate risk?

The points of connection may not always be obvious. Be open to a range of possibilities: beneficiary groups, public employment workplaces struggling with worker tenure and climate-related workforce safety, communities most impacted by the climate crisis, businesses hurting from climate change or climate risk, asset managers or external financial consultants concerned with climate risk, etc.

THERE ARE MANY WAYS TO FIND ANSWERS TO YOUR QUESTIONS.

COMMON RESEARCH MODES:



**This is more common for the policymakers or elected officials among the group, but may also apply to sites the person is well-connected to, such as a business, union, faith institution, or community group.*

This research and mapping can be useful to develop a strategy of engagement, by learning:

- Perceptions on climate risk, and the degree of interest and viability for investment policy improvements among the board from initial conversations
- Who would be willing to push for change with you
- What encouragement, pressure, or backing do folks need to join you
- Strength of your direct connections to the pension staff, board, and trustees– as well as relationships within the board to the unions you represent

3

For trustees and local unions:

“Strengths, Weaknesses, Opportunities, Threats (SWOT)” analysis to explore pathways to change making

Before diving into engagement, it’s helpful to have a solid understanding of the landscape you’re wading through. One way to do this is to have a **Strengths, Weaknesses, Opportunities, and Threats (aka “SWOT”) brainstorm** with your teammates to chart out all the factors at play. This is a way to “power map” yourself in context.

How to do this exercise:

- On a whiteboard or big sheets of paper, chart out the following four quadrants and give folks time to fill them in with their ideas:
 - 1 Strengths/ What unique power, advantages, or resources do you bring to the table? Consider energy for engagement, skills, knowledge, perspective, connections, political or personal influence, public attention or pressure, etc.
 - 2 Weaknesses/ What are your honest limitations or barriers? What could you envision would be helpful that you’re simply not equipped to contribute or take on?
 - 3 Opportunities/ What is happening in the world (or within your group or institution) that can help you gain attention, access, or influence for your goals? Consider politically, policy-wise, in relevant communities’ lives. Are there specific times these will happen?
 - 4 Threats/ What is happening in the world (or within your group or institution) that can be a barrier, opposition, or detraction from your goals? Are there specific times these will happen?
- Let folks take a look add what people added and either ask questions for shared clarity or add new ideas that are sparked.
- Discuss reflections people have about what approaches the group wants to take in light of this landscape analysis. Specific relationships to build, activities or tactics to pursue, times to engage, ways you or your group needs to grow its capability, or collaborations needed to build collective influence and power?
- Wrap with naming the next steps needed for integrating these new realizations and ideas into your outreach or organizing plans.

4 For trustees, local unions, and their members: *Building a story that builds power*

What's in a powerful story? *It ignites connection, motivation, and action.*
Three contributions a powerful story can offer:

- 1 Raise awareness and resonance**– evokes emotional connection and sense of urgency; has memorability and spreadability
- 2 Encourage action**– helps people see themselves and their values in the solution; make them feel a better way is possible and see how they can play a role in it;
- 3 Build relationships**– reveals connections between your group and other advocates' based on shared personal experiences or values; foster affinity or influence to decision-makers or influencers based on shared values, hopes, or experiences

FOUR C'S OF AN EFFECTIVE STORY

Compelling– is clear about who you are trying to reach, meets them where they are, covers the “why” of what you’re engaging in, evokes emotion and possibility, is memorable or “sticky”

Clear– includes a straightforward description of why this issue is important, keeps to the most essential points, and ensures all language used is accessible

Credible– offers real-world examples and evidence that show the stakes of the problem and what's to gain with the solution

Concrete– includes specific policy or decision you want to see happen, and the concrete action(s) you want the listeners to take

PAY ATTENTION TO WHO YOU'RE TRYING TO CONNECT WITH

For crafting a compelling story, it's just as important to listen and understand where your listener(s) are coming from as what you say. Ask yourself the following three questions as you craft your message:

What common experiences, interests, or worries might the listener(s) have concerning the problem or solutions you're discussing?

Are there any previous wins they've had, efforts they work on, or stated values that connect to what you're covering?

Before sharing your story (or throughout), are there points of authentic connection and shared interest?



Photo Credit: [Amy Hirschi](#)

Two Examples of Audience-Tailored Considerations:

WITH PUBLIC LABOR—

- What does “climate risk” really mean in terms of real-world harm to them? What they have faced during the recent season— wildfires, heat, floods, etc.— and what worries them the most about that? (Examples: workplace safety, job insecurity amid economic woes due to climate change, harm to people’s homes and communities due to extreme weather, billions of dollars in climate-related disasters, and financial risks to people’s pension funds due to unstable investments.)
- What are the concrete, viable solutions related to your pension fund that can better tackle the climate crisis while better-protecting retirement savings?
- What could they envision improves if the change is made? What happens in their day-to-day life for them and the communities they care about? Are there success stories to showcase how this is possible?
- Why now is the necessary and opportune time to act? And how can they help make that possible? (This is the place to share concrete actions they can take, and resources & support if they get involved.)

WITH PENSION STAFF OR PUBLIC OFFICIAL DECISION-MAKER—

- Talk about the importance of a strong pension fund, local economy, and resilience from climate-related disasters as a key trifecta for the stability and well-being of the state—and pension fund they are responsible for. Ask where they see concerns.
- Share examples of financial consequences to a pension’s long-term success when it ignores climate risk. And the benefits of strong investment policy and governance. Where do they see these?
- Share your ideas about viable solutions they can take up to strengthen the fund’s health. What do they think about those? Are there other possible solutions? Are there success stories to showcase how this is possible?
- What could they envision improves if the change is made? What happens in for their professional impact, and for the communities they are a part of or accountable to?
- Why now is the necessary and opportune time to act? What’s the next step?

You’ll see that the story doesn’t end on what’s wrong. While it’s important to highlight the very real stakes of the problem, focusing mostly on what you’re against instead of what you’re for often leads to feeling deflated and overwhelmed. The goal is to ignite the belief that a better outcome is possible, feeling motivated & capable to take action!

ORGANIZING TO BUILD POWER

Key Takeaways:

- Better understanding the fund’s decision-makers, influencers, and key stakeholders is critical for carving a path toward meaningful progress. See our sample questions, research guidance, and worksheets to support you.
- Since relationships are key to building power for positive change, mapping and better understanding your connections and shared interests with other voices in the pension space can unlock tremendous potential for collaboration or coordination.
- For trustees, taking the time to identify the places, people, conversations, and critical prompts can open the door for bolder actions and protections for the fund's health from the climate crises. See the mapping guidance, sample questions, and tips for finding decision-shaping spaces to help spark opportunities for change.
- Taking the time to build and share a story that builds connection, action, and power is crucial to success. Use some of our prompts to help craft a compelling story for your change-making goals that meet people where they are.



Thank you for exploring Organizing to Build Power, Part Four of **Investing in Our Future: A Guide for Climate-Conscious Pension Strategies**.

What to do Next:

CONTINUE LEARNING:

Part Five: Tips for Combating Disinformation

BOOK A CONSULTATION:

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Climate Finance Action (CFA) is a women-led, 501(C)3 non-profit organization equipping stakeholders and decision-makers to leverage the transformative power of publicly-held capital for real-world climate solutions to ensure a just transition to an inclusive economy in favor of people and the planet.