

# WASHINGTON INSIGHTS REVIEW

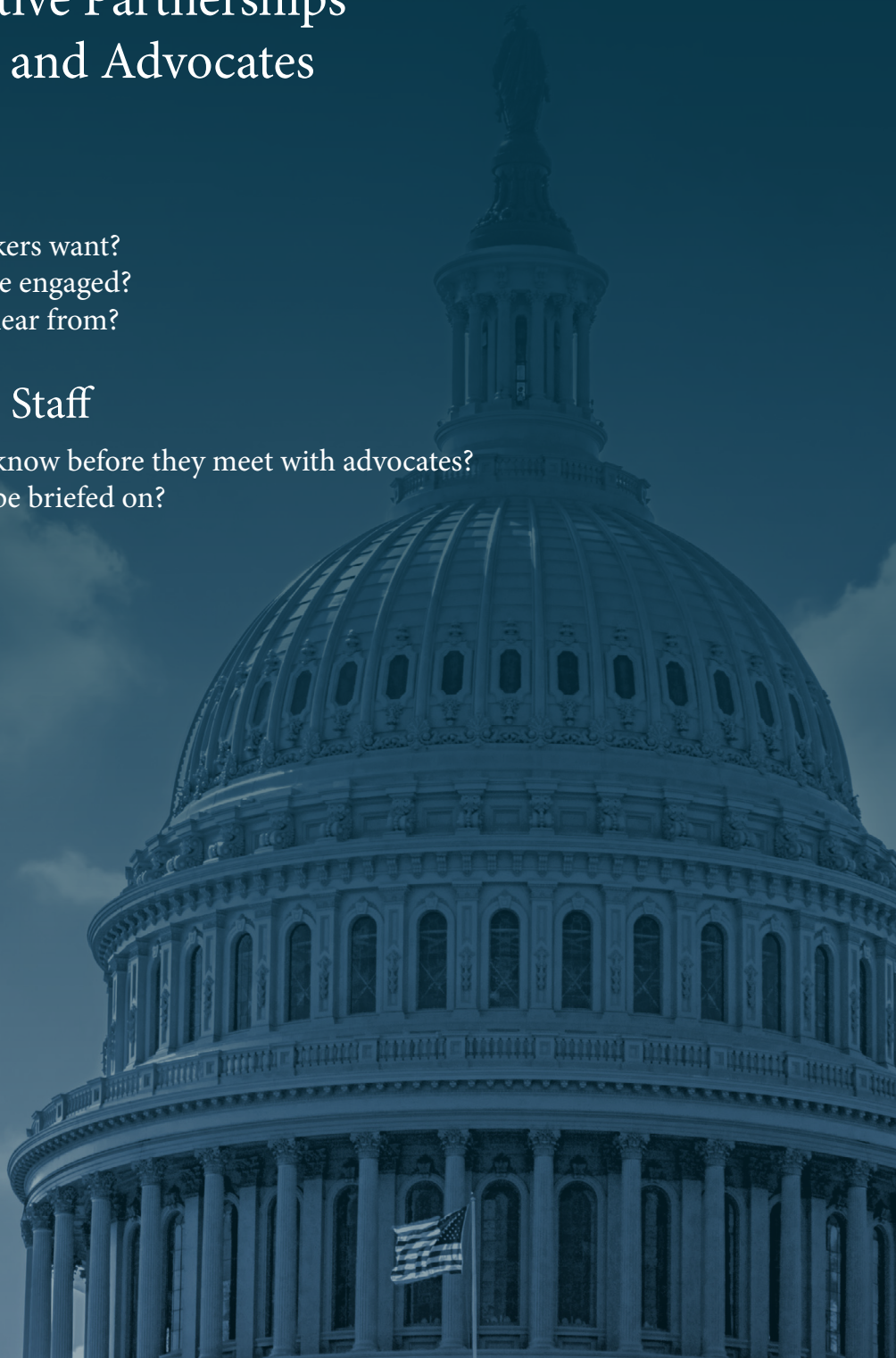
## Building More Productive Partnerships Between Policymakers and Advocates

### I. Strategies for Advocates

- What information do policymakers want?
- How do policymakers want to be engaged?
- Who do policymakers want to hear from?

### II. Tools for Policymakers' Staff

- What do policymakers need to know before they meet with advocates?
- What do policymakers want to be briefed on?



# EXECUTIVE SUMMARY

Amid heightened partisanship, information overload, and decreased trust in institutions, policymakers and advocates must forge stronger, more productive partnerships. Based on input from over 1,600 policymakers in 2019, this white paper outlines three strategies for advocates to improve their use of policymakers' time, and two tools for policymakers to equip their staff to conduct productive meetings with advocates.

## STRATEGIES FOR ADVOCATES



### WHAT INFORMATION POLICYMAKERS WANT: INTELLIGENT COMMUNICATIONS

- **Tell a Story**  
Develop a narrative for your issues that includes individuals' perspectives.
- **Show Constituent Connections**  
Demonstrate a clear connection between your message and the needs of policymakers' constituents.
- **Address Both Sides of Issues**  
Explain and address the opposing side of your issue to save policymakers' time and increase your credibility.



### HOW POLICYMAKERS WANT TO BE ENGAGED: "GOLDILOCKS" RELATIONSHIPS

- **Employ "Just-Right" Frequency and Timing**  
Develop long-term relationships through regular contact over time that is neither "too hot" or "too cold."
- **Educate and Ask**  
State your goals for each engagement and take time to educate staff and build relationships, rather than coming to policymakers exclusively with asks.
- **Build Foundational Relationships**  
Develop relationships with both senior-most policymakers and their staff to avoid engagement that is too narrow or too broad.



### WHO POLICYMAKERS WANT TO HEAR FROM: SUPPORTING VOICES

- **Grassroots Advocates** provide constituent-level perspectives on issues.
- **C-Suite Executives** outline macro-level impacts of legislation.
- **Subject Matter Experts** serve as accessible points of contact who provide details on issues.

## TOOLS FOR POLICYMAKERS' STAFF

### WHAT POLICYMAKERS NEED TO KNOW BEFORE THEY MEET WITH ADVOCATES: SCHEDULING FORM FOR MEETINGS

To prioritize meetings and improve conversations, ask your team to collect information from advocates who request meetings.

SCHEDULING FORM FOR MEETINGS	
Name of Group:	_____
Brief Description of Group:	_____
Subject:	_____
Goal of Meeting:	_____
	<input type="checkbox"/> Educate About an Issue <input type="checkbox"/> Present Proposal <input type="checkbox"/> Other
Number of People in Meeting:	_____
Other Notes:	_____
	_____
	_____
<i>*Please include a one page summary of your issue</i>	

### WHAT POLICYMAKERS WANT TO BE BRIEFED ON: NOTE-TAKING TEMPLATE

Ask your team to use this worksheet to take notes during conversations with advocates to ensure they capture the most important information.

NOTE-TAKING TEMPLATE	
NAME OF GROUP:	DATE OF MEETING:
1. GOAL OF MEETING:	_____
2. ADVOCATE'S ASK (IF THERE IS ONE):	_____
3. TOPIC OR ISSUE:	_____
4. IMPACT ON CONSTITUENTS OR DISTRICT:	_____
5. WHAT EFFORTS HAS THE ADVOCATE ALREADY MADE TOWARD ADDRESSING THIS ISSUE?	_____
6. WHAT OTHER GROUPS ARE ALSO INTERESTED IN THIS ISSUE?	_____
7. WHAT ARE THE OPPOSING ARGUMENTS?	_____
8. DOES THE ADVOCATE HAVE SUPPORT FROM OTHER MEMBERS OR GROUPS? IF SO, WHO?	_____
9. POINT OF CONTACT:	_____
10. NEXT STEPS:	_____

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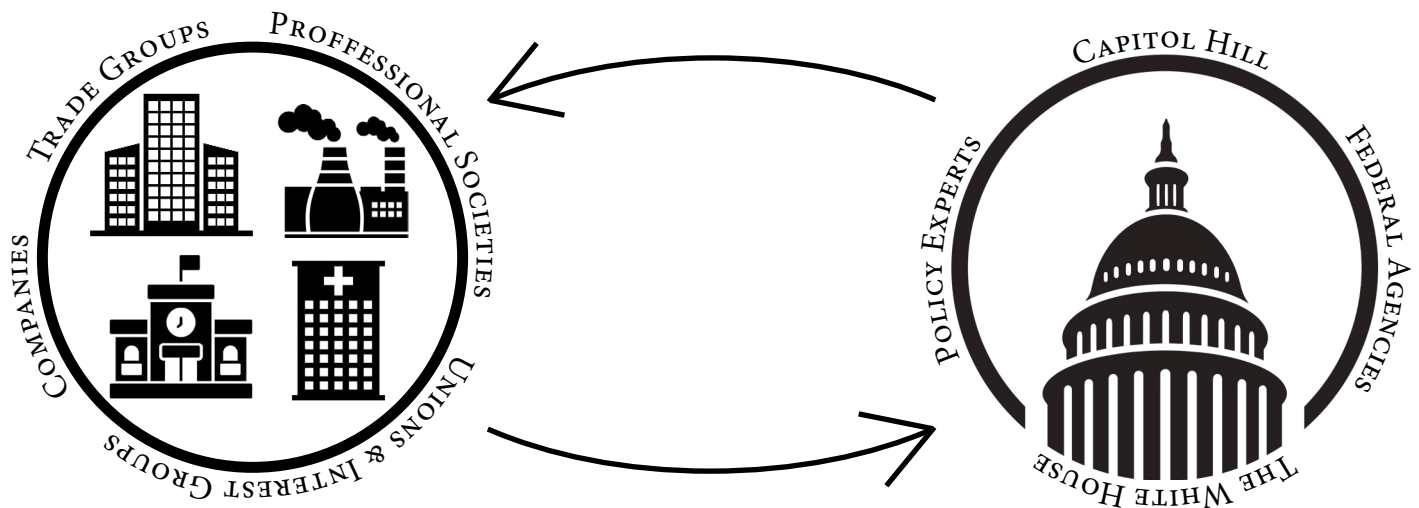
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*“I’m always trying to increase the communication quality between the regulated community and the regulators. I think when we do a better job of that, we’ll see better outcomes and better public policy being set. I only see this as a positive, so I’m happy to help.”*

-Senior Staff, Executive Branch

# ABOUT BALLAST RESEARCH

*Ballast Research provides feedback from policymakers directly to government relations professionals, helping advocates (1) make better use of policymakers' time and (2) provide resources and materials most useful to those in government.*



## OUR CLIENTS:

### THE NATION'S LARGEST CORPORATIONS AND ASSOCIATIONS



*"Ballast and its team of researchers know our industry, its issues, and the relevant policymakers. **Their data and analysis inform our understanding of what's useful to our government colleagues and how to better facilitate productive conversations about national policy.**"*

-Senior Vice President, Governmental Affairs



*"Historically, we'd engaged in various research projects that got feedback from 'policy influentials,' but Ballast was the first to help us understand our level of effectiveness among actual policymakers. Also, **we've appreciated their objectivity; there's no agenda.**"*

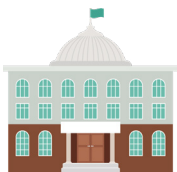
-Director, Government Relations

# OUR RESEARCH PARTICIPANTS: WASHINGTON'S SENIOR-MOST POLICYMAKERS



## CAPITOL HILL

*Chief of Staff, Committee Staff,  
Legislative Director*



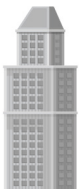
## FEDERAL AGENCIES

*Deputy Secretary, Chief of Staff,  
Policy Advisor*



## THE WHITE HOUSE

*Special Assistant, Policy Advisor*



## POLICY EXPERTS

*Senior Fellow, Economic Advisor,  
Senior VP*

## THE 2019 STUDY

325

POLICYMAKER CONVERSATIONS

1,298

ONLINE STUDY PARTICIPANTS

## OUR PROMISE

### CONFIDENTIALITY:

All participation in our  
research is confidential and  
not for attribution.

# THE INCREASED IMPORTANCE OF PRODUCTIVE PARTNERSHIPS

Throughout our conversations, policymakers described common challenges that make it difficult for both policymakers and advocates to operate effectively.

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*“A real challenge for folks nowadays is cutting through the white noise to connect with policymakers and senior staff.”*

-Deputy Chief of Staff, Congress

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*“With how divided the government is, nothing is becoming law.”*

-Chief of Staff, Congress

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*“There is more distrust for corporations on both sides of the aisle than I’ve seen any time in my career.”*

-Chief Policy Officer, Executive Branch

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# ADVOCATES NEED FEEDBACK TO IMPROVE THEIR ENGAGEMENT

Our research surfaced three factors that contribute to the challenges policymakers identified.

## INFORMATION OVERLOAD

The volume of information policymakers must filter through to make legislative decisions has increased exponentially in the past decade. Advocates struggle to convey their message to the right policymakers, and policymakers struggle to find the information they need.

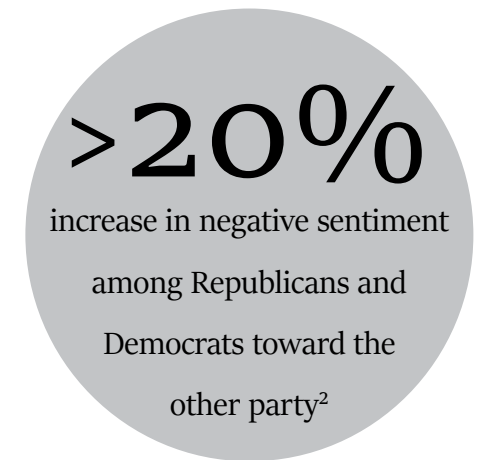
At the same time, congressional “office hours” no longer exists. Policymakers consume information and engage with content throughout the day and through an ever-expanding number of mediums (e.g., social media, mobile), which makes it more challenging for advocates to cut through the noise.



## HEIGHTENED PARTISANSHIP

Policymakers across both sides of the aisle agree that they operate in an environment in which it is very challenging to pass substantive legislation.

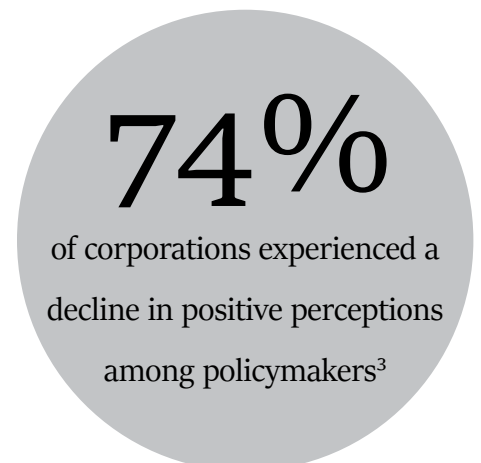
When we asked our respondents their thoughts on government shutdowns over the last decade, about half said shutdowns are caused by one political party pushing an agenda, while the other half suggested both parties were responsible for a failure to reach an agreement. If advocates want to successfully inform policy, they must gain support from both sides of the aisle.



## DECREASED TRUST

In addition to heightened political gridlock, trust in institutions has decreased across the nation during the last decade. Constituents report declining trust in corporations and in government. Politicians and business leaders themselves are the two groups with the lowest levels of trust in peers and institutions.

Because government offices’ primary concern is their constituents, advocates must establish trust with constituents before they can obtain policymakers’ attention.



1. Edelman, 2. Pew Research Center, 3. Ballast Research (2016-2019).

# **STRATEGIES FOR ADVOCATES**

- 1. WHAT INFORMATION POLICYMAKERS WANT: INTELLIGENT COMMUNICATIONS**
- 2. HOW POLICYMAKERS WANT TO BE ENGAGED: “GOLDILOCKS” RELATIONSHIPS**
- 3. WHO POLICYMAKERS WANT TO HEAR FROM: SUPPORTING VOICES**



# 1. INTELLIGENT COMMUNICATIONS

The best advocates connect their messages with policymakers' interests and concerns.

## WHAT GOOD ADVOCATES DO

### ✓ ESTABLISH A CLEAR ASK OF POLICYMAKERS

Good advocates approach policymakers with a concrete agenda and clear asks.

### ✓ PRESENT DATA-DRIVEN ARGUMENTS

Good advocates provide policymakers with credible data to support their argument.

### ✓ SUMMARIZE MESSAGE IN ONE-PAGE

Good advocates draft succinct one-pagers that outline key aspects of their advocacy.

## WHAT THE BEST ADVOCATES DO

### ✓✓✓ TELL A STORY

The best advocates bring pathos into politics. They connect constituents to their message to tell a story, which demonstrates that they advocate for an issue relevant to the policymakers' concerns.

### ✓✓✓ SHOW CONSTITUENT CONNECTIONS

The best advocates present district-level data to connect their message to constituents.

### ✓✓✓ ADDRESS BOTH SIDES OF THE ISSUE

The best advocates compare their message to opposing arguments. They show all sides of an issue, and explain how their message fits within the greater debate.

*“The best advocates are the ones that connect their issue to our district and constituents. They show me actual, substantial numbers that are impacting jobs, or show the revenue that they’re bringing into the district.*

*And I just want 1 sheet with a few topline numbers that drive their point home. Like if we don’t fix X, Y, Z problem, it will affect this topline number, this amount of jobs, whatever it may be. I just want a few statistics that drive their point home.”*

-Senior Legislative Assistant, Congress

## 2. “GOLDILOCKS” RELATIONSHIPS

The best advocates strategically manage relationships to maintain a strong connection with both staff and senior-most policymakers. They avoid overwhelming the office, but continue to grow their relationships over time.

### “TOO HOT”

- × Advocates who engage offices with frequent communications and aggressive requests. They often don’t leave policymakers enough time to respond before they reach out again.
- × Advocates unwilling to compromise when they receive pushback on their ask.

### “TOO COLD”

- × Advocates who schedule meetings only to make asks, rather than grow relationships over time.
- × Advocates without a goal for their engagements with policymakers, which results in unmemorable interactions.

### “JUST RIGHT”

#### **FREQUENCY AND TIMING**

- ✓ Offices receive enormous amounts of outreach everyday. The best advocates aren’t too scarce, but also don’t overwhelm offices with a constant stream of materials. Stay relevant with in-person visits, and follow up with supporting data for the staff who manage your issue.

#### **EDUCATE AND ASK**

- ✓ Use recess to meet with staff to educate them on your issue. Communicate that your goal is to educate them on an issue, not make an ask of them.
- ✓ Use session time to meet with policymakers and present your proposal. Present a clear ask, and compromise where necessary.

#### **BUILD FOUNDATIONAL RELATIONSHIPS**

- ✓ Before you can begin a relationship with senior-most policymakers, you must first build relationships with their staff. The staff act as gatekeepers. If you establish relationships with staff, they are more likely to support you when you present your ask to the senior-most policymaker.

### 3. SUPPORTING VOICES

Policymakers suggest that multiple perspectives on issues strengthen advocates’ messages. They identified three perspectives they prefer to hear from and the roles these perspectives should play in advocacy.

MESSENGER	WHAT POLICYMAKERS WANT	WHAT FRUSTRATES POLICYMAKERS
<p><b>GRASSROOTS ADVOCATES</b></p>	<ul style="list-style-type: none"> <li>✓ Possess knowledge of how legislation impacts constituents.</li> <li>✓ Personalize outcomes of legislation and connect them to the policymaker’s constituents.</li> </ul>	<ul style="list-style-type: none"> <li>× Serve as a token constituent to secure a meeting with the policymaker.</li> <li>× Are unable to draw connections between government affairs office’s advocacy and the policymaker’s constituents.</li> </ul>
<p><b>C-SUITE EXECUTIVES</b></p>	<ul style="list-style-type: none"> <li>✓ Outline macro-level impacts of legislation.</li> <li>✓ Demonstrate that the issue is a priority for the entire organization.</li> </ul>	<ul style="list-style-type: none"> <li>× Come unprepared to meetings and are not properly briefed on the legislation or pertinent issues.</li> </ul>
<p><b>SUBJECT MATTER EXPERTS</b></p>	<ul style="list-style-type: none"> <li>✓ Act as the main point of contact for issue-specific questions from the policymaker’s office.</li> <li>✓ Serve as an accessible resource to policymakers and staff for follow up questions.</li> </ul>	<ul style="list-style-type: none"> <li>× Maintain a weak line of communication with executives at their organization.</li> <li>× Respond to requests for information infrequently, or are otherwise inaccessible.</li> </ul>

# TOOLS FOR POLICYMAKERS

*TO HELP SENIOR POLICYMAKERS IMPROVE CONVERSATIONS WITH ADVOCATES,  
WE DEVELOPED TWO TOOLS FOR YOU TO SHARE WITH YOUR TEAM.*

1. WHAT POLICYMAKERS NEED TO KNOW BEFORE  
THEY MEET WITH ADVOCATES:  
SCHEDULING FORM FOR MEETINGS
  2. WHAT POLICYMAKERS WANT TO BE BRIEFED ON:  
NOTE-TAKING TEMPLATE
- 

## INSTRUCTIONS FOR DOWNLOADING FORMS

To download interactive pdf versions of  
the scheduling form and note-taking template, go to  
[BallastResearch.com/Scheduling-Form](https://BallastResearch.com/Scheduling-Form)  
[BallastResearch.com/Note-Template](https://BallastResearch.com/Note-Template)

*For assistance tailoring these resources to your office, email  
[outreach@ballastresearch.com](mailto:outreach@ballastresearch.com)*

# SCHEDULING FORM FOR MEETINGS

To prioritize meetings and improve conversations, ask your team to collect information from advocates who request meetings.

Name of Group: \_\_\_\_\_

Brief Description of Group: \_\_\_\_\_

Subject: \_\_\_\_\_

Goal of Meeting:

- Educate About an Issue       Present Proposal       Other

Number of People in Meeting: \_\_\_\_\_

Other Notes: \_\_\_\_\_

*\*If available, please send a 1 page summary of your issue when you submit this form.*

# NOTE-TAKING TEMPLATE

Ask your team to use this worksheet to take notes during conversations with advocates to ensure they capture the most important information.

**NAME OF GROUP:**

**DATE OF MEETING:**

**1. PARTICIPANTS AND POINT OF CONTACT:**

**2. GOAL OF MEETING:**

**3. ADVOCATE'S ASK (IF THERE IS ONE):**

**4. TOPIC OR ISSUE:**

**5. IMPACT ON CONSTITUENTS OR DISTRICT:**

**6. WHAT EFFORTS HAS THE ADVOCATE ALREADY MADE TOWARD ADDRESSING THIS ISSUE?**

**7. WHAT OTHER GROUPS ARE ALSO INTERESTED IN THIS ISSUE?**

**8. WHAT ARE THE OPPOSING ARGUMENTS?**

**9. DOES THE ADVOCATE HAVE SUPPORT FROM OTHER MEMBERS OR GROUPS? IF SO, WHO?**

**10. NEXT STEPS:**

# TIPS FROM PEERS

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## LISTEN ACTIVELY

*“To me, a successful interaction on our end is when the advocate feels heard. Even if we can’t change the policy, their input is always valued. That is the most important thing for us.”*

-Director, Executive Branch

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## DON'T BE AFRAID TO DELIVER DIFFICULT MESSAGES

*“I think Hill staffers sometimes take their foot off the gas, don't tell advocates no, or don't want to deliver bad news because they want to try to be helpful.”*

-Chief of Staff, Congress

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## IDENTIFY COMMON GOALS

*“We, as a government, never want to just be dictating to these companies what's happening. We want to be in a partnership with them on the assumption that we're all working toward the same goal, which is securing the health, wellbeing, and security of the United States.”*

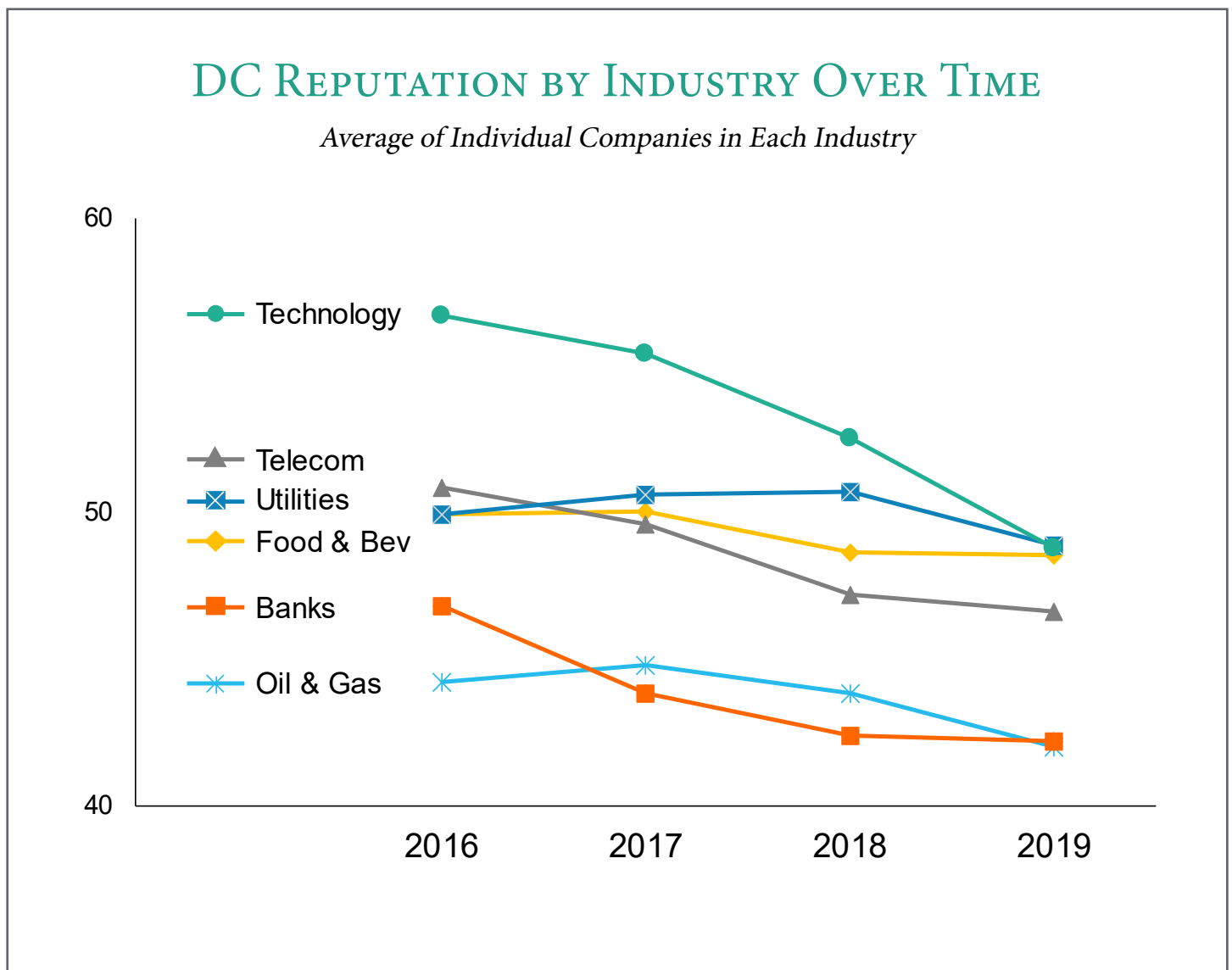
-Director, Executive Branch

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# OUR METHODS: ONLINE STUDY

For the past five years, Ballast has conducted an annual online study of individuals who work in the DC policy arena. In 2019, 1,298 individuals participated in the online study.

Respondents answer questions about their views on current advocacy practices, public policy issues, and public-private partnerships. They also rate their familiarity with advocacy efforts of various organizations who advocate in DC and provide perspectives on how effective they find their advocacy.





# OUR METHODS: IN-DEPTH CONVERSATIONS

*In 2019, we spoke with 325 individuals who shared their knowledge and insights about advocacy in the nation’s capitol.*

Our in-depth conversations provide policymakers an impartial and unbiased avenue to convey their perceptions of major organizations, companies, and trade associations, and express their views on key public policy challenges and opportunities.

By collecting and delivering candid, anonymized feedback to advocates, we help them provide better policy inputs to policymakers, and make better use of policymakers’ time. Every year, we conduct hundreds of phone and in-person interviews with senior-most policymakers from the Legislative and Executive branches of government, as well as with leading voices from across the private sector.

We share our findings with clients (companies and trade associations who advocate in DC), as well as provide a summary report back to the policymakers we interview.

All our conversations with policymakers are held in strict confidence so that they can speak with candor. We offer total anonymity to all policymakers we speak with.

*“I think insight is so important, and I’m glad that I could lend something to what you’re doing. If we can help entities understand how to communicate better, perhaps we can fix a lot of the challenges we face. But if we continue down this path of not communicating or listening to one another, it’s just going to hurt all parties involved.”*

-Policy Expert, Private Sector

## RESEARCH TIMELINE



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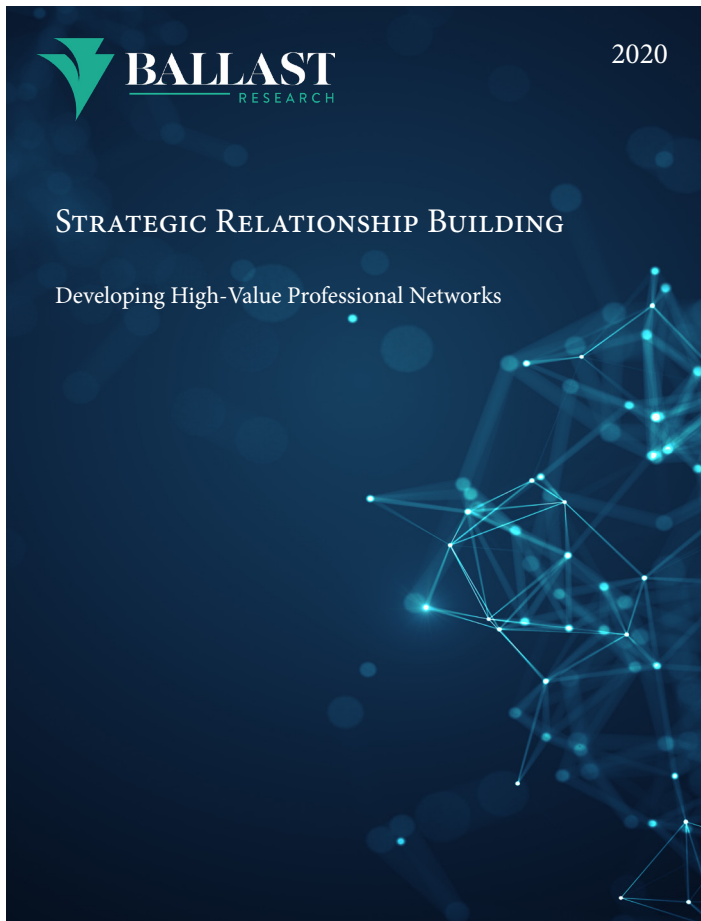
*“Politics are deeply human,  
and the one thing that always  
matters is relationships.”*

-General Counsel,  
Congress

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# UP NEXT

## WHAT TO LOOK FORWARD TO FROM BALLAST RESEARCH



### DEVELOPING HIGH-VALUE PROFESSIONAL NETWORKS

Relationships matter in DC. The city is a web of connections. These connections influence our conversations, propel our careers forward, and shape our political climate. Yet, there is little practical guidance on how to build high-value professional networks.

Look out for our report on Strategic Relationship Building in Spring 2020.

Drawing upon interviews from the past five years with hundreds of Representatives, Senators, Hill staff, and political activists, this study distills key insight into building high-value relationships in DC.

### WANT EVEN MORE CONTENT? PARTICIPATE IN THE WASHINGTON INSIGHTS REVIEW

- ONLINE STUDY  
MARCH - MAY
- RESEARCH CONVERSATIONS  
JUNE - OCTOBER
- 

**CONTACT**

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