

Penta Policy Insiders

2023 Washington Insights Review

Voice of policy leaders: How companies can improve engagement with policy staff in a divided congress

A brief note of thanks (and welcome to new policy staff)

As the new Congress takes seat, we want to say “**thank you**” to the hundreds of policy leaders who contributed to our research across the past year; and welcome the new staff arriving to Washington this month. Our work would not be possible without your generous contribution of time.

As policy leaders confront economic uncertainty and a new political landscape, we believe our **mission to improve policy conversations** by providing candid, anonymized feedback from policymakers to government relations professionals is as important as ever.

This year’s research centers on **what policymakers want to see** from advocates as engagement increasingly moves in-person, and as companies continue to engage on new social and political issues.

As we announced in December, **Ballast Research is officially now Penta!** We have partnered with a group of best-in-class data and advisory firms to become the world’s first comprehensive stakeholder solutions company. As a part of this ongoing work, our team will continue our research through **Penta Policy Insiders**. Our mission remains the same– to evaluate the effectiveness of policy conversations and provide data-driven insights from senior policymakers to those who work closely with the government to improve engagement and provide constructive resources.

We hope you will sign up to join the Penta Policy Insider community and stay up to date.



Michael Griffin

Chief Research Officer, Penta Group, Intelligence
January 2023

Executive summary

Effective engagement from private sector advocates is critical as policy staff on the Hill and in agencies face a dramatically different policy environment in 2023 with a new, divided Congress. Based on hundreds of conversations with DC policymakers, this research identifies best practices for improving advocacy in a period of increased polarization and economic uncertainty.

Penta Policy Insiders

Penta surveys and interviews thousands of policymakers across all levels of government in Washington, D.C., state capitals, and around the world each year. We use this feedback to provide policymakers with cutting-edge research and content tailored to the pressing issues that those in the public sector continue to face. Stay up-to-date by joining [Penta Policy Insiders](#) today and following us on Twitter [@pentapolicy!](#)



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Section One

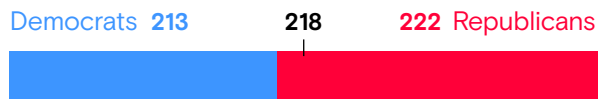
New Year, New Congress: The New Policy Environment

Divided government with razor-thin majorities

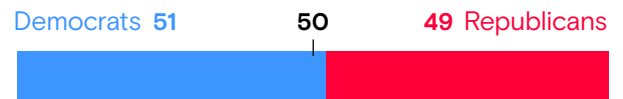
Despite early predictions of decisive party turnover in both the House of Representatives and the Senate, a divided American public elected a Republican House and a Democratic Senate, both with narrow margins. Democrats won the Senate with a two-seat majority (51-49) and Republicans saw only a nine seat advantage (222-213) in the House.¹

Congress party breakdowns

Balance in power in U.S. House



Balance in power in U.S. Senate



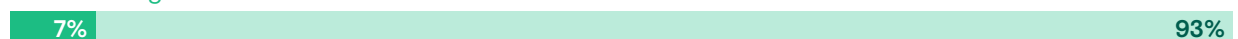
Source: AP News

Less legislation, more partisanship expected

With razor-thin margins in each chamber, policymakers on both sides of the aisle expect a more contentious legislative and political environment in the new Congress. The recent House speaker election, which required multiple ballots, illustrates the challenge of legislating with narrow majorities. Policy insiders anticipate more difficulty pursuing broad legislative agendas and anticipate the House pursuing an oversight and investigations agenda.² Following a year with notable bipartisan legislation (e.g., Chips and Science Act, The Respect for Marriage Act), the outlook for bipartisanship this year is dimmer. Less than a third of policymakers expected the outlook for bipartisanship to improve, with only seven percent of policymakers indicating they believe this kind of collaboration will be much stronger.

Outlook for bipartisanship

Much Stronger



Somewhat Stronger



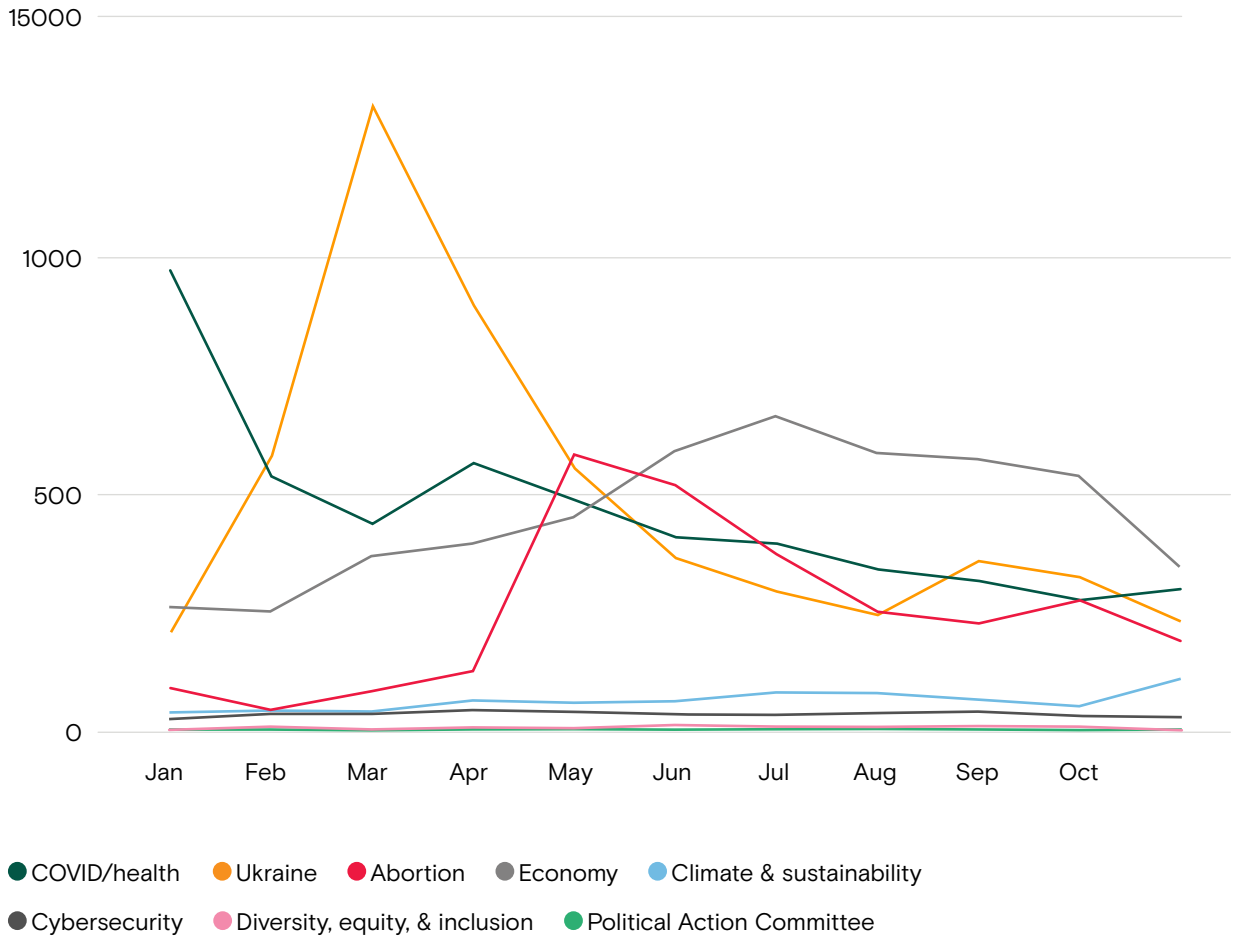
Source: Penta Policy Insiders

Policy priorities shifting to the economy, social issues

Penta’s analysis of DC-oriented media illustrates how the dominant policy concerns in Washington have shifted across the past 12 months. Last January, COVID still remained the top policy issue garnering media attention. Russia’s invasion of Ukraine quickly shifted Washington’s focus in the first half of the year. However, concerns about **abortion**, as news of the Dobbs decision was leaked in May, and the **economy**, as inflation picked up steam, soon overtook foreign policy issues leading up to the mid-term elections.

Conversations shaping DC policy

Volume of mentions of key topics in DC-oriented media

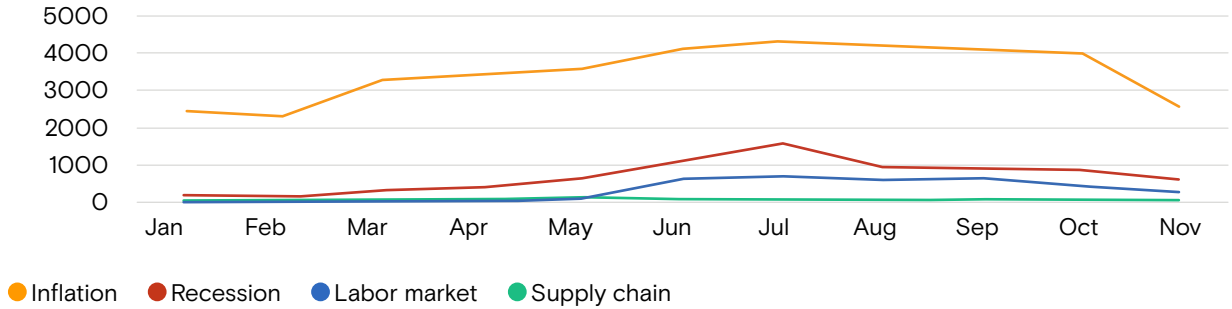


Source: Penta Group Media Analysis

Concerns about the economy are driven primarily by inflation concerns as well as risk of recession.

Inflation remains top economic concern

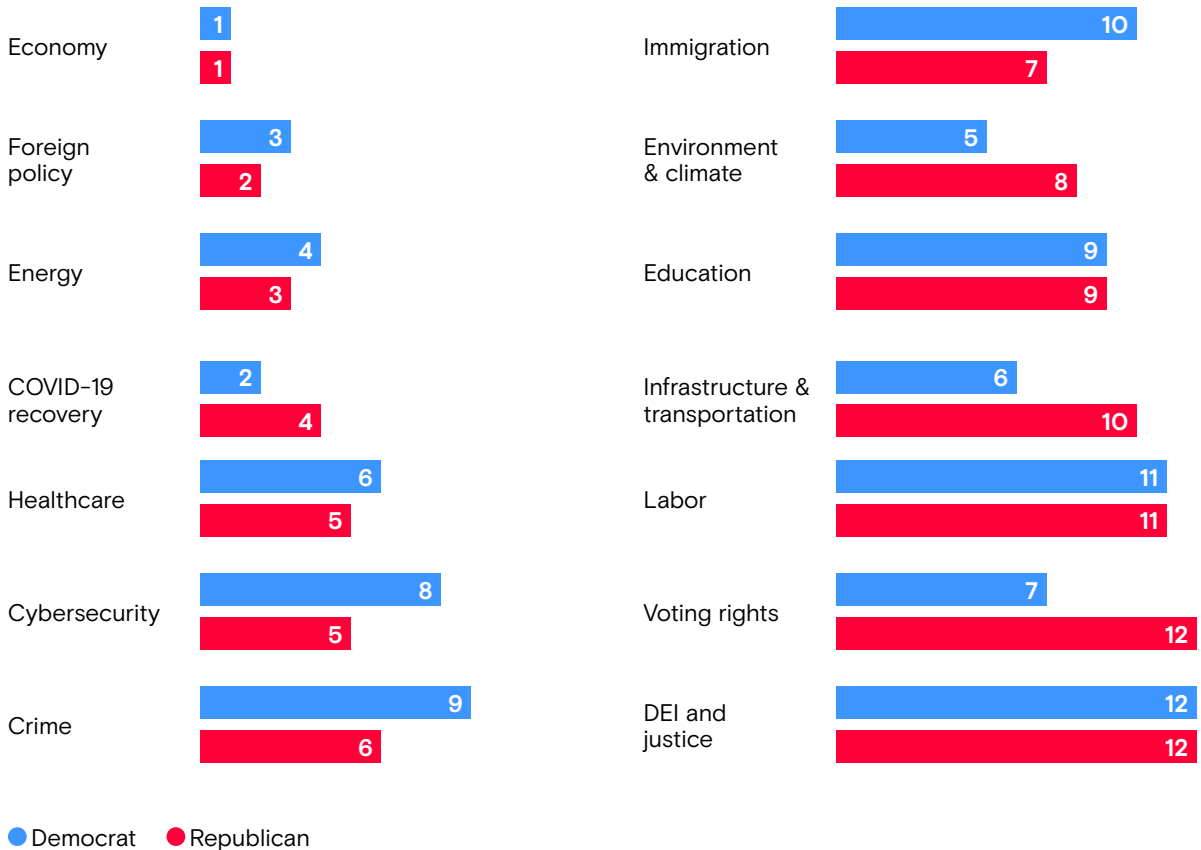
Volume of mentions by topic in DC-oriented media



Source: Penta Group Media Analysis

Policymaker priorities reflect concerns about the economy, with staff in both parties ranking the Economy as their top priority. While there is strong alignment across parties around the importance of the economy and foreign policy, key differences exist. Republicans rank cybersecurity, crime and immigration significantly higher than their peers, while Democrats prioritize infrastructure.

Ranked policy priorities by party



Economic uncertainty top of mind for policymakers

Inflation



I think we're all still sort of collectively dealing with severe disruptions from COVID that never fully went away...And it's going to take a long time for those to smooth out... **I think that there's this lingering sense from folks - especially with inflation - things are not normal.**

Chief of Staff, Legislative, R



Inflation and gas prices and consumer prices are real and palpable and have folks spooked.... different pieces of the economy are signaling and driving different places from inflation to wage growth to housing prices to gas prices.

Senior Advisor, Executive, D

Supply chain



I think the **supply chain is definitely a big one** because at the end of the day, the supply chain contributes to **inflation**. When we've got less goods, that means the prices are going to go up, and that's going to fall onto the consumer.

Chief of Staff, Legislative, D



Recession



It's no doubt people are wondering - are we going to go into a recession? I don't think that's guaranteed. I also don't think any recession would be as severe as the last one. I think people are just generally on their toes... a lot of the fundamentals are still really good... There's still plenty of iterations of things where we navigate through without a severe economic pain. But it definitely seems like things are a little off kilter because of global pandemic and conflict. And there's not a whole hell of a lot people can do to control that as individuals and that freaks people out.

Chief of Staff, Legislative, R

Labor availability



The labor shortage is a big, big issue. And I think that's a living wage, a fair wage. And it's cyclical, right? People don't want to go back to work. And then they're like, "Why should I go back to work when I'm not being paid a fair wage?"

Advisor, Legislative, R



The [labor] shortage is by far the most pressing and biggest thing and I think then kind of skilled labor is probably next. Just finding folks that actually have the skills they need for the jobs that employers are looking to hire for.

Legislative Assistant, Legislative, D



Section Two

Corporate Responsibility Under Scrutiny: Policymaker Perspectives on ESG

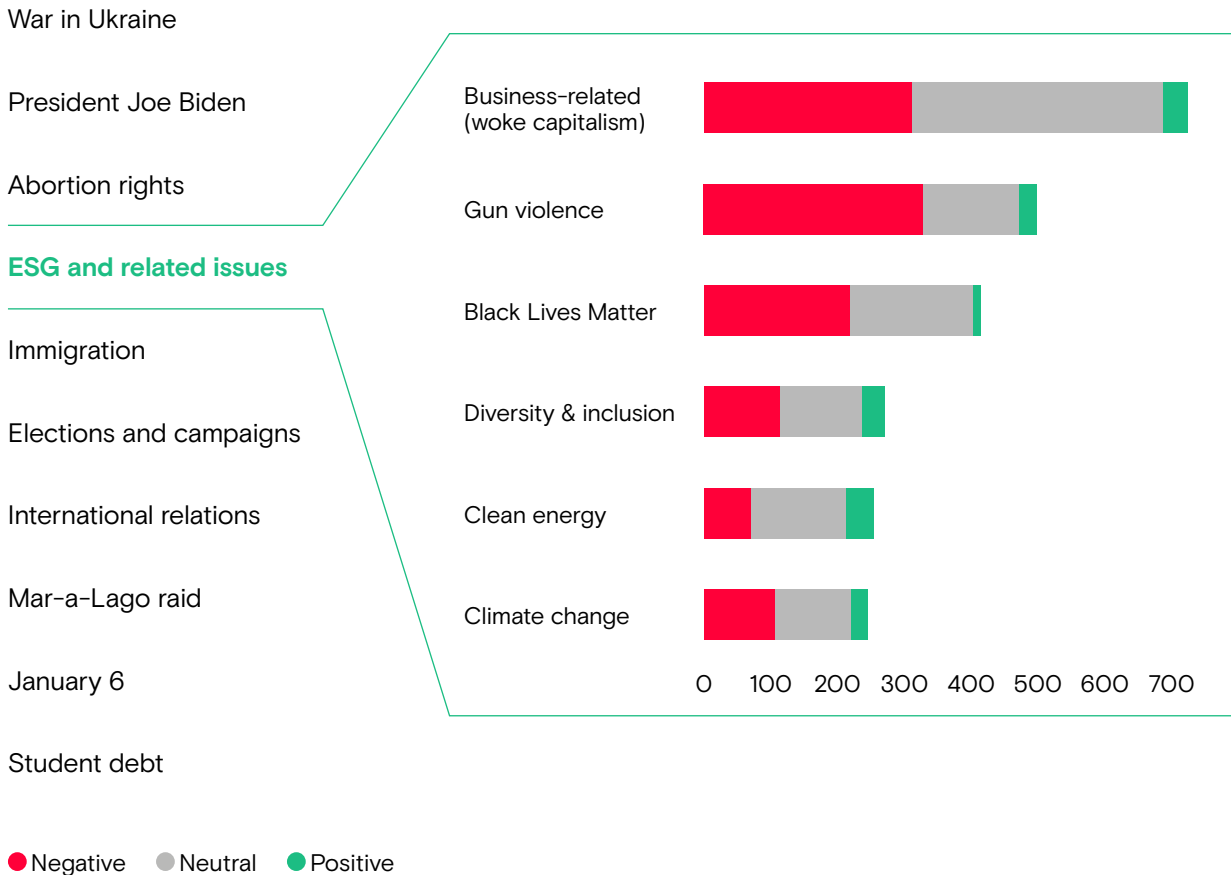
Corporate engagement missteps

As companies respond to demands from different stakeholder groups, corporate engagement on social issues has continued to generate controversy and missteps with policymakers. For example, a large entertainment company found itself in a public dispute with Florida policymakers over its opposition to the state’s Parental Rights in Education bill, leading to the loss of its special status in Florida and preceding the departure of senior executives.³

While much engagement on societal issues is welcome by policymakers on both sides of the aisle, “ESG” (Environment, Social and Governance) and “woke capitalism”, in particular, have begun to garner significant (negative) attention in conservative media.

Woke capitalism sees the highest volume of conservative media coverage and generates strong negative sentiment.

Top 10 issues of conservative media (by volume)



Source: Penta Group Media Analysis. Analysis based on 6 months leading up to the 2022 midterm elections.

“ESG” is increasingly divisive...

Our conversations with policymakers this year also point to increasing politicization and controversy related to ESG.



ESG is a huge problem. You’re going to find that a lot of the policies that more liberal representatives are not able to carry out, they’re going to do through ESG. When you start getting into second tier and third tier ESG requirements, you’re asking corporations to look three or four chains down the supply chain. And oftentimes these companies are smaller so they don’t have the capacity to hire a team of lawyers to go through this very onerous process. **You’re effectively killing some of these smaller companies.** I do believe that’s the ultimate goal of some of these ESG proponents...**As we look towards the next Congress, I think we will try to unwind a lot of these ESG mandates.**

Committee Staff, Legislative, R



I read my first news article about ESG [after hearing] the Republican Party railing against it. The Republican Study Conference is putting out a big-money effort to fight ESG companies. They’ve rolled out, in their words, a non-woke Chamber of Commerce. They’re actually introducing bills to prohibit ESG practices. So that was my real first impression of ESG after hearing the term for the first time.... In general, **I think those are things I would be inclined towards, but I hadn’t realized how divisive it is.**

Policy Specialist, Executive, D

...But not well defined or understood



I think it’s kind of hard to really pinpoint what [ESG] means... It’s kind of one of those very nebulous terms that it’s really hard to say what one corporation is doing versus another. I think it kind of just depends on what the nature of their business is.

Legislative Director, Legislative, D



There’s no real standardization either, even within a country, but especially across countries, both in how the measurements are set, how they are measured, and how they are reported.

Subcommittee Staff Director, Legislative, D



Decoding “ESG”: What policymakers need to know

The growing discourse around ESG makes it increasingly important for policymakers to understand what ESG is, and how it relates to policy issues that policymakers care about.

ESG defined

ESG is a term that originates with the investment community. ESG investing refers to the consideration of environmental, social and governance factors, alongside financial factors, in the investment decision-making process.⁴



Environmental

Considerations for how a company safeguards the environment.



Social

Ways in which a company manages relationships with employees, customers, and communities.



Governance

How decisions are governed, including the rights and responsibilities of a company’s leadership, board and shareholders.

The term “ESG”—which is often used interchangeably with “socially responsible investing” and “sustainable investing”—encompasses many different investment approaches. For example, some ESG investors exclude certain companies or sectors from their investments. Others incorporate ESG considerations into fundamental risk analysis. And others (activists) invest in companies so that they advocate directly with the company for change.

How does ESG relate to corporate conduct and to policy?

Companies have developed ESG programs to respond to demands from ESG investors for transparency into their progress against ESG criteria. These programs and disclosures often overlap with existing Corporate Social Responsibility (CSR) programs and initiatives. For example, many companies have developed Diversity, Equity and Inclusion initiatives and Environmental Responsibility programs. These corporate initiatives are related to key policy issues. The figure below illustrates a few examples of how ESG criteria related to corporate issues on the one hand, and policy issues on the other.

The link between ESG and policy

Examples of Key Policy Issues Related to ESG Criteria

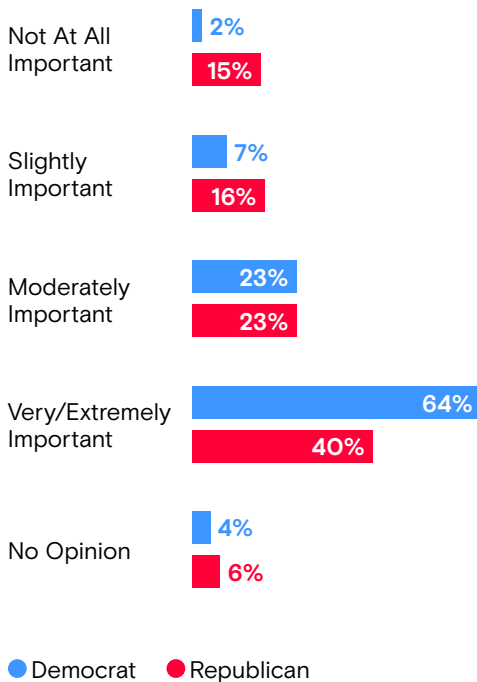


Beyond ESG: Policymaker perceptions of corporate engagement

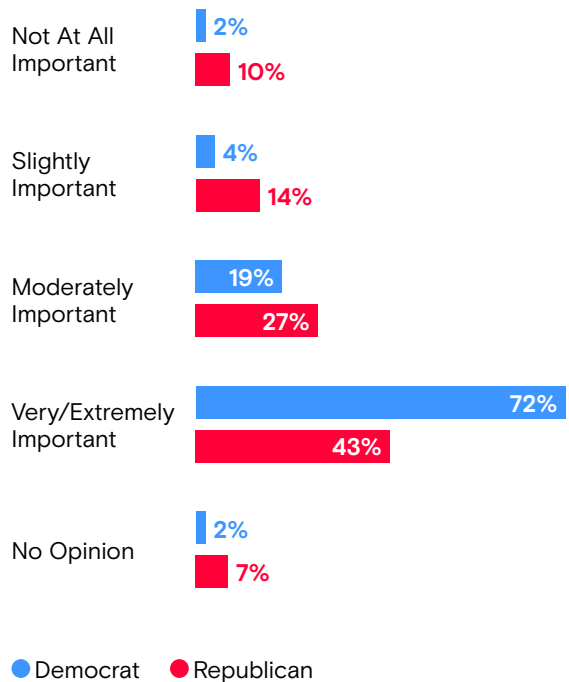
Despite the controversy related to ESG, policymakers on both sides of the aisle have high expectations for corporate conduct and corporate responsibility, more generally. And a majority of policymakers on both sides of the aisle are supportive of corporate engagement on broader societal and environmental issues so long as engagement (1) links directly to business objectives/needs and (2) avoids “political” issues.

For example, a majority of policymakers on both sides of the aisle believe corporate DEI and environmental responsibility are at least moderately important when they think of organizations that they respect. While a broad majority of policymakers share this belief, key differences exist across parties, with Democrats placing a much higher importance relative to Republicans. For example, nearly a third (31%) of Republican policymakers believe DEI is only slightly important or not important at all. While nearly two thirds of Democrats (64%) believe it is extremely important.

Importance of organizational commitment to diversity, equity, inclusion, and justice^a



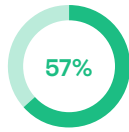
Importance of organizational commitment to environmental responsibility^b



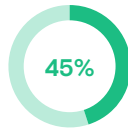
Source: Penta Policy Insiders

Within the broader topic of environmental responsibility, policymakers prioritize initiatives related to renewable energy.

Most important aspects of environmental responsibility for companies and associations



Initiatives around renewable energy



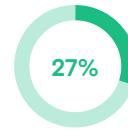
Initiatives around net zero emissions



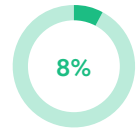
Initiatives around carbon neutrality



Initiatives around the electrification of automobiles



Initiatives around carbon capture and storage



I don't think efforts related to environmental responsibility should be a priority

Our conversation with policymakers reinforce key differences, as well as areas of agreement, between Republicans and Democrats in terms of the types of engagement they find helpful.

While Democrats welcome corporate engagement on social issues...



[Companies] have a responsibility to be engaged.

Director, Legislative, D



We hold everybody to the same standard. You're a part of our ecosystem just like everybody else, and you should be trying to help make the world a better place.

Senior Policy Advisor, Legislative, D



I appreciate when private sector advocates engage on racial justice and reproductive rights justice. There's a lot of organizations that could do more. Many corporate boards are still overwhelmingly white and male. If they are not only willing to make change but to call themselves out and publicly criticize themselves, I appreciate that. I would support companies who do things like that, go out of my way to support them.

Senior Staff, Executive, D

...many Republicans respond negatively to engagement that veers into political issues or too far from core business issues...



I think there is a distinction between what are general societal needs and political issues. Corporations that look at societal needs in a general non-political way – I think that is effective. I think corporations that veer into a political end do themselves and their cause damage... Ultimately, I think the public companies have an obligation to their shareholders. And when they get involved in politics in a certain way, I think that's generally a dangerous thing. Specifically when they get involved in stuff that has nothing to do with the company.

State Director, Legislative, R



I'm not a fan of seeing companies engage on the minutiae of policy and political questions. Certainly, exceptions can or should be made, but if you're selling toothpaste and you're suddenly speaking out on a hot political issue, I personally have a bit of an issue with that.

Chief of Staff, Legislative, R

Policymakers on both sides of aisle welcome CSR initiatives related to core business.



The ones that do it well engage on issues that actually have to do with their company and show that their mission is aligned with those goals.

Senior Policy Advisor, Legislative, D



It's a beer company, so they're partnering with Mothers Against Drunk Driving and Uber and Lyft around major summer holidays to encourage people not to drink and drive.

Director, Legislative, D



Corporate citizenship is a very good thing within the realm of what the company does. If you're a company in the cyber area and leading the field of protecting cyber, that's great. But I don't want my soft drink company to be the thought leader on civil rights.

State Director, Senate, R



Bi-partisan issue spotlight: Digital access

Digital access surfaced in conversations as a priority with policymakers on both sides of the aisle, as the COVID-19 pandemic highlighted disparities in broadband connectivity, telehealth services, and remote learning.



I think [broadband access] is always a priority. I think the pandemic and remote schooling shined a bright light on it, but it wasn't a problem because of the pandemic, and it's not like now that the pandemic's kind of fading away a bit, that it no longer remains a problem...**affordable access to broadband is just essential in everyday life to participate in the education system, to participate in our economy.**

Chief of Staff, Legislative, D



I think it's not only important, it's just appealing, right? It's appealing because it hits so many folks, right? It hits lower income, and, diverse communities, and equity issues. It hits rural folks. I think broadband access has a lot of appeal because it's an equalizer, because it's a connector, because it's a generator of commerce and dollars.

Senior Advisor, Executive, D



I think broadband has been a huge issue, especially with telehealth, with schooling,So I've seen a real interest grow on both sides of the aisle, both Republicans and Democrats, for expanded telecoms broadband accessibility.

Advisor, Legislative, R



What policymakers want to see: the three “A’s” of effective engagement

As companies look to effectively engage on societal issues related to their business, our interviews with policymakers suggest three keystones of effective engagement:

① Be accountable



I want to see real realistic plans. I'd like to really see the benchmarks. I don't think anyone expects for a Fortune 500 company to be able to meet these goals overnight, but I'd really like to see what their plans are, and then deliverables that they intend to meet. I think just kind of the information about what they intend to do, how they intend to do it, and what their timeline is would be really helpful.

Former Executive Director, Executive, D



I think it's important to talk about how long and how successful it's been versus we're doing this because we feel obligated to do it, right? I think it's like you need to make it authentic and talk about its history and talk about its success a little bit more.

Advisor, Legislative, R

② Be authentic



You have politicians that are trying to carry out their own personal beliefs upon the country... Because you don't have the backing to pass this in policy, instead you put through these ESG mandates, which the only way for companies to fully comply with your belief of where they should be is by following through on these mandates. So I think it's just kind of a background way of getting policy done without actually passing the laws that they want to because they don't have the votes for it.

Committee Staffer, Legislative, R



With everybody putting out statements like “Okay, we’re for pro–democracy.” **If you’re going to actually do that, don’t walk it back six months later.** And, I understand it’s how business and DC operate, but I mean, it’s also a gimmick. “We’re in Pride Month, folks, that put rainbow flags on everything and then donate to LGBTQ politicians.” **It’s giant marketing. I think that’s disingenuous.**

Legislative Assistant, Legislative, D



Tech companies **make efforts to show that they care.** So they’re doing all these community events in all these cities all over the place. They have teams of people that travel full time. So I commend them on that... They all do a good job talking about climate change, what they’re doing for the environment, what they’re doing to be more diverse in terms of hiring. Those are types of things that are positive.

Former Chief of Staff, Legislative, R

③ Be actionable



We’ve also seen efforts for [technology companies] wanting to go ahead and give the opportunity to a lot of inner–city youth to get into the tech sector. They’re **going ahead and supplying a lot of grants to various school districts...for them to go ahead and have the type of foundation for STEM career....**So we definitely commend the tech sector for wanting to go ahead and do whatever it is that they can to impact children in wanting to pursue STEM careers as a livelihood.

Advisor, Legislative, D



My boss is a believer in ESG requirements. He thinks that this is going to be a category just like profit that young investors are going to take a look at... **Our view is if you’re going to be a big company and you’re going to run out and tell the world that you’re going green, that you do things ethically and that you want to be noted in the market for being different because of that, then that’s great, let’s make it a requirement, and then you can be scored versus everybody else.**

Chief of Staff, Legislative, D



I think **ESG has to return shareholder value** versus making me feel good and warm and fuzzy.

Former Chief of Staff, Executive, R

Section Three

How Policymakers Want to be Engaged in 2023: 6 Painpoints to Avoid

As in-person engagement returns to DC, policymakers point to the benefits of in-person relationship building and identify key pitfalls private sector advocates should avoid. With a new Congress, an influx of new staff, advocates should reevaluate their approach to engaging policy staff.

Relationships are (still) key

COVID-era engagement did not diminish the importance of relationships and relationship building to effective advocacy. In fact, the lack of in person access during COVID lock-down underscored the importance of existing relationships. Looking forward, policymakers continue to highlight the central importance of relationships to effective engagement in DC.



Building the relationship - not just being transactional, trying to understand what's important to the person you're meeting with, identifying with them... but also looking for ways to relate to them and finding things within your company that are important to relate with... You need to find a way to connect.

Deputy Chief of Staff, Former Legislative, R



It's really about relationship building, right? I think it has a lot to do with making sure that you, as the advocate for a given industry or interest, are continuing to do two things. One is building relationships with the key people in the administration and on Capitol Hill to...at least make sure they know who you are and that you care about these issues... have those relationships.

Chief Counsel, Legislative, D

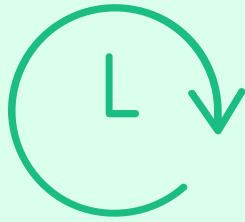


If you don't have relationships and they don't know who you are and you don't go see them regularly and you're not involved in their activities, then you're probably wasting your money.

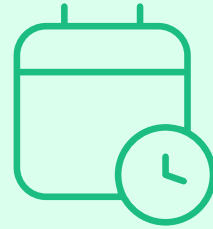
President, Private, N/A

This emphasis on cultivating deeper relationships is a priority on both sides of the aisle, but can be hard to achieve without fostering strong connections and sharing information in a way that is useful to policymakers. Democrats and Republicans identify **common missteps** that advocates make that get in the way of effective engagement. Here, we outline those **pain points, and how advocates can avoid them.**

6 policymaker pet peeves



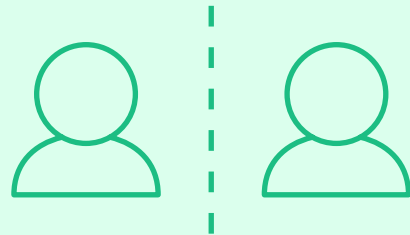
Last-minute asks
(without laying groundwork or building relationships)



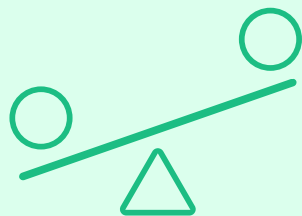
Poor timing
(lack of sensitivity to calendar and focus of staff)



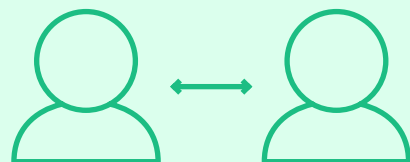
High-effort communication



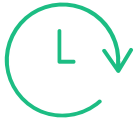
Infrequent engagement



One-sided arguments



Narrow engagement



Last-minute asks

Policymakers don't want to be approached only when advocates need something or when an issue comes up. Instead, policymakers say advocates should **be proactive** in their engagement and relationship-building efforts.



I think the **best practices that I see are people who are getting ahead of the issues** as opposed to an urgent call and email about something that's going to happen in 12 hours... Of course, we definitely appreciate the heads up and a sort of rapid response, if you will, about something that's breaking, but **the relationships definitely get built earlier.**

Chief of Staff, Legislative, D



[Advocates] **need to engage members of Congress, even when there's no issue before them.** ...You still need to build those relationships and go see them and just to connect and engage them... Bring them into the family. **Even though you may not have a request for a specific legislative or regulatory provision during the course of a 12-month period, you still need to maintain those relationships.**

President, Private



I think that non-priority issues - **you still need to go in and have those conversations with the members of Congress...I think you still really need to [engage] with non-priority issues** and maybe start the conversations and say things like, "Hey, we recognize this climate provision. There's not going to necessarily be action on it, this Congress, because there was this huge climate bill. But it's still important to us. And this is why it should be important to you..."

Former Executive Director, Executive, D



Poor timing

The legislative and election calendar impact policymakers' availability to engage with advocates. One frustration policymakers voice is a lack of awareness on the part of advocates in terms of what's going on in offices when conducting outreach. Policymakers want advocates to **be strategic** in thinking about the timing of their outreach and engagement.



If you're trying to reach out and ping folks at the same time in a non-strategic way, you're not going to get the same effectiveness... **It's being smart about it and syncing up the right timing in my opinion.**

Staff Director, Legislative, R



Being more strategic about timing is important. It's not to say that we don't care about a whole lot of different issues. But when we're in session or have a big primary election, whatever it may be, that has to be our priority.

Staff Director, Legislative, R





High-effort communication

Policymakers are *busy* and lack time to decipher unclear asks or wade through information to pull out the key take-aways and implications. Policymakers value and appreciate **clear, concise communication** that spell out the ask, as well as the “so-what” for constituents.



I think that **receiving some information ahead of time from email is helpful. I think that advocates work best when they have a very clear ask...** I think people that come in with a whole mixed bag, and also that try to give you too much information, don't do themselves any good...I'm a big fan of a one-pager... **What is it we're asking? What's it going to cost? What's the benefit? Who's affected?**

State Director, Legislative, R



From the Hill perspective, having fewer sit downs for the client to get through their presentation meetings and more, at least with the good lobbyists, **condensing what it is that the client needs... and...saving the Hill staffer the full hour briefing** and just doing it all in a 15 to 30 minutes phone call and following up with an email... to **get the ball rolling**. I think that is a positive development.

Legislative Director, Legislative, D



Refined information is always helpful. And sometimes just sending an email with some information's great, if we can't get meetings scheduled, because then we're still able to kind of go through it on our own time and then look at stuff.

Legislative Assistant, Legislative, R



One-pagers, things that have facts, and figures, and graphs, and charts. **Data is important.**

Chief of Staff, Legislative, D



Infrequent engagement

Policymakers say that it's harder to build connections and engage effectively when advocates only reach out sporadically. They don't appreciate one-sided relationships. Policymakers emphasize that advocates should **be consistent** in their communications in order to build rapport and good will.



There are a lot of groups on good government advocacy - voting rights, human rights, civil rights kind of groups. They're not corporate industry, but they are **constant advocates. They tend to be effective because they communicate with the relevant policymakers regularly and they weigh in on all the issues that are important to them.** So I think they're good at it because **they do play the long game**, and I think that's an effective thing.

Chief Counsel, Legislative, D



Staying in contact is important and not staying behind. I appreciate the communication without going over one to two emails a week... I get probably 200 from my emails a day, so... I don't have time to dive through longer things.

Committee Staff Member, Legislative, D



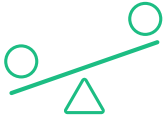
It's helpful to have a rapport established. And you can't really establish a rapport with staff if you are only seeing them once a year and you're coming into ask for something. So it's almost like you develop that relationship by bugging people.

Chief of Staff, Legislative, R



More regular engagement. I mean, I would say I probably get an email from [certain organizations] maybe twice a year and maybe request to meet with them once a year. So [it's helpful] if they're looking to have a broader presence on the Hill or regular engagement on the products that they or reports that they are issuing and just sharing that information with us whether or not there's a direct ask from them.

Policy Advisor, Legislative, N/A



One-sided arguments

Sharing only one side of an issue, with-out addressing other perspectives, forces policymakers to do the research themselves to understand what the competing viewpoints are. Policy leaders appreciate **balanced** communication that anticipates and addresses competing perspectives, and incorporates local considerations/voices, not just DC perspectives.



All kinds of lobbyists will come to you and they'll say, "Hey, don't do this. It's bad." But then they won't give you the other side....[a good approach] is to say, "Look, our industry is against this for the following reasons, X-Y-Z. Here's what the other side will tell you it's going to do." So they actually present the other side's argument, and then they will say, "Here's why we disagree with those. We hope you'll be with us." So I have found their approach to be quite balanced.

Chief of Staff, Legislative, D



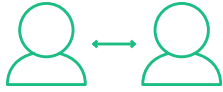
I would tell any interest group, if you want to have the most amount of credibility on whatever issue that you're arguing for, **be balanced in your approach. Clearly state why it's bad or not good for your industry, highlight why the other side thinks it is, and then you can argue against those points, but be balanced in your approach.** That's what I would say.

Chief of Staff, Legislative, D



They were good enough that they made sure that they brought and pulled in local folks. So it wasn't just the national, although the national did engage with phone calls and emails. But I think making sure that **using people from our district, from our state was key to delivering the message.** It means a lot to—the message means a lot more, I think when it comes from people that are in your own backyard and have a real connection to you in that way.

Chief of Staff, Legislative, R



Narrow engagement

It's important for advocates to lay the groundwork for relationships and requests by engaging proactively with staff in addition to members. Policymakers say advocates miss opportunities by focusing too narrowly on who they engage with, whether that is ignoring staff or offices that they believe are "lost causes." While advocates need to be strategic about prioritizing their time and effort, policymakers believe that many would benefit by **broadening their outreach**.



Focus not only on members of Congress, not only the members of committees, but everyone across the board... It just shows that they're engaged because they're proactive before an issue comes up.

Chief of Staff, Legislative, R



As a young staffer, if you have the ability to participate [in company events], that really could encourage you in the future to have allegiances or preferences for those companies because they made an effort to reach out and educate them... When you're only doing it to elite staff, no one sees that as being helpful...**you should make it available to everybody including interns.**

Former Chief of Staff, Legislative, R



A lot of times members are either tuned out to those on the other side of the issue and don't want to talk with them or even **sometimes the advocacy groups themselves don't try to engage, or give up on a member because they think they're a lost cause, which is maybe not the right thing to do...** sometimes those conversations are very helpful and educational in figuring out where they need to go and how they need to approach the other side.

Former Chief of Staff, Legislative, R



In person vs. remote engagement: what do policymakers prefer?

Different individuals and different offices have varying policies and preferences related to in person and remote engagement. And regardless of the channel (in person vs. remote), the most important request from policymakers is that advocates make effective use of their time.

That said, in general, policymakers, especially on the Hill, have a preference **for the reestablishment of in-person meetings**. While many, on both sides of the aisle, acknowledge that remote collaboration has its benefits and will continue to play an important role, the return to more traditional forms of engagement is generally welcome.



Face-to-face engagement key for building relationships

Policymakers emphasize the benefits of in-person engagement with advocates, highlighting how this way of working together allows for **more impactful, connected, and effective relationships**, which policy staff say **foster more productive outcomes**.

Impact



In-person meetings are very beneficial. Getting an email or even a phone call sometimes doesn't really quite do enough. But **sitting down with somebody across the table face-to-face and hearing their story and their need for help is impactful.**

Chief of Staff, Legislative, R



I want to see people, shake their hand, look them in the eye, spend the first 5, 10 minutes catching up, going into background, getting to learn somebody before diving in on an issue.

Committee Staff Member, Legislative, D



Connection



I think what we've lost during the pandemic was that human touch. And I think that's what has led to more of this divisiveness and rancor because people lost the ability to sit down in a room across the table from each other and have a conversation....there's a real value to the face-to-face conversation that we've really lost the last couple of years.

Former Chief of Staff, Legislative, R



Internally, we are seeing an uptick in people that are requesting to meet in person. They actually want to come to the office and they want to see him. And the Congressman is actually happy to meet with people in person.

Director of Constituent Services, Legislative, D

Effectiveness



I know I'm different than others, but I tend to be a more personal person...when you're on Zoom or whatever, sometimes there's technical issues. Somebody couldn't get their microphone to work... someone else couldn't get their camera to work, and you're talking to a black screen with somebody's initials on it. I don't like that.

Committee Staff Member, Legislative, D



Remote engagement critical for access and flexibility

While many policymakers express a preference for in-person engagement, they also point to the flexibility and convenience of virtual engagement, as well as its importance for providing access to advocates groups who find it difficult to travel to DC. There is consensus that **virtual communication will continue to be an important tool** for advocacy engagement.

Convenience



Remote is convenient. You can do more meetings via remote than you can do in-person meetings. I would say remote meetings are great.

Director of Constituent Services, Legislative, D



I think the virtual option is so great to have. Given that our district is like halfway across the country, we know it's not always super feasible for folks to get here for in-person meetings, so that option is still great to have, and I think that just provides some additional flexibility.

Legislative Assistant, Legislative, R

Efficiency



Remote [advocacy] is quick. You can hop right on. You don't have to leave your desk. You're right there. You're in the meeting, which is nice and can be effective, especially on a busy day.

Staff Assistant/Legislative Correspondents, Legislative, R



There's also the fact that you can get in many more meetings if you're doing some of them virtually.

Deputy Chief of Staff, Legislative, D

Access



I think it's more flexible for us but also for people who want to request meetings with our office because sometimes people just can't get up here for whatever reason. I don't want that to preclude them from being able to talk with the Congresswoman or other members of the staff.

Legislative Assistant, Legislative, R



I think it's helpful...From the advocate perspective, a lot of people can't travel to Capitol Hill to be an advocate and it's a considerable expense and privilege to come to the Hill and take time off and travel and pay and things like that.

Deputy Chief of Staff, Legislative, D



The offices are just so...small. And this way the other side - the person calling in - they can have more folks on the phone. And for our constituent groups back in the state, obviously, it's a heck of a lot cheaper for them to be able to call in and do a Zoom call with staff and even the member than having to fly up to DC and all the costs incurred with that.

Senior Legislative Assistant, Legislative, R



About Penta Policy Insiders

Penta provides direct feedback from policymakers to government relations professionals, improving advocates' ability to understand, validate, and improve the efficiency and effectiveness of their engagement.

About Penta

Penta comprises over 200 professionals in New York, London, Washington, D.C., and San Francisco working to bring data-driven, tailored solutions to a majority of the Fortune 50 Companies and their associations.

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Graph Questions

- a. The full question asked of participants read: As you think about the organizations that you respect the most, how important is their commitment to Diversity, Equity, Inclusion, and Justice?
 - b. The full question asked of participants read: As you think about the organizations that you respect the most, how important is their commitment to environmental responsibility?
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Penta Policy Insiders



We want to be in a partnership with [the private sector] 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
