

A Penta Policy Insiders White Paper

Penta Policy Insiders

The Tech Takeover

Policymaker discussions on the 2023 digital landscape

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A brief note of thanks

As we start the new year with the publication of this report, we wanted to say “thank you” to the hundreds of policy leaders who participated in our research over the past year. Our work would not be possible without your generous contribution of time.

This year’s research centers on the impact of cyberspace - for policymakers, for advocates, and for the world. In an era of rapid digital advancements, our report provides insights and context for evolving tech priorities and highlights best practices for improving advocacy in an increasingly digital world.

Our mission at Penta Policy Insiders has always been to improve policy conversations. Your candid, anonymized feedback about both policy issues and productive advocacy strategies allows us to evaluate the effectiveness of policy discussions. We continue to provide data-driven insights from senior policymakers to those who work closely with the government in order to improve engagement and bring you constructive resources. We appreciate your ongoing support of our research, and hope you will continue to be a part of the Penta Policy Insiders community!



Michael Gottlieb
Managing Partner of Research, Washington DC
January 2024

Executive summary

The digital landscape has never been as complex as it is now. Technological advancements around communications, financial security, artificial intelligence, interconnectedness of markets and supply chains, and access to information have cemented digital security and reliability as essential pillars of modern life.

This holds particularly true for policymakers in the United States who are working to bolster national interests and foster international cooperation in an increasingly digital world. Technology is top of mind for policy leaders this year, both when it comes to policy priorities and reflections on effective advocacy. Based on hundreds of conversations with D.C. policymakers, this proprietary research identifies and tracks tech policy's shifting prioritization and highlights best practices for improving advocacy directed towards policymakers and staff - who are increasingly reliant on and adept with technology in their personal and professional lives.

Penta Policy Insiders

Penta interviews and surveys 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, custom research and content tailored to the pressing issues faced by those in public service. Stay up-to-date by joining Penta Policy Insiders today and following us on Twitter [@pentapolicy!](https://twitter.com/pentapolicy)

This study also draws on similar research that Penta conducts annually on advocacy in Washington, D.C. as well as findings from the Penta Insights Platform.



A new era of advocacy

In an era where the breadth and availability of information is continuously increasing, it can be easy to forget that not all resources are created equal. The amount of information we are exposed to creates a need to ensure the reliability of the content we see. And this is most important for those individuals in charge of making decisions based on that content – policymakers.

With steady concerns about disinformation, the balkanization of media, and the impact of AI, policymakers are increasingly cautious when it comes to the input they receive.^{1,2,3} As such, policy staff are placing a premium on reliable data, and the best advocates are taking advantage of that. Policymakers highlight multi-faceted, data-driven engagement with expert involvement as the new standard for effective advocacy in D.C.



I think the problem is that with the Internet we generally default to doing an Internet search on issues. But we really have to be mindful of what sources those are. And we have to be able to check those sources. So, **I would turn to the Internet, but you do have to know what the source is that you're using.**

State Director, U.S. Senate (R)

Trusted sources

From least to most trusted



Rather than focus solely on traditional strategies, policymakers want to see advocates embrace credible sources and measurable outcomes, and incorporate in-person experiences (like site visits and testimonials) as part of their approach.

The art of data-driven advocacy

Our interviews with policymakers this year indicate interest from staff in receiving contextualized informational materials that are bolstered by research and data, and tailored to specific needs. As demonstrated in last year's research, policymakers want to see unbiased perspectives but this year they also highlight their preference for measurable evidence to back up the viewpoints presented by advocates.⁴



Research is obviously key to any kind of argument you're trying to make. It helps supplement that. In terms of the kinds of research, quantitative is really helpful if we're able to see year-over-year or whatever the time frame trajectory might be - what the impact [of a program or the work that they're doing] has been. That's certainly helpful and definitely helps make a better case for whatever it is you're trying to communicate.

Special Assistant, Executive Office of the President (D)



I've noticed a shift towards more targeted and data-driven advocacy. Companies seem to be increasingly leveraging analytics, such as providing a one-pager on the number of jobs and money and sales volume that comes into our district in particular, and just using that [evidence] to really inform us... **It seems like they're using analytics on their end to understand legislative trends** and identify key decision-makers on the Hill. And I think companies have used that to allow them to **tailor their messaging** more effectively and align their efforts with specific policy goals.

Legislative Assistant, U.S. House of Representatives (R)



I would say **what's most effective for me is just data.** I don't need a fancy PowerPoint deck. I don't need a split angiographic. I need a clear-eyed assessment, and return on investment, and the risk to my product if I don't make the investment. That's it. I don't need a discussion on culture. I don't need a discussion on values. I think those things are important, but ultimately, that is not how I will be incentivized... **What are the measurable outcomes, and then how do we drive towards that?**

Staff Director, U.S. House of Representatives (D)



When I'm engaging in advocacy, **both data about what constituents think and academic studies to back them up have been the most valuable.**

Senior VP, Private (R)



It's often **most helpful to have concrete data** and district-specific or state-specific data points and examples.

Legislative Director, U.S. House of Representatives (D)

Active advocacy: Starting your best players

Policymakers want to see more involvement from C-Suite stakeholders and experts, noting the benefits of such engagement to effective advocacy. First-hand accounts from those actually engaged in business operations can provide helpful, practical insights to policymakers about the needs of companies.



Having a cup of coffee with the executive director of a prominent nonprofit or the chief operating officer of a prominent business or a school board president - those **individual meetings are quite valuable.**

Regional Director, U.S. House of Representatives (D)



The [industry] will set a fundraising event and they'll bring in the president or senior vice president of X, Y, Z, company. And they'll invite 50 members. And each member will come by and they'll get to talk to that person. **It's incredibly helpful because you get to go right to the source.**

Chief of Staff, U.S. House of Representatives (D)



If they're coming here and they're **speaking as a practitioner rather than somebody speaking theoretically** about how their business operates, then it's quite helpful.

Former Chief of Staff, U.S. House of Representatives (R)



It never hurts to have CEOs or someone in high corporate areas putting their input in. And then if they receive input from the other teams, that's just more knowledge that they receive as well.

Staff, Department of Homeland Security (I)



It's helpful to hear from executives, particularly because for our office, my boss is a small business owner, so I think he gets where they're coming from and [it makes] those conversations better.

Chief of Staff, U.S. House of Representatives (R)

An immersive experience is ideal

Policy staff value a more hands-on approach that allows them to participate in comprehensive events or activities, and hear from multiple voices while doing so. Policymakers highlight the virtue of site visits, testimonials, and ride-alongs as particularly engaging opportunities that help them better understand issue areas.



We did a ride along with [a delivery company] and the teamsters and [my member] put on the [uniform] and helped deliver packages to the small businesses in our community. It was great. We were able to talk about the positive impact of both [the company] and the workers. So **I think that when there are opportunities for the member... to go behind the scenes, go on a site visit, actually do whatever the job is, or learn from or talk to the workers, get beyond just the executive suite, I think is always positive.**

Chief of Staff, U.S. House of Representatives (D)



I'm an adamant believer in lecture-style events where there's perhaps a small reception after or beforehand, but **the meat of the event is information based** rather than a full-on happy hour where you're left to network and meet people... I appreciate events **where professors or leaders in various fields come together or come individually to speak about a topic that should be on everyone's mind.**

Staff Assistant, U.S. Senate (R)



I have asked [for roundtables to be put together for me] so that I can talk to industry directly. **And I get multiple perspectives from multiple companies** - so that we can understand some of the issues and improve our own processes and make it easier for industry to do business with us. **Understanding their experience in working with us is really important to us.**

Senior Staff, Government Services Administration (D)



Roundtables have been very helpful... it gives the member just a chance to hear from the audience... **the local engagement is so important because you get to see how [things] impact your constituents.** So a bill that has a price tag as big as the Farm Bill, you start off in an intimate setting with the roundtable to see how it impacts them directly. I think that's a big plus of the roundtable setting.

Senior Legislative Assistant, U.S. House of Representatives (R)

Conclusion

This report is a synthesis of the federal policy conversations that took place between February and November 2023. At Penta Policy Insiders, our one-of-a-kind, proprietary research centers the priorities of policymakers, allowing them to directly inform policy discussions and advocacy best practices.

To all our 2023 respondents, we appreciate your participation and welcome your engagement in next year's research cycle.

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Citations

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[You have] a good reputation, especially from the D.C. perspective. But also I feel like having access to resources and being able to give feedback that moves conversation is valuable... when you come to our office with a reasonable ask and understanding what we're dealing with, it's more likely that we're able to get things done... it ends up in a better place for all of us, and more actionable, which is kind of the name of the game here, to actually get things done.

Director, Executive Branch
