



CONGRESSIONAL  
MANAGEMENT  
FOUNDATION

# Building Trust by Modernizing Constituent Engagement

Part of the Congressional  
Management Foundation Series  
“The Future of Citizen Engagement”

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# About the Congressional Management Foundation

Founded in 1977, the Congressional Management Foundation (CMF) is a 501(c)(3) nonpartisan nonprofit dedicated to strengthening Congress and building trust in its work *with* and *for* the American people. Our work:

- Revitalizes Congress as an institution, working inside and outside Congress to foster a deliberative, functioning, and accountable legislature.
- Optimizes Congress by promoting best practices in congressional offices for: effective management and operations, hiring and retaining diverse and exceptional staff, and creating the foundation for a modern Congress.
- Helps Congress and the people they represent engage in a constructive and inclusive dialogue toward a thriving American democracy.

Learn more about our programs and services at <https://www.CongressFoundation.org>.

## About This Brief

While constituent expectations and technology have significantly changed in the past few decades, the procedures, metrics, and workflows in congressional offices have not. In the past few years CMF has developed a large body of research and guidance on constituent communication and engagement that has changed our advice for Congress. While answering incoming constituent mail is still important, it should be considered part of a Constituent Engagement Strategy that every office considers and adopts. This brief is designed to help offices better understand why and how to do this. For the new Members and staff of the 118<sup>th</sup> Congress, we hope you find it helpful as you establish your relationship with those you represent and that it will serve you and them well throughout your tenure. For veteran Members and staff returning to Congress for the 118<sup>th</sup> session, this guidance can help you redefine and modernize your relationship with your constituents by moving away from reactive mail management tactics to more strategic, and ultimately more successful, engagement.

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## Check Out CongressFoundation.org

The following resources—and more—can be found for free on CMF’s website to help you set up and manage your constituent engagement operation.

- **[New Member Resource Center](#)**. This section of CMF’s website connects new Members of Congress and staff with resources for setting up and running freshman offices. Resources include downloadable job descriptions, office budgets, and office manuals/procedures.
- **[Rebuilding the Democratic Dialogue](#)**. This report explores the challenges to engagement and trust between Members and their constituents; proposes principles for rebuilding that fundamental democratic relationship; and describes innovative practices Congress can look to for modernizing the democratic dialogue.
- **[What Americans Want from Congress & How Members Can Build Trust](#)**. Through a series of national polls, this report explores how offices can change their communications practices, habits, and objectives to build greater trust in the institution. It also offers a model for creating a Strategic Constituent Engagement Plan and advice for how Members can build trust.
- **[Coronavirus, Congress, and Constituent Communications](#)**. The pandemic forced rapid innovation in Congress. This report explores how Member-constituent engagement changed due to constraints imposed by the early pandemic and discusses implications of the changes.
- **[Setting Course: A Congressional Management Guide](#)**. CMF’s premiere publication is designed to help set up and manage a congressional office. Chapter 14, “Managing Constituent Communications,” provides guidance to manage incoming constituent communications efficiently so constituents feel heard and staff time is spent as strategically as possible.
- **[Keeping It Local: A Guide for Managing Congressional District & State Offices](#)**. This guide helps District and State Directors, as well as Chiefs of Staff, manage an organization spread out in multiple locations while maintaining communication networks and good teamwork, including guidance on how to create a coordinated agenda and strategically approach and manage outreach, scheduling, events, casework and projects.

*Your job isn't just to "answer the mail," it's to connect with your constituents in a way that enhances their understanding and trust in government and provides you as an elected official data and insight into how to be a more responsive and effective representative of the People.*

## Introduction

One of the omnipresent facts of congressional life is interacting with constituents by email, social media, phone, letter, individual meetings, town halls, telephone town halls or just fielding questions, concerns and complaints while standing in a grocery store line. For many Americans, engaging with Congress is as essential to democracy as voting. Past studies report that half of all voters say they have emailed their Member of Congress in the past three years. It is a way of expressing their ideas of what their government should be doing—and a Member of Congress would do well to pay attention for both altruistic and political reasons, no matter what other demands are placed on your time. After all, your job is to represent your constituents' interests in Congress.

However, those who proactively engage are far from your typical constituents. They are the people who have the knowledge, skills, culture, and time to focus on public policy at the national level. They tend to be what academics call the "elites," meaning they usually skew wealthier and more educated than your average constituent. They also tend to be more politically active and more likely to strongly agree or disagree with you and/or your party. And they're likely to be a member of an association or nonprofit, which through collective action tends to have more capacity than the typical constituent. As a result, you need to be mindful of who is engaging with you and who is not, in order to have a comprehensive and complete view of your constituents' needs and interests.

For most of our history, CMF has been working to improve communications between constituents and Members of Congress. Through our *Partnership for a More Perfect Union*; projects such as the *Future of Citizen Engagement*, *Deliberative Town Hall Meetings*, and *Communicating with Congress*; and management engagements with individual House and Senate offices, we have identified best practices to help you manage constituent engagement effectively and efficiently. The core advice is centered on this concept: do not think of constituent engagement in silos, but rather a wholistic interactive experience with broad democratic goals in mind. Your job isn't just to "answer the mail," it's to connect with your constituents in a way that enhances their understanding and trust in government and provides you as an elected official data and insight into how to be a more responsive and effective representative of the People.

# The Importance of Building Trust

No more important relationship in our democracy exists than that between Members of Congress and those they represent. Ultimately, the legitimacy of Senators and Representatives stems from your constituents. Unfortunately, in the past few decades congressional approval ratings have rarely exceeded 40%, and for much of that time ratings have been in the teens.

Despite dismal congressional approval ratings, research clearly shows that Americans value the relationship between Members of Congress and their constituents. They want to feel heard, but they do not feel Congress is listening.<sup>1</sup> They do not think government or Congress works for them. Data collected over decades indicates we are near an all-time high of Americans who believe that the government is run by big interests looking out for themselves, not for the benefit of all people. They also overwhelmingly feel Senators and Representatives: think mostly about their party, not the good of the country; do not listen to the people they represent; and would be more likely to find common ground if they were more influenced by the people they represent.<sup>2</sup> This is a lot for you to overcome.

CMF knows that Members of Congress care deeply about their constituents.<sup>3</sup> We also know that, if Members have the opportunity to have substantive, deliberative discussions with constituents, they are able to explain their views and can change constituents' minds about their handling of an issue and their performance, in general.<sup>4</sup> Similarly, we know that when constituents engage in thoughtful and civil interactions with Congress, they can influence public policy outcomes.<sup>5</sup>

The fact remains, however, that the overwhelming perception among the People is that Congress does not care about them, so they do not trust Congress to do right by them. The Legislative Branch is supposed to be close to the People; to understand and respond to their needs. But too many offices rely on reactive engagement—responses to email messages—as their primary interactions with their constituents. CMF has studied the use and effectiveness of email since 1995, and we can confidently say that neither the public, nor Members and staff, are satisfied with these interactions.

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- 1 *The Future of Citizen Engagement: What Americans Want from Congress & How Members Can Build Trust*. Kathy Goldschmidt and Bradley Joseph Sinkaus. Congressional Management Foundation, 2021. <https://www.congressfoundation.org/public-opinion-trust-2021>
  - 2 “Responding to Voters’ Dissatisfaction with Government,” Steven Kull, et. al. Program for Public Consultation, School of Public Policy, University of Maryland. January 2019. [http://www.publicconsultation.org/wp-content/uploads/2019/01/Voter\\_Dissatisfaction\\_Report\\_0119.pdf](http://www.publicconsultation.org/wp-content/uploads/2019/01/Voter_Dissatisfaction_Report_0119.pdf)
  - 3 *Life in Congress: The Member Perspective*, a joint research report by the Congressional Management Foundation and the Society for Human Resource Management, 2013. <https://www.congressfoundation.org/lic/member>
  - 4 *Politics with the People: Building a Directly Representative Democracy*, Michael A. Neblo, Kevin M. Esterling, and David M. J. Lazer. Cambridge Studies in Public Opinion and Political Psychology, 2019. <https://connectingtocongress.org/politics-with-the-people-2>
  - 5 *Citizen-Centric Advocacy: The Untapped Power of Constituent Engagement*. Bradford Fitch, Kathy Goldschmidt, and Nicole Folk Cooper. Congressional Management Foundation, 2017. <https://www.congressfoundation.org/citizen-centric-advocacy-2017>

Just as Congress changed in the last century and learned how to perform in front of the television camera in order to connect with the public, Congress must make a similar transformation in this century. Rather than finding a new way to broadcast their message to win over an electorate, this new environment offers Congress a way to do something even more important in a democracy: build trust. The question every Member of Congress—indeed every elected official—now faces is whether they will walk through that door, enter the new environment and meet the new demands of an engaged citizenry. Those that do will win more than votes, they'll win the hearts, minds, and trust of the People they serve.

## Rebuilding Trust in Congress Requires New Approaches

The [Partnership for Public Service](#) recently completed extensive research on how to rebuild trust in Congress. This work resulted in a communications toolkit entitled “Renewing Hope and Trust in Congress,”<sup>6</sup> which can help those who work with and for Congress reconsider how they talk about the institution and politics as they go about their important work. The principles they advise are to:

- Serve the People First
- Represent Everyone
- Work Together
- Put People in the Picture—And Connect them to Congress

The toolkit contains compelling data and fascinating quotes to support their guidance as well as actionable information on how to integrate the principles into your work.

Another helpful resource for rethinking constituent communication and engagement is the [Project on Ethics in Political Communication](#) at the School of Media and Public Affairs at The George Washington University. Check out their campaign ethics workbook “Don’t Lose Your Soul Just to Win an Election,”<sup>7</sup> which applies to official as well as campaign communications.

The words and tone your office use when talking about public service, Congress, colleagues, and democracy have tremendous impact on your constituents’ views. Be authentic but think about how you can make your points without denigrating the institution and eroding trust. Build trust instead.

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6 “Renewing Hope and Trust in Congress,” Partnership for Public Service and Hattaway Communications, 2022. <https://ourpublicservice.org/wp-content/uploads/2022/06/Partnership-for-Public-Service-Comms-Toolkit-6.27.22.pdf>

7 “Don’t Lose Your Soul Just to Win an Election,” Peter Loge, Project on Ethics in Political Communication, The George Washington University, 2021. <https://ethicsinpoliticalcommunication.org/campaign-ethics-workbook>

So how do you do it? You start by using your limited resources to engage strategically with your constituents in ways that build trust in you, Congress, and democracy. There is strong evidence that robust, inclusive, deliberative public engagement produces significant public policy benefits. It has been shown to increase the legitimacy of decisions, enhance public trust in government, strengthen the integrity of leaders, and

*There is strong evidence that robust, inclusive, deliberative public engagement produces significant public policy benefits. It has been shown to increase the legitimacy of decisions, enhance public trust in government, strengthen the integrity of leaders, and help counteract polarization and disinformation.*

help counteract polarization and disinformation. These benefits are especially seen when public engagement is integrated into public policy processes and facilitated by governance officials rather than through *ad hoc* processes external to governance.

Following is some of the key advice for building trust CMF has developed through recent research combined with our decades of studying and helping congressional offices better engage with constituents.

## **1. Listen, Affirm, and Connect.**

Nearly 60% of voters surveyed said it would be “very valuable,” and another 28% said it would be “somewhat valuable,” for a response to an email they’d sent to a Senator or Representative to include confirmation that their views had been heard, communicated to the Member, and taken into account.<sup>8</sup> To do this, Senators, Representatives and their staffers must listen. There are, of course, political and electoral reasons to deliver the Member’s message, talking points, and accomplishments. But there are representational, democratic, and legislative reasons to hear what constituents have to say and *affirm* that you are listening. Members of Congress and their staffs also must integrate what they learn into decisions and public policy. By communicating to constituents their voices are heard, politicians can demonstrate they have built a connection between the People and the Congress.

## **2. Provide New Opportunities to Engage.**

Before the COVID pandemic, voters indicated preference for in-person venues to enable Members of Congress to listen to their constituents. But they expressed interest in other formats, as well. Since the pandemic accustomed everyone to remote work and engagement, there is increased interest in remote and asynchronous opportunities. The key is to be both creative and strategic. Consider your goals and your constituency to determine how best to engage. Use the tools available to you, including technology and

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<sup>8</sup> *The Future of Citizen Engagement: What Americans Want from Congress & How Members Can Build Trust.* Kathy Goldschmidt and Bradley Joseph Sinkaus. Congressional Management Foundation, 2021. <https://www.congressfoundation.org/public-opinion-trust-2021>



online platforms, but also think about how they can be used differently to better meet the needs of both the Senator/Representative and constituents. Remember that building trust and serving constituents are the ultimate goals and that the Member represents everyone who lives in the district/state, regardless of whether or not they agree politically. Hearing from a representative sample of constituents (or a close proximate), and asking questions that are not leading, will help gain a less biased picture of the needs, interests, and expectations of the broad spectrum of the district/state. Yet, it requires proactive outreach and concerted effort to do so. Reactive engagement tends to result in hearing only from those who are most politically active and most likely to agree or disagree with the Senator/Representative. It takes creativity to hear from those who are less inclined to reach out, but possibly more in need of the Member's attention.

### **3. Help Constituents Understand Congress.**

It is a common lament that civic education seems to have fallen by the wayside, leaving Americans with a lack of understanding of, or appreciation for, democratic processes, Congress, and civic engagement. While educational institutions bear the bulk of this responsibility, helping constituents better understand Congress and the Senator/Representative can go a long way toward building trust. This can include considering, as part of each engagement, what constituents might need to know to best participate. They almost certainly will not benefit from a detailed dissertation on the legislative process or the minutiae of an issue, but they might need some basic and brief information to make the interaction successful. Consider how your office can make it easier for constituents to provide what the office needs. For example, focusing on a single issue in a town hall meeting and providing some information ahead of time can help constituents feel more prepared and focused. Brief phone calls with “pen pals/frequent fliers” every once in a while can help them feel heard and guide them toward more productive engagement in the future. And providing a little insight into how Congress works during a local speech can help the Member connect with constituents and educate them at the same time.<sup>9</sup>

### **4. Let Staffers Come Out from Behind the Curtain.**

Most congressional offices approach constituent engagement as though the Member is performing all the work of the office and staff are merely dutiful subordinates. All responses go out with the Member's signature. All meetings are with the Member until they are delayed by votes or competing meetings. All appearances are by the Member until a surrogate is apologetically offered. But what would happen if staffers were presented to constituents as the critical cogs in the wheels of democracy they truly are? When staff are empowered to respond to constituents—*when appropriate and with clear guidance*—under their own signatures on matters within their purview, those engagements help build relationships rather than serving as mere transactions. Of

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<sup>9</sup> Examples of offices providing exemplary constituent service can be found in CMF's Democracy Award winners and finalists. Those in the “Constituent Service” category are especially relevant, but there are also good practices in the “Transparency and Accountability” and “Innovation and Modernization” categories. <https://www.congressfoundation.org/democracy-awards>

course, empowering staffers in these ways requires considerable trust on the Member's part and considerable planning and training to ensure staffers engage appropriately and reflect well on the Member.

## A Master Class on Public Engagement

If you're interested in learning about next-level public participation and engagement, here are some resources to start with.

- ***Global Parliamentary Report 2022: Public Engagement in the Work of Parliament.***<sup>10</sup> The [Inter-Parliamentary Union](#) conducts periodic research with its member parliaments and reports on important trends. This report focuses on engagement and is chock full of information about why engagement matters, how parliaments are engaging, and lessons to glean from current practices.
- ***Innovative Citizen Participation and New Democratic Institutions: Catching the Deliberative Wave.***<sup>11</sup> This 2020 report by [OECD](#) and its supporting documents and toolkits provide a detailed look at efforts around the world to engage the public in policy decision-making. It describes trends, evidence for what success looks like, and guidance for integrating public engagement into legislative processes.
- ***Politics with the People: Building a Directly Representative Democracy.***<sup>12</sup> Through years of collaboration with CMF and House and Senate offices, the authors found strong evidence for constituent engagement practices that benefit Members and constituents, build trust, and lead to better policy outcomes. We're still working with these researchers, so if you would like to be involved in innovative engagement, let us know!
- ***Public Participation for 21st Century Democracy.***<sup>13</sup> This textbook offers pragmatic guidance about how and why to incorporate public participation into policymaking. One of its co-authors, [Matt Leighninger](#), also founded [Participedia](#) to make timely knowledge and learning about public participation more accessible.

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10 *Global Parliamentary Report 2022: Public Engagement in the Work of Parliament*, Inter-Parliamentary Union and United Nations Development Programme, 2022. <https://www.ipu.org/our-impact/strong-parliaments/setting-standards/global-parliamentary-report/global-parliamentary-report-2022-public-engagement-in-work-parliament>

11 *Innovative Citizen Participation and New Democratic Institutions: Catching the Deliberative Wave*, OECD, 2020. <https://www.cambridge.org/core/books/politics-with-the-people/B2011CAA9B624EB366474F46609A4A9A>

12 *Politics with the People: Building a Directly Representative Democracy*, Michael A. Neblo, Kevin M. Esterling, and David M. J. Lazer, Cambridge Studies in Public Opinion and Political Psychology, 2019. <https://connectingtocongress.org/politics-with-the-people-2>

13 *Public Participation for 21st Century Democracy*, Tina Nabatchi and Matt Leighninger, 2015. <https://onlinelibrary.wiley.com/doi/book/10.1002/9781119154815>

# 10 Principles for Robust Citizen Engagement

In our report *The Future of Citizen Engagement: Rebuilding the Democratic Dialogue*, CMF offered 10 principles to modernize and revitalize the relationship between Americans and Congress, many of which have since been adopted as recommendations by the Select Committee on the Modernization of Congress. Some of them can be implemented by your office, others must be implemented by Congress as an institution, and others still must be implemented by the organizations and individuals who engage with Congress. Together they offer a way to shift citizen engagement away from the transactional, bureaucratic processes currently used in most congressional offices, toward processes that facilitate more robust and meaningful participation in the work of Congress.

## 1. Congressional engagement should foster trust in Members, Congress, and democracy.

Democracy cannot flourish if, as at present, Congress and the People are skeptical, dismissive, or mistrustful of one another. In addition to the guidance in the previous section, some things you can do to foster trust are to avoid disparaging Congress and colleagues to score political points, be authentic, and demonstrate accountability in as many ways as possible.

## 2. Congress should robustly embrace and facilitate the People's First Amendment Rights.

The freedoms of assembly, speech, and the press are well understood. The right to petition government for a redress of grievances, less so.<sup>14</sup> Congress bears considerable responsibility for all of them. One way to do this is to acknowledge that advocacy campaigns and special interest groups are important aspects of free speech, assembly, and petition, even if you don't agree with them or their tactics.

## 3. Congress must collect, aggregate, and analyze meaningful knowledge from varied sources.

Email is the predominant channel for information to flow to Congress, but it is unwieldy to manage, sort, and extract insight from. Congress needs better tools

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14 "Petitioning and the Making of the Administrative State," Maggie Blackhawk, *Yale Law Journal*, Volume 127, Issue 6, Article 2, 2018. <https://ssrn.com/abstract=3150671> For additional recent scholarship on the petition, see also "Lobbying and the Petition Clause" (Blackhawk, *Stanford Law Review* 2016) <https://ssrn.com/abstract=2762012>, "Congressional Representation by Petition: Assessing the Voices of the Voteless in a Comprehensive New Database, 1789-1949" (Blackhawk, Carpenter, et. al. *Legislative Studies Quarterly* 2020) <https://doi.org/10.1111/lsq.12305>, *Democracy by Petition: Popular Politics in Transformation, 1790-1870* (Carpenter 2021) <https://www.hup.harvard.edu/catalog.php?isbn=9780674247499>, and "The Popular Origins of Legislative Jurisdictions: Petitions and Standing Committee Formation in Colonial Virginia and the Early U.S. House" (Schneer, Resch, et. al. *Journal of Politics*, forthcoming 2021) <https://dcarpenter.scholar.harvard.edu/publications/popular-origins-legislative-jurisdictions-petitions-and-standing-committee>.

to integrate and aggregate the information it receives to make good public policy decisions. Consider convening local subject matter experts for roundtable discussions of issues and legislation or partnering with local colleges and universities to help aggregate knowledge and inform your policy decisions.<sup>15</sup>

## The Little-Known but Fascinating Right to Petition

Confused about how sending huge batches of identical form email messages to every House and Senate office became the embodiment of the right to petition Congress? We were, too, so we consulted the work of legal scholar Maggie Blackhawk to learn more.

It turns out that for its first 150 years or so Congress—especially the House of Representatives—had a robust process to enable the People to address their concerns at the chamber level rather than through their own Senators or Representative. This allowed issues to be raised by people who otherwise would not have been heard from, including political minorities and those without the right to vote. It required at least one Member to introduce a petition to the House or Senate, but it didn't require all of them to receive and respond to every single constituent signatory of every single petition.

To learn more about this little-understood and now vestigial practice, see "[A Brief History of the First Amendment Right to Petition](#)"<sup>16</sup> on our website. And if you're interested in how we feel this applies to grassroots advocacy, see "[Are You a Threat to Democracy?](#)"<sup>17</sup> Learn more about why it matters in "[Practices on both sides of Member-constituent engagement are facilitating bureaucracy, not democracy.](#)"<sup>18</sup>

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15 The SIDE framework—the concept of ensuring that Stakeholders, Individuals, Data, and Evidence are all included and taken into account in the public policy process—was proposed by the Subcommittee on Congressional Technology and Innovation ([https://www.congressfoundation.org/apsa\\_technology\\_innovation](https://www.congressfoundation.org/apsa_technology_innovation)) of the American Political Science Association's Congressional Reform Task Force. The concept was described in more detail by Marci Harris, Claire Abernathy, and Kevin Esterling, the co-authors of the subcommittee report (<https://medium.com/g21c/the-side-framework-fc125af9b508>), and further developed by Lorelei Kelly in a working draft of a paper entitled "Civic Voice and Congressional COVID-19 Response: How members of Congress Can Lead SIDE Hearings in their Districts," 2020, Beeck Center for Social Impact and Innovation at Georgetown University. <https://beeckcenter.georgetown.edu/wp-content/uploads/2020/05/Civic-Voice-Pathway-Series-SIDE-Hearing.pdf>

16 <https://www.congressfoundation.org/right-to-petition>

17 <https://www.congressfoundation.org/threat-to-democracy>

18 <https://www.congressfoundation.org/facilitating-bureaucracy>

#### 4. **Senators and Representatives should strive to engage with a diverse sample of their constituents, not just those who vote for them or seek to influence them.**

Focusing only on the political base or on those who reach out leaves many voices and experiences out of public policy. Being inclusive is both good politics and good governance. Consider specifically reaching out to those who are disengaged or who disagree with you to hear what they have to say. Strategic and proactive scheduling to ensure you broadly and inclusively engage can also help. And you can also convene a small, but representative and transparent, group of constituents to serve as a citizens' panel of advisors.

*Focusing only on the political base or on those who reach out leaves many voices and experiences out of public policy. Being inclusive is both good politics and good governance.*

#### 5. **Congress should provide additional and varied avenues for public participation.**

As a result of vast differences in geography, connectivity, age, income, knowledge, and skill that exist in our nation, phone calls, emails, social media, postal mail, in-person visits, and possibly even telegrams still need to be welcomed by Congress, even once better venues for public participation are created. Your constituent engagement practices should be able to handle whatever comes your way and also be creative about how you proactively engage.

#### 6. **Congressional engagement should promote accessibility for all.**

When we rely predominantly on one mode of communication—whether it be online or in-person—we make it impossible for some people to participate, often those who have been historically silenced and disenfranchised from our democratic traditions.<sup>19</sup> Create a culture of accessibility in your office and try not to rely too heavily on a single venue for engagement. Some creative outreach tactics and using tools that enhance accessibility, like translation and captioning, can also go a long way toward being more inclusive.<sup>20</sup>

<sup>19</sup> For additional recent scholarship on the petition, see also “Lobbying and the Petition Clause” (Blackhawk, *Stanford Law Review* 2016) <https://ssrn.com/abstract=2762012>, “Congressional Representation by Petition: Assessing the Voices of the Voteless in a Comprehensive New Database, 1789-1949” (Blackhawk, Carpenter, et. al. *Legislative Studies Quarterly* 2020) <https://doi.org/10.1111/lsg.12305>, *Democracy by Petition: Popular Politics in Transformation, 1790-1870* (Carpenter 2021) <https://www.hup.harvard.edu/catalog.php?isbn=9780674247499>, and “The Popular Origins of Legislative Jurisdictions: Petitions and Standing Committee Formation in Colonial Virginia and the Early U.S. House” (Schneer, Resch, et. al. *Journal of Politics*, forthcoming 2021) <https://dcarpenter.scholar.harvard.edu/publications/popular-origins-legislative-jurisdictions-petitions-and-standing-committee>.

<sup>20</sup> Section 508 of the Rehabilitation Act of 1973 requires Federal electronic and information technology to be accessible to people with disabilities. While Congress is not legally required to comply with this law, it is morally obligated to do so.

**7. While individual Members should prioritize engagement with their own constituents, Congress should develop additional venues for public policy participation and engagement.**

Senators and Representatives are elected to represent specific people but requiring individual lawmakers to be the conduits for all communications to Congress is inefficient and causes important voices to be lost or ignored. You need to focus on your constituents and develop tactics and opportunities to reach as many as possible but consider advocating for ways to facilitate engagement more broadly in the work of Congress as other legislatures do.

**8. The People should be honest and transparent in their engagement with Congress.**

When seeking a redress of grievances in a court of law, there is no expectation for anonymity and attempts to provide false information or overwhelm the court are punished. The same should be true for seeking redress of grievances in Congress. Consider challenging grassroots organizations using questionable practices in their engagement with you. You might also develop standard questions to ask of anyone who advocates or lobbies with your office about who specifically they represent in your district/state and who funds their campaigns and advocacy.

**9. Constituent advocacy must prioritize content and quality over medium and quantity.**

Both Congress and the organizers of grassroots campaigns are stuck with an antiquated belief that the best way to demonstrate broad support for an issue is to send as many emails as possible to as many Members of Congress as possible. Our future engagement tactics should facilitate the substantive and minimize the administrative. Consider steering constituents and advocates toward better ways of engaging, possibly by highlighting those who do it well and providing guidance to those who do not.

**10. Input from the public should be integrated with other sources of information for Congress to make good public policy decisions.**

Public sentiment is important in public policy decision-making, but it must be combined with and balanced against the experiences of stakeholders affected by, data relevant to, and expert opinion on specific public policies. Use the Congress-specific resources available to you—including CRS, CBO, and GAO—and train staff to supplement information from lobbyists and the Executive Branch with other research. Local colleges, universities, and civil society organization can be excellent resources, as well.

These principles offer a foundation for engaging the People in a way that can begin to transcend partisanship and reset the conversation to more substantive, meaningful engagement. To make this transformation to a modern Congress, however, it will take

a radical shift in thinking. Politicians must realize the 21<sup>st</sup>-century American citizenry demands more than an answer to an email four to eight weeks after it was sent. It demands acknowledgment that their voices are heard and that they matter. It demands robust opportunities to engage with those people elected to govern the nation, and it demands that engagement happen in the most convenient way possible.

## **CMF's Guidance to Citizen-Advocates**

CMF works with both sides of constituent engagement. Through our [\*Partnership for a More Perfect Union\*](#) we seek to foster the genuine and effective exchange of ideas between Members of Congress and citizens. We accomplish this by conducting research and education, promoting best practices, and creating innovative tools for everyone with a stake in our democracy.

The need for this is evident. Citizens are increasingly disillusioned with Congress, many believing their voices are not being heard. Congress is challenged by the sheer volume of communications from constituents that have created an administrative burden without improving policy or constituent relationships and service. The combination of these and other factors threatens some of the core precepts and practices our nation was founded upon.

Our strategy is to be a bridge between citizens and Congress. We work with citizens to help them communicate more effectively with their Members of Congress, and we work with Congress to communicate more effectively with constituents. When we succeed, Congress can better listen and understand and makes better laws.

# Create a Strategic Constituent Engagement Plan

We believe offices and their constituents are best served by creating a constituent engagement plan that allows them to be in charge of their message and demonstrate to constituents that they are listening and accountable. Developing such a plan should involve communications, legislative, and district/state staff. After all, the end user is always the constituent, so it is important to coordinate efforts and messaging to define and accomplish your goals. The following is a process you can use to develop a Strategic Constituent Engagement Plan that builds trust with, and better engages, constituents.

## 1. Define the Senator's/Representative's Strengths and Preferences

Members of Congress are as varied as the people they represent, and not all are equally good at all forms of communication. To build trust with constituents, Members need to be comfortable so they can convey authenticity and better connect with the people they are engaging. Sometimes comfort will come with practice or training on the part of the Member and/or the staff who support them. In developing a Strategic Constituent Engagement Plan, it is important to answer the following questions about the Member's strengths and preferences:

- Is the Senator/Representative comfortable speaking before large groups? Or do they prefer smaller groups?
- Is the Senator/Representative comfortable speaking on camera? On the phone?
- Is the Senator/Representative comfortable talking with reporters? Do they need a lot of preparation or can they respond in the moment?
- Is the Senator/Representative comfortable engaging with those who disagree with them and those who do not normally interact with politicians? What will it take to prepare them to engage with those who are not supporters and “usual suspects?”
- Will the Senator/Representative draft their own social media content and have staff review before posting? (CMF recommends a second pair of eyes review anything public, even when it's written by the Senator/Representative.) Are they confident in allowing staff to post content in their voice without their review? What policies and training must be in place for them to be comfortable with staff posting?
- Is the Senator/Representative comfortable operating computers and technology on their own or do staff need to provide hands-on support?
- What tone and voice does the Senator/Representative want to convey in written materials? Will they vary depending on the medium or platform?
- What are the Senator's/Representative's preferences for preparation and talking points?



- What is the impression the Senator/Representative wants to leave with constituents and how best can that be conveyed? Do they want to come across as authoritative, friendly, compassionate, partisan, statesmanlike, disruptive, etc.?
- What role does the Senator/Representative most want to play in Congress and how can constituent engagement support that?<sup>21</sup>

## 2. Understand Your Constituents

To connect with constituents, you need to understand who they are and what they want from their engagement with the Senator/Representative. This involves more than intuition and assumptions. It involves research about the district/state and clarity about who the Member believes they represent. It also involves asking constituents. Often a constituent’s interaction with a congressional office ends when a meeting ends or the office replies to a call, letter, or email. But how do constituents view these interactions and what is their overall satisfaction with the office? By inviting feedback after an interaction, offices can better understand what influences constituents’ satisfaction and trust.<sup>22</sup> Moreover, marketing research suggests that seeking feedback, in itself, improves satisfaction.<sup>23</sup> However you collect the information, some of the key questions to answer about your constituents are:

- Will the office conduct—or has the office conducted—constituent surveys to determine: policy issue interests; constituent satisfaction with casework, mail/ email responses, and other engagement practices; or preference for type and timing of engagement with the office? Pay attention to who responds and what the results tell the office.
- Will the office collect—or has the office collected—data and analyzed trends in who is reaching out, who is requesting assistance, who is attending meetings and events, and who the office is proactively engaging? What does this information tell you? Who is the office hearing from most and not hearing from at all?
- What are the trends in open, click through, and forward rates of different email responses and outreach? What can your website and social media analytics tell the office?
- What are the demographics and key elements of the district/state? What are the implications of average age, education level, income, race/ethnicity, employment bases (i.e., agriculture, military, heavy industry, professional services, etc.),

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21 See chapter 9 of *Setting Course: A Congressional Management Guide*, “Defining Your Role in Congress,” to learn more about the different roles Senators and Representatives play in Congress (<https://www.congressfoundation.org/setting-course>). CMF’s “Job Description for a Member of Congress” also provides information to help Members consider the emphasis they will place on different aspects of their job. <https://www.congressfoundation.org/member-job-description>

22 On our website, CMF provides guidance and insight based on the experiences of offices who have conducted customer satisfaction surveys with their constituents. <https://www.congressfoundation.org/constituent-satisfaction>

23 “How Surveys Influence Customers,” Paul M. Dholakia and Vicki G. Morwitz, Harvard Business Review, May 2002. <https://hbr.org/2002/05/how-surveys-influence-customers>

urban/suburban/exurban/rural mix, political ideological breakdown, computer and broadband access, etc.?<sup>24</sup>

- Who are the key stakeholders and constituencies in the district/state?
- Has the office sought engagement and/or feedback from a representative sample of constituents or reached out to groups and individuals who do not normally engage? What have you learned?

### 3. Establish Protocols to Assess Your Practices

Most offices handle constituent engagement in a reactive way, with the vast majority being conducted through responses to constituent correspondence. In many offices, managing constituent correspondence represents about 50% of office resources, but is the value to constituents, the Member, and democracy commensurate with the effort required? Are the responses facilitating trust, demonstrating accountability, and affirming the Senator/Representative is listening? Are there ways to engage constituents that are more satisfying and more productive for everyone and better for democracy? To determine the answers to these questions, it is important to think about how you will assess your practices on a regular basis. Following are questions to help do that.

- What methods of engagement does the office use? How does each perform in a Constituent Engagement Assessment (see worksheet on the next page)?
  - Reactive email, phone calls, and mail
  - Targeted mailings, including newsletters (paper or electronic)
  - Constituent satisfaction surveys
  - Website
  - Ads
  - Town hall meetings—in person or virtual
  - Meetings and events hosted by the office
  - Meetings and events by invitation
  - Facebook
  - Instagram
  - Twitter
  - Reddit
  - YouTube
  - Advisory groups
  - Others?
- How and how often will the office review open rates for email responses, e-newsletters, and other targeted emails? Will the office test different subject lines and delivery days and times to see if it would improve open rates? What seems to be most effective? Are there ways to make them more engaging and interactive?

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<sup>24</sup> Most of this information can be found in the *Almanac of American Politics* ([https://www.thealmanacofamericanpolitics.com/index.aspx?gclid=CjwKCAiA-f78BRBbEiwATKRRBMZguxRaPdm5C9oMyMbDhYMhhsH4WL2BLcnLJgp4CKPBRkYb7qSI5xoCsiwQAvD\\_BwE](https://www.thealmanacofamericanpolitics.com/index.aspx?gclid=CjwKCAiA-f78BRBbEiwATKRRBMZguxRaPdm5C9oMyMbDhYMhhsH4WL2BLcnLJgp4CKPBRkYb7qSI5xoCsiwQAvD_BwE)). The Census Bureau also generally produces helpful district (<https://www.census.gov/mycd/>) and state (<https://www.census.gov/quickfacts/fact/table/US/PST045219>) profiles.

# Constituent Engagement Assessment Worksheet

**Instructions:** Place each constituent engagement method your office uses—or is considering—on a row below (add pages as necessary or use the [Excel workbook version](#) provided on CongressFoundation.org). Include the different social media platforms, proactive events and mailings, responses to constituents, town hall forums, etc. If you would like to explore potential new methods, include those, as well. Then rate each on a scale of 1-5 with 1 being lowest and 5 being highest. Determine ahead of time what metrics your office will use for each (What, specifically, does a 1 stand for? What does a 5 stand for?) and whether any of the criteria should be weighted. We have provided an example in the first row below.

Engage-ment Method	Number of Constitu-ents Reached	Quality of Interaction	Reach Beyond Base	Staff Effort Required	Meets Constituent Preferences*	Cost	Plays to Member's Strengths	Score	Advantages	Disadvantages
Example: Tweet	Unknown	2	2	1	1	1	4	11	<ul style="list-style-type: none"> <li>May reach reporters &amp; thought leaders</li> <li>Member's social media presence is strong</li> <li>Free and easy</li> </ul>	<ul style="list-style-type: none"> <li>Unknown how many followers are constituents</li> <li>Low quality constituent interaction</li> <li>Does not reach beyond the base</li> </ul>

\* Best defined by constituent satisfaction surveys or other research, not by intuition.

- When will the office review how much it has spent on constituent engagement (mass mail production and postage, telephone and online town hall meetings, advertisements, travel, etc.)? Is there room in the budget to increase spending? Is current spending meeting goals and helping connect to constituents? Where is current spending leading to gaps in engagement?
- How will the office identify and shift resources from activities which do not engender trust (e.g., responding to identical mass email campaigns, or postal mailings with limited public policy substance) to those which are more likely to engender trust (e.g., online town hall meetings with independent moderators)?
- How will the office assess how much staff time is spent on different communications and engagement methods? Can time be allocated elsewhere or from less productive to more productive methods?
- How will you assess what tone is conveyed through your constituent engagement practices, and is it the tone you want to convey?
- How will you assess who are you hearing from and not hearing from? How will you determine whether changes need to be made?
- How will you assess whether your practices are helping to achieve the Senator's/ Representative's strategic goals?
- How will you assess whether your practices demonstrate the Senator/ Representative is listening and accountable to constituents? Are they helping to foster trust in the Member and in democracy or are they largely political and/or technical, focusing on the minutiae of legislation?

#### 4. Develop a Strategic Constituent Engagement Plan

Once you have a handle on how you will evaluate and adapt your practices to ensure they are working effectively for the Senator/Representative and constituents, you can develop a six-month to one-year Strategic Constituent Engagement Plan. As you do so, it is important to remember that a high percentage of constituent engagement is reactive. Offices will always need to manage constituent mail, answer the phones, intake casework requests, and respond to meeting and event invitations, so a plan needs to take this into account. If you are too ambitious with proactive strategies, the plan is likely to fail due to lack of Member and staff time and resources. However, the plan can and should address how to make the reactive engagement more satisfying and productive for both the Member and constituents.<sup>25</sup> In developing a strategic engagement plan, offices should answer the following questions.

- Who should take the lead and be involved in developing the plan? How will you ensure that the D.C. and district/state staffs are coordinated and working toward the same goals?

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<sup>25</sup> CMF provides guidance on developing a coordinated agenda in *Keeping It Local: A Guide for Managing Congressional District & State Offices* that may be useful to offices as they develop a strategic communications plan. <https://www.congressfoundation.org/keeping-it-local>

- Are there specific upcoming initiatives, issues, or bills on which the Senator/ Representative will want constituent feedback, assistance, or support?
- How will the plan support the Senator's/Representative's goals, engage constituents in ways that build trust, and ensure constituents' views and needs are represented in public policy?
- How will the office reduce time and resources spent on less productive engagement methods and increase time and resources for more productive ones? How will you get the Member, staff, and constituents on board?
- How will the office determine the venues, processes, logistics, and content of the various communications and engagements?
- What policies, deadlines, and expectations need to be developed and communicated to staff to ensure the plan is successful? Will staff require training or assistance?
- If you are changing or deprioritizing certain practices, how will you manage constituent expectations during and after the change?

## **5. Assess the Results and Revise the Plan**

To ensure the Strategic Constituent Engagement Plan is successful, it should be regularly reviewed, assessed, and revised to respond to changes in the environment, feedback from constituents, changes in staffers, and unanticipated occurrences. Be sure to involve staff with different roles in constituent engagement, generate buy-in and approval from the Senator/Representative, and communicate any changes in strategy or policy to all staff. To help assess the results and determine if revisions are necessary, answer the following questions.

- What metrics will you track and how will you collect Member, staff, and constituent feedback to inform revisions?
- How often will you review reports on the communications plan (weekly? monthly?)? Who will create and distribute them? Who will review them?
- What processes will you use to adapt the plan based on what the metrics and feedback tell you?
- What has changed in the local, state, and national environment that could impact how the office engages constituents?
- Is the plan helping to foster constituent trust and better inform the Member, staff, and public policy about constituent views and needs?

# Streamline Your Reactive Engagement

Even with a proactive and robust Strategic Constituent Engagement Plan, your office will still receive an abundance of incoming messages from every conceivable channel that need to be managed and processed. The key is to keep it from being all-consuming so both the Member and staff can spend as much time as possible on strategic priorities.

Form email advocacy campaigns generated primarily by trade associations and nonprofits represent 70%-90% of the messages every Senator and Representative currently receives from their constituents, and they seldom provide substantive input into policy debate and decisions. In a CMF poll of grassroots advocacy professionals in the association, nonprofit, and corporate community, 79% of the respondents said that mass email campaigns are the “primary” strategy they employ to contact Members of Congress.

However, only 3% of congressional staff surveyed said that mass email campaigns have “a lot” of influence on an undecided lawmaker. They can help provide Members with support for decisions they have already made, and they sometimes raise awareness of issues that might otherwise be ignored, but they seldom persuade lawmakers to change their minds. Yet tracking and responding to them offers an important opportunity to provide a service, build relationships, and demonstrate that you are listening. CMF has spent the better part of our 45-year existence helping congressional offices walk the fine line between being responsive and letting reactive engagement consume their time and resources, and we have a great deal of advice for offices. Following are the highlights.

## Establish Response Policies

You can control how you will respond to the deluge of incoming messages and requests, but you need to establish clear policies and expectations and communicate them to staff. When establishing your office’s mail policies, consider:

- **The purpose of responding.**

What do constituents really want when they contact their Member? *They want to know that they have been heard and that their views matter.* Focus on connecting with constituents, not on persuading them to change their opinion or

### More Information

The following pages are adapted from “Chapter 14: Managing Constituent Communications,” of [\*Setting Course: A Congressional Management Guide\*](#) to provide you with the some of the strategic considerations of your reactive constituent engagement. That chapter also provides detailed guidance on CMF’s Model Mail System, referenced later in this section. We urge you to consult that chapter and [\*Keeping It Local: A Guide for Managing Congressional District & State Offices\*](#), which focuses extensively on strategic constituent engagement. Both of these guidebooks are available in PDF for free on our website at [CongressFoundation.org](https://CongressFoundation.org).

describing every action you've ever taken on the issue. Approach your constituent communications as an opportunity to demonstrate you are listening.

- **Quality of replies.**

Can you respond in one page? Can you feel responsive enough with a short “thank you for your views”? Do you need to draft both pro and con letters? In our “on demand” society, most constituents would rather receive a short, prompt response than wait weeks for a long, detailed one. We recommend demonstrating you're listening with a response that is as brief and easy to produce as possible.

- **Desired turnaround.**

Will you attempt to respond within 24 hours of receiving each message? Two weeks? Perhaps four weeks will satisfy you? In CMF's experience, many Members promote a particular turnaround goal and are shocked to find many messages go unanswered for three months, six months, or even longer. For most offices, acceptable and achievable average turnaround goals are less than one week for responses using pre-approved language and two to four weeks for those requiring new text to be drafted and approved.

- **Which messages you will answer.**

You can reduce the load by responding to only certain messages. Most Members answer only those from their districts or states. What about petitions? How about a batch of letters from school children? Comments on social media? Form advocacy campaigns based on misinformation? Will they get the same attention as other messages? Which categories should be answered in the DC office and which in the district/state? How will phone calls be handled? How should you handle constituents who contact you multiple times through multiple methods?

- **Degree of Member involvement.**

Member involvement may have a positive effect on quality, but it may dramatically increase response times. In addition, extensive involvement in reactive engagement may distract from the functions only a Member can perform. In CMF's experience, many freshmen feel a moral obligation to personally read every message and review each response. This sentiment is easy to understand, but is simply not pragmatic. A major staff complaint is that a Member's inbox can become a “black hole” for responses awaiting approval. It is a better use of the Member's time to get involved strategically, such as determining the response for a particularly sensitive issue or high-priority topic, and leave the proofreading to others.

- **Involvement of the communications staff.**

In most offices, legislative staff oversee constituent correspondence while communications staff handle media and outreach. However, by coordinating these teams, the office can develop common messages and talking points that, once approved, can be repurposed for a variety of uses: responses to constituents,

phone campaigns, the website and social media, and so on. This ensures consistency (in tone, language, and position) and reduces drafting and approval time. It can also help ensure responses to constituents are high-value and not too detailed. A few offices have even changed their organizational chart to have the Communications Director—instead of the Legislative Director—oversee all aspects of constituent communications.

- **Correspondence format standards.**

Establish a sensible response length: one page or less is usually sufficient, especially for email responses. Use a consistent, standard salutation and closing. Create a standard layout (indentation, spacing, margins, etc.) and adhere to it. In addition, the speed of your replies can be increased if you develop a clear and replicable formula for crafting responses to various types of constituent messages. Responses discussing specific legislation might include a brief status update on the legislation and whether the Member is a cosponsor while responses on general issues might include one or two examples of legislative action the Member has taken in those areas. The goal is to develop reusable templates to the greatest extent possible.

## Implement the CMF Model Mail System

Developing a systematic approach to responding to constituents is essential. If your office has only one function governed by strict standard operating procedures, it should be responding to constituents. The diverse nature of Congress assures that every office's response system will be slightly different, but there are some basic concepts that can guide you:

- **Timeliness is of the utmost importance.**

In our experience, a quick response matters more to constituents than a thorough one. Far more complaints are lodged regarding the length of time it took to receive a reply than the actual content of the response. Seriously consider eliminating any steps in your system that do not directly contribute to responsiveness or accuracy.

### The CMF Model Mail System

The CMF Model Mail System is a two-track affair that permits a mature office to respond to 85% of incoming messages with pre-approved form responses in less than one week. Many offices are able to respond within 24 hours, demonstrating responsiveness to constituents. The remaining 15% of incoming messages is assigned to a staffer and usually can be answered in one to two weeks, depending upon the priority the office assigns to responses, the amount of research required, and whether unusual events are generating higher than average volume.

To learn more about how the system works, please see Chapter 14 of [Setting Course: A Congressional Management Guide](#), available for free on our website at [CongressFoundation.org](http://CongressFoundation.org), where we describe it in great detail.



- **Establish a goal of answering 85% of the mail with form responses.**

Some new Members feel they are somehow cheating constituents if they send form letters. Consider, however, that if your response is sufficient for one person, then it is good enough for others. With House Members representing 760,000 people on average and state populations varying widely, it is just not feasible to answer every letter with an original response. The other 15% represents mail on new issues. Write responses that are authentic and responsive, but more general in nature so they can be used again, without alteration, the next time a message is received on that subject. In other words, every response is a potential form response. This practice saves enormous amounts of time for both those writing text and those approving the text.

- **The system should be as simple as possible.**

It should minimize detours and duplications, with mail passing through as few hands as possible. The four most important ways of simplifying the system are to: 1. Never write a new response when an existing one will do; 2. Route all messages for which there are pre-approved responses to a single staffer (the Mail Manager); 3. Limit the number of reviewers of new text to one or two; and 4. Automate as much as possible using the helpful features in your Correspondence Management System (CMS)/ Constituent Services System (CSS) software.

- **Treat response backlogs as an office problem, not an individual staffer's problem.**

Establish turnaround goals for each point of the process. For example, staff may be allowed five days to draft responses to messages that cannot be answered with existing form letters. However, if the staffer is swamped with a high priority project—like active legislation or preparing for a key event—the rest of the office should temporarily take over their assigned responses. Why? Because it's the Member's reputation at stake, not the staffer's. Every office must develop plans for addressing staffer backlogs and surges in volume. Letting responses languish is not an option.

*It's no exaggeration to say your success in Congress is greatly influenced by the decisions you make concerning constituent engagement. Listening, understanding, and communicating effectively is what representation is all about.*

## Conclusion

It's no exaggeration to say your success in Congress is greatly influenced by the decisions you make concerning constituent engagement. Listening, understanding, and communicating effectively is what representation is all about. Constituent engagement is likely to consume the largest percentage of office resources, and is a major link to your constituents. It's important to be strategic and inclusive. You also need to be entrepreneurial and proactive, not just reactive in your engagement with constituents. It's time to start thinking differently—getting back to the principles of engagement and representation, but with modern tools and practices—because the same old way of doing things will not serve you or your constituents well. How you manage, prioritize, and respond to engagement is up to you, but these decisions will reverberate throughout your office and impact everything else you do.

# About the Authors

**KATHY GOLDSCHMIDT, Director of Strategic Initiatives**, is the primary author of this brief and the visionary behind CMF's decades of work on modernizing constituent communications. Kathy co-created the *Future of Citizen Engagement* and *Communicating with Congress* initiatives and has authored or contributed to dozens of research reports, publications and articles on Congress, including: [\*Rebuilding the Democratic Dialogue\*](#); [\*What Americans Want from Congress and How Members Can Build Trust\*](#); [\*Coronavirus, Congress, and Constituent Communications\*](#); [\*Job Description for a Member of Congress\*](#); [\*State of the Congress: Staff Perspectives on Institutional Capacity in the House and Senate\*](#); and [\*State of the Congress 2022\*](#). She has been involved in much of CMF's research during her 20+ year tenure, and her focus has been on legislative capacity, strengthening and technology use. For many years, she has engaged with the House of Representatives to conduct research and envision ways to modernize Congress. In the course of this work she has testified before the House Select Committee on the Modernization of Congress and the Committee on House Administration.

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# Building Trust by Modernizing Constituent Engagement

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