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Dear Chair Kilmer, Vice-Chair Timmons, Members of the Select Committee, and staff,

Thank you for holding this hearing on Modernizing District Operations and for your continued leadership to make Congress stronger and more resilient. I have often said that the two things that give me hope for Congress are 1) serving as a caseworker, and 2) the work of the “ModCom” — so I am thrilled to see these two themes addressed in this hearing.

I had the privilege of serving as Director of Constituent Services in the district office of Congressman Seth Moulton [D, MA] until December 2019. Like so many, I started out with very little idea of how Congressional offices work — especially in districts. In time, I fell in love with the way casework combines the heart and the head of governing, the policy and the people.

I was fortunate to serve on a team that promoted a sense of mission and shared consciousness between the district and DC offices, and in an office that encouraged innovation and entrepreneurship. I am proud to continue that work at the intersection of technology, constituent engagement, and Congressional capacity in my current role as Director of Strategic Initiatives with the POPVOX Foundation. With that combined experience, I offer the following perspective in hopes that it can be helpful as the Committee considers recommendations for modernizing District Office operations:

Recommendation: The House should develop a unified method of tracking casework, creating a valuable early warning system for problems in the civic user experience.

If measured and monitored, Congressional casework can be the “canary in the coal mine” for programmatic challenges and inefficiencies. One of the modernization projects that provided the clearest payoff for the Moulton office was development of a casework “dashboard” to track basic analytics, such as caseload per caseworker, proportion of overdue cases, trends in our intake vs. closed rate over time, or responses to our casework survey. Over time we developed a system of “tags” that classified cases by agency, specific programs, problems or exacerbating factors: for example, where our CRM only came preloaded with a “Social Security” tag, our system could break down a case into “Social Security: SSDI => Disability Work Reporting + Mid-Atlantic Processing Center + Overpayment + Dire Need: Eviction.” The dashboard also included constituent demographic information captured from the Privacy Act Release Form.

The technology itself was not sophisticated — just a Google spreadsheet — but it provided a real-time overview of our caseload that allowed for the prioritization of resources. If we saw a 200% rise in Board of Veterans Appeal cases over two years, we could raise the problem with local agency liaisons, refer to the legislative team for action, or develop educational resources to help constituents tackle or avoid a common problem.

While our office-specific response to the data produced significant efficiencies within the Moulton office, the potential impact of a House-wide casework analytics system is exponentially greater. A unified system of casework tags for House offices, and requiring CRMs to provide a way for offices to opt in to sharing anonymized casework statistics, could open up an unprecedented body of data on programmatic inefficiencies and “pain points” in the [civic experience](#). This is [data](#) on gaps in federal customer service and policy implementation that doesn’t always show up on federal customer service surveys, capturing the edge cases, the intractable cases, the hard-to-reach constituents who are least likely to answer surveys. This data would allow offices and committees to check statistics against nationwide trends and make an evidence-based determination on when a recurring problem is worth investing time into oversight activities and legislative action.

Recommendation: Congress should partner with federal agencies to help in getting vital information about agency programs to communities, especially 1) in crisis and 2) to communities that are traditionally difficult for agencies to reach. Part of this effort should include an up-to-date caseworker and outreach liaison directory accessible to federal agency liaisons.

Even though Congress is the First Branch of government, it’s rare that Congress is held up as an example for the vastly better-resourced agencies of the Executive Branch to emulate: however, we noted just that in [our submission](#) for OMB’s RFI on Methods and Leading Practices for Advancing Equity and Support for Underserved Communities through Government, highlighting what OMB can learn from Congressional caseworkers. While many federal agencies have been forced to move customer service operations online and to automated systems, Congress has maintained or expanded its number of district offices around the country, serving in some ways as a front office for the entire federal government.

As the last few years have shown, in a moment of crisis, having a single authoritative voice to synthesize information coming from multiple federal and state agencies and take that information out into the community to meet constituents where they are is crucial. Members have largely stepped up to the challenge, finding innovative ways to reach constituents, including through extensive networks of other local officials, service providers, and more.

This outreach and information-sharing partnership between Congressional offices and federal agencies already happens to some extent, but it could be further formalized and strengthened:

federal agencies often miss the opportunity to connect with district staff who are ‘on the ground’ in their communities, in part because frequent caseworker turnover means that agencies have difficulty keeping track of Congressional staff. Further, DC-based briefings may not translate to local outreach activities.

Above, we covered how Congress can take advantage of the data it already collects on constituent interactions with federal agencies; the mirror image is how federal agencies can strengthen partnerships with Congress to help advance shared goals of equitable outreach and better constituent service.

Recommendation: The House should provide ways for district staff to connect and share best practices, case studies, and tools

Individual offices are hotbeds for innovation, but these innovations are rarely shared. In 2018, after handling a series of difficult cases regarding Social Security’s Windfall Elimination Provision, the Moulton team reached out to a local civic tech organization (Code for Boston, the local brigade of Code for America) to ask for technical assistance automating a complex spreadsheet that helped constituents calculate their benefits. After almost a year of weekly hack nights, user testing at town halls, the Code for Boston team rolled out [an online calculator](#) for WEP-affected benefits that was more user-friendly and accurate than materials available from Social Security.

We were thrilled with the app and excited to share with other congressional offices but found few good options for sharing the information. Ultimately, our outreach consisted of:

- Posting on the Caseworkers Assistance Listserv (notorious in its own right for being hit-and-miss on the quality of information shared)
- Briefing the Modernization Staff Association (Code for Boston’s Thad Kerosky, and I traveled to DC to share the information in a discussion organized by the MSA)

This ad hoc information-sharing is typical of the grapevine networks of Capitol Hill that depend on relationships and serendipitous conversations but few formal channels. This informal system means that offices often perform duplicative work to develop resources and processes to serve constituents, as POPVOX Foundation has recently noted in [its work](#) on the reinstatement of Congressionally-Directed Spending and Community Project Funding.

Lorelei Kelly of the Beeck Center at Georgetown University [recently called for](#) an enterprise-wide digital commons for public-serving technology for Congress. This — as well as a method for archiving case studies for innovative processes that do not rely on technology — is absolutely part of the solution, and I hope the Select Committee will explore ways this might be possible.

Another part of the solution is to ensure that district staff have the same opportunities to connect and collaborate as DC staff, sharing the ‘201’ and ‘301’-level expertise and innovations that will

move Congress as a whole forward. Bringing district staff together in person would also allow for the development of collaborative working relationships and would help level the playing field for particularly remote offices or offices with weak delegation ties.

Finally, as the Committee has aptly noted, recruiting, empowering, and retaining a diverse staff is vital to Congress's future: allowing district staff opportunities to learn from each other, develop professional mentorships, highlight their achievements to a professional audience, and feel like a part of Congress may go a long way toward building a generation of district office leaders committed to the long-term future of the institution.

Conclusion: Modernizing district office operations will have an outsized impact on Congress's resilience, capacity, and public trust.

District office modernization presents an opportunity to improve the accuracy and speed of information provided to constituents about their rights and responsibilities with the Federal government. When problems do arise, a House-wide casework analytics and tagging system can provide the basis for active oversight or legislative action to improve the civic experience. Furthermore, the insights and perspectives of district staff are a largely untapped resource for institutional improvements and providing greater opportunities for connection, collaboration, and information-sharing could bring significant benefit for each of the 441 offices in the House.

We are thrilled to see the Select Committee examine these opportunities in depth at today's hearing, and look forward to supporting recommendations in this area.

Very respectfully,

Anne Meeker