WHEN SERVING THE LEGISLATURE MEANS SERVING CONSTITUENTS

Maryanne Jefferson, Chief of Staff
Office of Senator Richard J. Ross, Massachusetts
Constituent Services in Massachusetts

- **House**
  - Each member is allowed to hire one staff member to be assigned to administrative, constituent, or research duties as desired by the member

- **Senate**
  - Members are allowed to hire at least 4 staff people and may assign titles and job responsibilities as they see fit
  - Other senators may be authorized additional staff positions based on seniority or committee responsibilities
  - Staff may be assigned to constituent matters, research or administrative tasks
How is this Arrangement Beneficial to Legislators and Constituents?

- Legislators gain exposure in their districts
- Constituents are able to establish an open dialogue and relationships with their legislators’ offices
Overview of Constituent Services

- Navigating the system and advocating for constituents
- Policies
- Forms
- Constituent Database
- Communications & Correspondence
- Office Hours
- Outreach
Navigating the System and Advocating for Constituents

- Executive Branch and Constitutional Officers
- Legislative Liaison Directory
- Municipalities and other community based non-profit service agencies
- Constituent Services is a bipartisan function
<table>
<thead>
<tr>
<th>AGENCY</th>
<th>ISSUES/FUNCTIONS</th>
<th>LEGISLATIVE LIAISON</th>
<th>DIRECTOR</th>
<th>SCHEDULER/ASST. TO DIRECTOR</th>
</tr>
</thead>
</table>
| Massachusetts Department of Transportation (MassDOT) | • General transportation issues  
• Transportation bond bills  
• Freight rail service  
• Bike trails, regional airports | John A. Smith  
Legislative Director  
(617) 555-5555 | John A. Smith  
Secretary & CEO  
(617) 555-5555 | John A. Smith  
Executive Assistant  
(617) 555-5555 |
| (617) 555-5555                               |                                                                                 |                                            |                                              |                             |
| www.massdot.state.ma.us                     |                                                                                 |                                            |                                              |                             |
| Highway Division                            | • Highway construction and maintenance  
• Status of highway projects  
• Chapter 90 (local road and bridge aid)  
• Speed limits on state and local roadways  
• Snow and ice removal on state highways | John A. Smith  
Legislative Director  
(617) 555-5555 | John A. Smith  
Acting Highway Administrator  
(617) 555-5555 | John A. Smith  
Executive Assistant  
(617) 555-5555 |
| (617) 555-5555                               |                                                                                 |                                            |                                              |                             |
| www.massdot.state.ma.us/Highway             |                                                                                 |                                            |                                              |                             |
| Rail & Transit Division                     | • MBTA, Freight and Passenger Rail issues  
• Regional Transit Authorities (RTAs)  
• Service and complaints  
• Bus and subway schedules  
• Expansion of MBTA service | John A. Smith  
Legislative Director  
(617) 555-5555 | John A. Smith  
Administrator  
(617) 555-5555 | John A. Smith  
Executive Assistant  
(617) 555-5555 |
| (617) 555-5555                               |                                                                                 |                                            |                                              |                             |
| www.massdot.state.ma.us/Transit             |                                                                                 |                                            |                                              |                             |
| Registry of Motor Vehicles                  | • Motor vehicle licenses  
• Title/registration problems  
• Complaints about service  
• Car inspections  
• Merit Rating Board | John A. Smith  
Legislative Director  
(617) 555-5555 | John A. Smith  
Administrator  
(617) 555-5555 | John A. Smith  
Executive Assistant  
(617) 555-5555 |
| (617) 555-5555                               |                                                                                 |                                            |                                              |                             |
| www.massdot.state.ma.us/rmv                 |                                                                                 |                                            |                                              |                             |
| Aeronautics Division                         | • Oversees regional airports | John A. Smith  
Legislative Director  
(617) 555-5555 | John A. Smith  
Administrator  
(617) 555-5555 | John A. Smith  
Executive Assistant  
(617) 555-5555 |
| (617) 555-5555                               |                                                                                 |                                            |                                              |                             |
| www.massdot.state.ma.us/Aeronautics         |                                                                                 |                                            |                                              |                             |
Community Based Non-Profit Social Service Agencies

- Area council of churches
- Food Pantries
- Area heating assistance
- St. Vincent de Paul clothing
Constituent Services Office Policies

- Third Party Privacy Policy
- 48 Hours Response Policy
- 3 Call Follow Up Policy
Constituent Services Forms

- Intake Form
- Privacy Form
<table>
<thead>
<tr>
<th>Date</th>
<th>Time</th>
<th>Name</th>
<th>Address</th>
<th>Address</th>
<th>City</th>
<th>State</th>
<th>Zip</th>
</tr>
</thead>
<tbody>
<tr>
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<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Home Phone Number</th>
<th>Cell Number</th>
<th>Office Number</th>
<th>E-mail</th>
<th>Fax Number</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Best Way to Reach Constituent</th>
<th>Home</th>
<th>Cell</th>
<th>E-mail</th>
<th>Fax</th>
<th>Mail</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
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<td></td>
<td></td>
</tr>
</tbody>
</table>

Call Back Date/Time:

Reason for Calling/Issue:
Other ideas, comments?

<table>
<thead>
<tr>
<th></th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>Put on mailing list.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Put on e-mail list.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Send personalized letter expressing appreciation for their interest and concern.</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>If they prefer, send an e-mail.</td>
<td>Yes</td>
<td>No</td>
</tr>
</tbody>
</table>

If not one of our constituents, refer them to the appropriate legislator. Referred them to:
Privacy Act Authorization Form

Please complete and mail or fax this form to:

Senator Richard J. Ross
State House, Room 000
Boston, MA 02133-1054
Tel: (617) 555-5555
Fax: (617) 555-5556

Date: __________________

Full Name: ____________________________

Mailing Address: ____________________________

City: __________________ State: ______ Zip Code: ______

To Whom It May Concern:

In accordance with the requirements of the Privacy Act of 1974, which protects my confidential records from unauthorized release, I am taking this opportunity to give Senator Richard J. Ross and his staff permission to receive information in my records relative to his inquiry on my behalf.

Signature: ____________________________

Date of Birth: ______________ Social Security Number: ______________

Primary Number: _____________________ Secondary Number: _____________________

Description of the issue and your specific request: ____________________________

__________________________________________________________________________

__________________________________________________________________________
The Barre Group

- The Barre Group is a database that gives legislators and staff the ability to track all constituents inquiries and priorities and provides a log system for casework

  - Constituent cases

  - Legislative issue groups
## Case Files

<table>
<thead>
<tr>
<th>Priority</th>
<th>Issue File Description</th>
<th>Status</th>
<th>Call Back Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>None</td>
<td>Default Issue / Contact File</td>
<td>Open</td>
<td></td>
</tr>
<tr>
<td>Medium</td>
<td>Needs Help with RMV</td>
<td>Closed</td>
<td>2011-08-12</td>
</tr>
<tr>
<td>Low</td>
<td>help with ag issue</td>
<td>Open</td>
<td>2005-06-02</td>
</tr>
<tr>
<td>Low</td>
<td>test</td>
<td>Closed</td>
<td></td>
</tr>
</tbody>
</table>

## Contact History

<table>
<thead>
<tr>
<th>Contact Date</th>
<th>Case File</th>
<th>Contact Type</th>
<th>Record By</th>
<th>Contact Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>2011-Aug-06</td>
<td>Needs Help with RMV</td>
<td>Call from Agency</td>
<td>Erin Hearn</td>
<td>The RMV Called back. They are working on it and think they know the issue.</td>
</tr>
<tr>
<td>2011-Aug-05</td>
<td>Needs Help with RMV</td>
<td>Call In</td>
<td>Erin Hearn</td>
<td>Called the Registry of Motor Vehicles. Talk to Ms. Smith she will look into the issue for us.</td>
</tr>
<tr>
<td>2005-Jun-01</td>
<td>help with ag issue</td>
<td>Letter Received</td>
<td>David Tuttle</td>
<td></td>
</tr>
<tr>
<td>2004-Dec-06</td>
<td>Default Issue / Contact File</td>
<td>Call In</td>
<td>David Tuttle</td>
<td></td>
</tr>
<tr>
<td>2004-Nov-17</td>
<td>Default Issue / Contact File</td>
<td>Call In</td>
<td>David Tuttle</td>
<td></td>
</tr>
</tbody>
</table>

## Constant Contact Interface

### Constant Contact Details for david@thebarregroup.com

<table>
<thead>
<tr>
<th>Contact ID</th>
<th>Status</th>
<th>Email Type</th>
<th>Confirmed</th>
<th>Insert Time</th>
<th>Last Update Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>Active</td>
<td>HTML</td>
<td>Yes</td>
<td>2010-05-19T08:50:46.892Z</td>
<td>2010-05-19T09:02:32.245Z</td>
</tr>
</tbody>
</table>

### Edit Constant Contact Details

<table>
<thead>
<tr>
<th>List Name</th>
<th>List ID</th>
<th>List Size</th>
<th>Opt In Source</th>
<th>Opt In Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>General Interest</td>
<td>1</td>
<td>2</td>
<td>ACTION_BYCUSTOMER</td>
<td>2010-05-19T09:02:32.248Z</td>
</tr>
</tbody>
</table>
Constituent Case File Screen

**Case File #** 333099  
**Opened By** Erin Hearn  
**Issue Priority** Medium  
**Issue Status** Closed  
**Short Description** Needs Help with RMV  
**Call Back Date** 2011-08-12  
**Long Description** Mr. Tuttle called the office. He is having an issue with the Registry of Motor Vehicles. They suspended his license. He claims it is not him that had the parking tickets.  
**Closing Remarks** Ms. Smith said the tickets came from the car the plate was assigned to before. Mr. Tuttle will have his license reinstated. I called Mr. Tuttle to let him know

**Contacts made regarding this Case File**

<table>
<thead>
<tr>
<th>Contact Date</th>
<th>Contact Type</th>
<th>Contact By</th>
<th>Note</th>
</tr>
</thead>
<tbody>
<tr>
<td>2011-08-06</td>
<td>Call from Agency</td>
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<td>The RMV Called back. They are working on it and think they know the issue.</td>
</tr>
<tr>
<td>2011-08-05</td>
<td>Call In from Constituent</td>
<td>Erin Hearn</td>
<td>Called the Registry of Motor Vehicles. Talk to Ms. Smith she will look into the issue for us.</td>
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</table>

**Attached Case File Documents**

<table>
<thead>
<tr>
<th>Document Description</th>
<th>Upload File</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
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</tbody>
</table>
Constituent Correspondence

- Legislative response e-mail and letters
- Accolade letters
  - College graduation and dean list letters
  - Welcome to district letters
- Visitors’ Office log
Constituent Services Outreach

- Office Hours held at local senior centers
- Senior Tax Circuit Breaker
- Newsletters
- E- Bulletin
When Serving the Legislature Means Serving Constituents