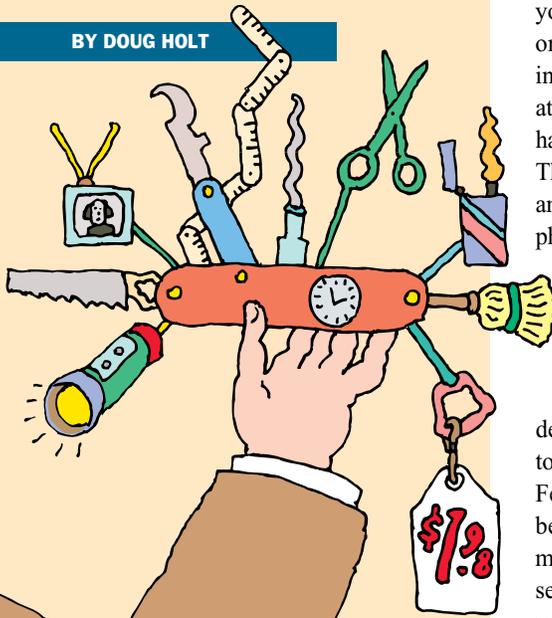


# Tools for the Modern Legislator

Current technology can make the work of the lawmaker much easier.

BY DOUG HOLT



Doug Holt is starting his fourth year as a Georgia representative. He is a computer programmer by trade. Go to [www.dougholt.org/Legislator\\_Stuff.htm](http://www.dougholt.org/Legislator_Stuff.htm), for the information Representative Holt provides members of the Georgia legislature.

Most legislators can't remember the number of times they were teased with comments such as "your first session is like taking a drink out of a fire hose." The remark is in jest, but highlights a serious challenge: How do you deal with the tremendous volume of contacts, constituent calls, legislation and other concerns that rapidly pile up? Thankfully, new smartphones and computer software offer solutions to a modern legislator's "fire hose" problem.



## KEEP IN TOUCH, ORGANIZE YOUR TIME

Smartphones, like the well-known BlackBerry®, combine the capabilities of cell phones with hand-held computing horsepower. They allow you to make phone calls (backed up by voicemail), trade text messages or email, and surf the Web. You can use these connections to screen incoming contacts and focus on calls or messages that need immediate attention. Other contacts can be saved for later. Most of these devices have address books, calendars, "to do" lists, and other useful software. This combination lets you mesh your digital correspondence with time and work management. Some of these tools may come with the smartphone, and others are available as third party software.



## STAY ON TOP OF CONSTITUENT CALLS

Contact management, consumer affairs, customer service and help desk software packages are available and can be adapted to a legislator's needs. There are even some simple ones that run on a smartphone. Few packages are on the market specific to our needs, so you need to be careful when choosing software. If you know a programmer, you may consider going the route of "home-grown" software. Software selection also depends on how much you want to record. We all handle many calls by citing well-known facts or by referring them to local, state or federal officials and agencies. If you want to record "one shot" calls, your software choices must offer quick and easy data entry.

Be certain that what you choose collects and stores certain essential information.

- ◆ Constituent contact information (name, address, phone, email, etc.).
  - ◆ A description of the problem.
  - ◆ Some means of recording progress toward resolution.
  - ◆ An overall status indicator that allows you to "close" a call.
- Some "extras" from a home-grown package to consider are:
- ◆ Case attention lists ranking calls by length of time open, and by a priority you assign.

Open Cases Sorted by Age							Sort By Priority
Occur Date	Last Name	Case #	Days Old	Followup Date	Priority	Status	
06/18/2007	Jenkins	115	24		3	Awaiting Constituent Response	
06/25/2007	Trammell	117	17		1	Open	
06/25/2007	Grubaugh	119	17	08/06/2007	5	Awaiting Constituent Response	
07/01/2007	Windham	120	11		4	Awaiting Constituent Response	
07/08/2007	Verner	121	4	07/25/2007	1	Open	
07/10/2007	Pope	122	2		4	Open	

Open Cases Sorted by Priority							Sort By Age
Priority	Occur Date	Last Name	Case #	Days Old	Followup Date	Status	
5	06/25/2007	Grubaugh	119	21	08/06/2007	Awaiting Response from Contact	
4	07/01/2007	Windham	120	15		Awaiting Response from Contact	
4	07/10/2007	Pope	122	6		Open	
3	06/18/2007	Jenkins	115	28		Awaiting Constituent Response	
1	06/25/2007	Trammell	117	21		Open	
1	07/08/2007	Verner	121	8	07/25/2007	Open	

◆ Case lookup based on a variety of criteria.

Comment	Memo					
Name	Case Number	State/City	Zip Code	Advisor	Home Phone	Work Phone
Find Last Name:		Find Name				
Case Number	Name	City/State	Date Entered	Status		
31	Manson, Andrew	Madison, GA 30650	06/21/2005	C		
2	Miller, Cindy	Covington, GA 30014	06/18/2005	C		
24	Norton, Michael	Rutledge, GA 30863	06/21/2005	C		
1	Neuman, Bill	Rutledge, GA 30863	04/20/2006	C		
111	Porter, John	Covington, GA 30014	01/15/2007	C		
119	Fulman, Steve	Atlanta, GA 30334	02/20/2007	W		
122	Rawls, Steve	Atlanta, GA 30334	06/23/2005	O		
43	Rentro, Pat	Madison, GA 30650	06/18/2005	C		

- ◆ Ability to store more than one contact person per case (allows you to record others involved with the case, whether they are constituents or people helping you to resolve the case).
- ◆ Storage of correspondence involved in the case, either as text or electronic image.
- ◆ A place to record whether real, physical paperwork accompanies the software-based case record.

You may not find all the features that you want in a single package, but remember the bottom line: The software must ensure you never forget an incomplete constituent call.

### 3 TRACK LEGISLATION

Tracking legislation involves two activities. The first is your own work reviewing bills and resolutions. This also includes how you plan to vote, and later, how you did vote. The second is recording opinions received from constituents about particular bills. Many legislators like to interact with people who have contacted them about hot topics.

An easy place to record this information is on a spreadsheet.

	A	B	C	D	E	F
1	Bill/	Plan to Final		Constituent		
2	Resolution	Vote	Vote	Opinion	Name	Email or Mailing Address
3	HB 111	Y	Y	Y	Edgar Smith	esmith55@aol.com
4				Y	Mary Wilson	ewils@bellsouth.net
5				N	Jack Torrance	555 Oak Drive, Anytown, GA 30333
6						
7	HB 145	N	Y	Y	John Public	jp5006@hotmail.com
8				Y	Greg Gump	greggump256@comcast.net
9				Y	Charles Jenkins	9090 W Elm St, Mansfield, GA 30055
10				N	Megan Flanders	flandersm@att.net
11				N	Janet Morrison	jmorr@local.net

Use the first three columns to record the bill/resolution number, your planned vote, and your final vote. Then use the next three columns to enter your constituent's opinion, name, email or mailing address. You could also add a seventh column to check off follow-ups.

Finding specific software for this purpose may be difficult, but a web search is worth a try. Obviously, you want anything you select to have the features described in the spreadsheet example above. To help evaluate products, some additional features are worth considering:

Bill/Res.	My Opinion				Pro	Con	Voted?			
HB1001	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	1	2	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
HB1005	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	0	3	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
HB1006	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	5	3	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
HB1010	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	2	2	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
HB1039	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	1	0	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

(Double Click for Detail)

## SOFTWARE FEATURES

There's no single software package or dominant vendor used in state legislatures for constituent relations. Countless companies offer software identified as "contact management, correspondence tracking, or customer relationship management (CRM)" systems. Some of these software packages are very expensive, complex and loaded with features legislators may not need.

Instead, legislators and legislative staff in many states use familiar desktop applications, such as spreadsheets and email programs, adapted for tracking constituent correspondence. In other states, in-house legislative technology staff have developed customized constituent management systems for legislators. Some of the features in these systems include:

- ◆ Anywhere, anytime accessibility via the Internet.
- ◆ Integration with email systems and other desktop applications.
- ◆ Email notification of new constituent requests.
- ◆ Merge mailings or mass emails personalized for constituents and from individual legislators.
- ◆ Logs identifying senders and recipients of mailings and their contents.
- ◆ Tracking of constituent positions on specific bills.
- ◆ Databases populated with regularly updated voter records.
- ◆ Topic categorizations (e.g., SSN problem, constituents who are veterans).
- ◆ Duplicate record checking/comparison.
- ◆ Search functions.

There are a few states that have nonpartisan constituent services offices to help legislators specifically with constituent relations. Kentucky's Office of Constituent Services provides nonpartisan constituent services and uses a custom application developed by the Legislative Research Commission's Office of Computing and Information Technology. Kentucky's newly updated system assigns a number and date to requests as they are received. Staff enter the name and contact information of the constituent and make notes about the subject of the request and each action taken. Staff can search on a wide range of criteria, including name, date, subject of request, topic assigned, staff assigned and actions. The system also allows matching of constituent requests. For example, if a person contacts both her representative and her senator, her record can be flagged to note that, although each legislator can determine whether he wants that information shared or not. Staff of Constituent Services respond to constituents on behalf of legislators, and written responses to citizens go out on a member's letterhead, and are tied to the constituent's record in the system.

In Arkansas, both the House and Senate have constituent services offices and in-house developed CRM systems. One of the first projects former Speaker Bill Stovall took on after becoming director of House Constituent Services in 2007 was to ask information technology staff in the Bureau of Legislative Research to help him develop a new constituent services system for the House. Stovall wanted reporting features so that he could identify the status of work being done for constituents who had contacted their legislator with a question or problem. Staff can pull up a list of all open cases that need to be resolved. A time-and-date stamp is marked on every action taken, so that questions or problems referred to a state agency or steps taken to resolve a problem can be reported. The system also provides for automatic notification with the click of a mouse so that legislators are made aware of progress on the case.

—Pam Greenberg, NCSL

- ◆ A “big picture” summary window or report.
- ◆ The ability to store notes to yourself about particular bills.
- ◆ The ability to store correspondence from constituents as text or electronic image.
- ◆ A “cleanup” utility, to make purging data easy after the session is over.

If you want to track only “hot issue” legislation, the spreadsheet will certainly serve well.



### TRACK YOUR WORKLOAD

Sometimes constituents want “evidence” that you are earning your keep. Or you may simply want an idea of where your time goes. The humble spreadsheet again provides an elegant tool for tracking the many contacts and other work you handle each day. Set

	A	B	C	D	E	F	G	H	I	J	K	L
1	<b>2007 Session Contacts Tracking Sheet</b> (ID = In District, OOD = Out of District)											
2												
3												
4		Non-	Personal	Personal	Phone	Phone						
5		Personal	Mail	Mail	Calls	Calls	In Person	In Person	Email	Email	Email	
6	Date	Mail	(ID)	(OOD)	(ID)	(OOD)	(ID)	(OOD)	(ID)	(OOD)	(Spam)	Bills Read
7	4/13/2007	4	2	0	0	0	0	0	3	9	9	86
8	4/14/2007	0	0	1	1	0	0	0	12	7	36	0
9	4/15/2007	0	0	0	0	0	0	0	5	2	12	0
10	4/16/2007	2	1	7	5	0	0	2	29	6	62	2
11	4/17/2007	0	0	0	0	1	0	0	12	5	58	3
12	4/18/2007	0	0	6	1	2	0	0	15	8	81	0
13	4/19/2007	4	0	13	6	2	0	0	5	7	41	0
14	4/20/2007	0	1	1	2	3	0	3	21	9	69	0
15												
16		10	4	28	15	8	0	8	108	53	445	7
17												
18								% of Total	% Email			
19								Total In District Contacts:	127	18.70%	85.04%	% Spam
20								Total Out of District Contacts:	552	81.30%	9.60%	80.62%
21								Total Contacts:	679	100.00%	89.25%	

one up with columns for each type of contact that you wish to record. The “sum” feature in any spreadsheet program will keep totals up to date. It is also informative to break down totals in and out of district and perhaps in other ways that interest you.

Each day of the session, add a new row. The grand totals at the end are often quite surprising.

### BETTER HELP IS ON THE WAY

By using these tools, even legislators with little or no support staff can stay on top of great volumes of details. Still, always be on the lookout for new tools. Innovation in the information technology industry is galloping along, so you can count on better ways of managing the “fire hose” in the future.



**CHECK OUT** the author’s brief guide of helpful hints on how to track daily contacts on a spreadsheet and how to download a fully functional case tracking program at the [www.ncsl.org/magazine](http://www.ncsl.org/magazine).

### SOFTWARE LOCATOR AND DOWNLOAD SITES

**2020software.com**  
[www.2020software.com/compare-software/category/5/CRM-Software](http://www.2020software.com/compare-software/category/5/CRM-Software)

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