The Future of Constituent Engagement

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The Office of the Chief Administrative Officer (CAO) of the U.S. House of Representatives, specifically its House Digital Service (HDS) team, appreciates the Committee on House Administration Subcommittee on Modernization and Innovation's invitation to participate in its hearing on the future of constituent engagement. Subcommittee Chairwoman Bice, Ranking Member Torres, and members of the Subcommittee have been both instrumental and supportive of the CAO's endeavor to help House offices achieve greater efficiency through innovation, including its efforts to harness new technologies that improve Member constituent services while simultaneously protecting Members' data.

Bottomline upfront; the House should securely expand access to constituent data so Members can reap the benefit of new constituent engagement innovation.

The CAO plays the unique role of both innovator and host to vendor innovation. Under the Committee's leadership, it has facilitated access to commercial off-the-shelf generative artificial intelligence (GenAI) tools that can improve constituent engagement and oversight capabilities and capacity (e.g., correspondence, speeches, report summaries, etc.). It has also successfully leveraged AI internally to develop and deploy custom applications specifically aimed at assisting Members with constituent engagement activities. With the evolution of our on-premises and secure cloud storage and computing technologies with AI integration, the CAO believes more can be done to provide Members with greater access to emerging AI technology solutions that will help Members further engage with their constituencies.

The CAO believes the House should consider restructuring the current IT infrastructure and technical environment that hosts Members' constituent data, explore ways to securely provide greater access to that constituent data, and improve the flow of information to vendors about security requirements and contract protocols required to do business with the House. Combined, the CAO believes these improvements will increase the development of and access to new, innovative applications that will yield more meaningful constituent engagement.

This testimony will explore the current state of constituent engagement and vendor services and propose a potential solution to increase access to both in-house and vendor innovative solutions.

Current State: Congressional Constituent Engagement Landscape
Since the era dominated by landlines and letters, congressional communications between Members and their constituents have grown and evolved along with technological advancements in communications and the proliferation of social networking. Today, Members can send e-newsletters, host tele-town halls, and reach tens of thousands with merely a few clicks of a button. What remains a challenge is conducting meaningful, two-way constituent engagement with ever-growing constituencies and finite resources.

AI tools offer potential solutions to make inbound constituent sentiment more manageable. GenAI Is already assisting offices with tasks such as drafting form letters without replacing human involvement. Future AI-enabled applications could enhance email and digital mail handling through categorization,

sorting, and advanced analytics. The technology is there; the barrier is securely accessing the underlying data for these new tools.

There are numerous modern methods for conducting constituent engagement beyond traditional email and mail, such as deliberative town halls, text messaging, and other innovative approaches. Organizations across the country are exploring new ways to make it easier for constituents to conduct outreach, but they have no easy way to plug into the existing Correspondence Management Systems (CMS) that offices use to manage constituent data.

With so many potential avenues to pursue, what should the future of constituent engagement with Congress entail? The role of the CAO, as a nonpartisan institutional office, is not to prescribe how offices should conduct constituent services, but rather to empower Members to deploy their most effective strategies using the best tools and resources available.

Current State: Existing Channels for Vendor Services and Associated Challenges to Integrating New Applications
As it currently exists, excluding major enterprise technologies and web services (e.g., email, data storage, web, web conferencing, financial systems, etc.), the House has two primary "avenues" for vendors interested in doing business with House offices.

First, there is the House's cloud review and approval process prescribed by House information security policy designed to protect House data.[1] This process evaluates multiple application criteria (e.g., product fitness, security risks, technical specifications, legal terms and conditions, etc.) and applies to all cloud applications and technical services "not developed, owned, or under contract by the House." There are currently over 90 approved applications for Member office use.

Second, is the House Technology Services Contract (TSC), which governs the CMS products, Maintenance Services, and System Administration Services. Per the TSC, each vendor must meet and maintain specific functional, security, financial, and infrastructure standards. CMS vendors, for example, are required to provide approximately 115 platform features and are responsible for collecting, updating, storing and transferring Members' constituent data. Through its regular collaboration with House CMS vendors, the CAO understands the demands placed on CMS vendors under the current TSC structure can be complicated and strict.

The Committee has approved rigorous standards for all House vendors and has assigned to the CAO the role of vetting vendor compliance. The CAO reviews vendor proposals against these standards and makes recommendations to the Committee for consideration. The Committee only authorizes vendors that have met House standards as validated by the CAO.

The reviews of and requirements on vendors that do business are thorough and strict for good reasons and based on past experiences. Over the past two decades, there have been vendors who have experienced financial hardships that disrupted service to Member offices. Multiple vendor

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[1] The United States House of Representatives Information Security Policy for Protecting House Data in Cloud and Non-House Services (HISPOL 017.0)

platforms have experienced severe technical limitations and repeated cybersecurity failures that placed constituent data at risk. One instance involving a vendor's technical limitations resulted in a Member permanently losing all constituent records – an unacceptable outcome that highlights the need for thorough review of vendors performing work at the House.

The current IT structure and vendor review, approval, and contracting protocols are required to mitigate risks and safeguard Members' data to the maximum extent possible. The current structure and processes, however, have created a system where all Members' constituent data resides within the proprietary platforms controlled by a very small pool of vendors. Thus, emerging innovators can't access constituent data without coordination with these vendors. This limits innovation.

Potential Solution to Increase Constituent Engagement Innovation: Data Lake
The evolution of AI technologies coupled with growth in secure storage and computing technologies makes now the perfect time to consider revamping how Members' constituent data is securely controlled, updated, transferred and made available to applications.

Instead of the current structure, where a small pool of vendors are responsible for collecting, updating, storing and transferring Members' constituent data, the House should consider creating a secure, House-controlled constituent data environment that can be leveraged by various House and vendor applications as authorized by each Member. The proposed data environment is commonly referred to as a "data lake" within the tech industry.

Migrating to a House-controlled data lake model would require a multi-year phased-approach to ensure a seamless, secure transition for both Members and current CMS vendors. It would also require additional resources to develop and sustain year-over-year. The CAO has worked with the Subcommittee to develop and submit a formal modernization funding request to explore this model.

The CAO's proposed plan would iteratively bring these capabilities online without disrupting the existing CMS vendors or office workflows. The benefits of this platform would also be realized in phases, with new services coming online from both the institution and commercial technology providers, not to mention relief from many of the pains felt by offices and vendors due to Congressional transitions and redistricting.

By building a data platform and vetting processes that focus on data, governance, security, users, and constituents first, the House can spur both internal and external innovation in constituent engagement.

Internal Opportunities: House AI Integration & Customized Constituent Engagement Innovation
Advancement and adoption of GenAI technology is already being deployed to engage and target Congress through advocacy efforts and nefarious cyber-criminal activity. Congress, in turn, must also leverage GenAI to its advantage, which is exactly what the CAO is working towards in collaboration with the Committee on House Administration and its Subcommittee on Modernization and Innovation.

Since 2022, when OpenAI released ChatGPT, the CAO has worked with the Committee to review and authorize multiple GenAI products for House use. There have been advisory groups, use case adoption, guidance, and guardrails for the House community. In September of 2024, the House became the first legislative body in the world to establish a formal AI policy.

Today, multiple platforms are approved for use by House offices, and the House is preparing to roll out an AI platform integrated with offices' Outlook and OneDrive data. It is also actively reviewing additional tools for integrated deployment.

In addition to assisting with the authorization and deployment of commercial AI platforms, the CAO is leveraging AI to build and deploy customized applications for the House. For example, the CAO is currently working on an important pilot project with the Subcommittee, known as "CaseCompass," that leverages AI to anonymize, aggregate, and analyze casework data from 14 participating Member offices. The pilot application, still in its infancy, is already capable of automatically categorizing casework based on executive branch agency and constituent-reported problems, thus allowing offices to see chronological and geographical trends in agency challenges. If rolled out House-wide, this application could positively impact Members' ability to assist constituents with casework, conduct oversight of executive branch agencies, as well as contemplate legislative policy changes to improve outcomes.

The data lake model could have expedited existing projects like CaseCompass. Because all CMS providers collect and store data differently, the CAO had to invest time and money into building and maintaining infrastructure to access and retrieve casework data for each participating Member office across multiple vendors. The proposed data lake would have vastly accelerated development and can still enhance scalability, grow functionality, and improve data governance with varied tiers and permissions.

The data lake solution also opens the door to new opportunities. The CAO is uniquely positioned to provide value in areas where the private sector is unlikely to fill the need, and data aggregation across the entire House is a great example. In addition to chamber-wide casework analytics via CaseCompass, the House could explore the same concept for constituent correspondence. Each office is manually performing trends analysis on their own data and only in the context of their individual office, but there is a wealth of valuable insights to be gained from high level trends from the public as a whole across the country.

Finally, the data lake model could also facilitate greater interoperability and data sharing with existing House applications (e.g., e-Dear Colleagues, HouseCal, etc.) to produce constituent sentiment analyses and provide Members with greater insight into constituent sentiment on pending legislation and House activity. Imagine a Legislative Assistant receiving an e-Dear Colleague requesting co-sponsorship of a new bill, and the email already includes that over 500 constituents have written in about the topic and links to a breakdown of their sentiment analysis.

External Opportunities: Private Sector Innovation and Member Office Freedom of Choice

The roadblock to greater innovation is not a lack of innovative ideas; it's the complexities associated with doing business with the House. There are numerous examples of innovative applications that have potential to help Congress. In fact, over 20 innovators pitched new Congress-specific applications in September during the Seventh Annual Congressional Hackathon hosted by House Speaker Mike Johnson, Democratic Leader Hakeem Jeffries, and House CAO Catherine Szpindor. Multiple new AI-powered CMS providers have garnered interest from House offices, but they have no easy path to sell to the House. Under the data model, these tools could come to market and offices would not face the risk of losing constituent data if a company fails.

The new system would reduce the many requirements on existing House vendors, including the often-cumbersome requirement on current CMS vendors to transfer data between Members when authorized. It would encourage vendors (old, new, full-service, and niche) to experiment with new innovative solutions to augment CMS. More importantly, it would enable offices to leverage new services without having to transition to a new CMS. For vendors, that opens the opportunity to offer a new service to every House office without having to convince them to change their primary CMS provider.

Conclusion
Again, the House plays two critical roles when it comes to advancing constituent engagement technologies – innovator and host.

As an innovator, the CAO is proud of the work it has done to deliver customized services that leverage the power of AI and improve House office operations. It strongly believes that it must continue its important work to constantly assess Members' needs and develop innovative solutions that help offices interact with and assist growing constituencies.

As host, the CAO recognizes the inherent value of private-sector innovation and must do everything within its power to facilitate greater access to cutting-edge technologies. This includes exploring a new constituent data lake that promotes and facilitates vendor innovation. Success in this role will be measured by secure and competitive constituent service application options.

With the advancement of AI and secure cloud storage and computing technology, coupled with the improved flow of information to potential vendors, the CAO believes there exists great potential to increase constituent engagement innovation.

The CAO appreciates the opportunity to participate in this important discussion and looks forward to its continued partnership with the Subcommittee and House stakeholders as it continues its work on this important and impactful initiative.