## Process for Developing a Strategic Constituent Engagement Plan

*Excerpted from the Congressional Management Foundation report,* [*The Future of Citizen Engagement: What Americans Want from Congress & How Members Can Build Trust*](https://congressfoundation.org/public-opinion-trust-2021)*. Most citations have been removed but can be found in the full report. Select resources are included as links at the end of this post.*

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.

We believe offices would be better served by creating an overall constituent engagement plan that allows you to be more in charge of your message and to better demonstrate to constituents that you 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 why not coordinate efforts and messaging to define and accomplish your goals? The following is a process congressional offices can use to strategically develop an engagement plan for building trust with, and better engaging, your constituents. You can answer these questions individually or use them to facilitate a small or large group discussion among your staff.

## 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?

## 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. Moreover, marketing researchsuggests that seeking feedback, in itself, improves satisfaction. However you collect the information, some of the key questions to answer about your constituents are:

* Has the office conducted any 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? Who responded and what do the results tell the office?
* 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 missing?
* Has the office reviewed the trends in open, click through, and forward rates of different email responses and outreach? Website analytics? Social media analytics? What do they 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.), urban/suburban/exurban/rural mix, political ideological breakdown, computer and broadband access, etc.?
* 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?

## Assess Your Current 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 assess your current practices. Following are questions you can use to help do that.

* What methods of engagement does the office use? How does each perform in the [Constituent Engagement Assessment Worksheet](https://www.congressfoundation.org/storage/documents/cmf_constituent_engagement_assessment_worksheet.xlsx)?
  + - 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, etc.
    - YouTube
    - Others?
* Has the office looked at open rates for email responses, e-newsletters, and other targeted emails? Has the office tested 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?
* How much has the office spent in the past 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?
* Has the office considered shifting 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 trusts (e.g., online town hall meetings with independent moderators)?
* How much time is spent on the different methods currently? Can time be allocated elsewhere from less productive to more productive?
* What tone is conveyed through your constituent engagement practices, and is it the tone you want to convey?
* Who are you hearing from and not hearing from?
* What are the Senator’s/Representative’s strategic goals and are your current practices helping to achieve them?
* Are your current practices demonstrating 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?

## Develop a Strategic Constituent Engagement Plan

Once you have a handle on how your current practices are, and are not, working 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. 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?
* 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?

## 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?

**Additional Resources**

* [*The Future of Citizen Engagement: Rebuilding the Democratic Dialogue*](https://www.congressfoundation.org/projects/communicating-with-congress/rebuilding-democratic-dialogue) (CMF)
* [*The Future of Citizen Engagement: What Americans Want from Congress & How Members Can Build Trust*](https://www.congressfoundation.org/projects/communicating-with-congress/public-opinion-trust-2021)(CMF)
* [“Constituent Engagement Assessment Worksheet”](https://www.congressfoundation.org/storage/documents/cmf_constituent_engagement_assessment_worksheet.xlsx) (CMF)
* “Defining Your Role in Congress,” Chapter 9, [*Setting Course, A Congressional Management Guide*](https://www.congressfoundation.org/publications/setting-course)(CMF)
* [*Job Description for a Member of Congress*](https://www.congressfoundation.org/storage/documents/CMF_Pubs/cmf-member-job-description.pdf)(CMF)
* “[Conduct a Constituent Satisfaction Survey](https://www.congressfoundation.org/office-toolkit-home/constituent-satisfaction-home)” (CMF)
* “Creating a Coordinated Agenda,” Chapter 1, [*Keeping It Local: A Guide for Managing Congressional District and State Offices*](https://www.congressfoundation.org/publications/keeping-it-local)(CMF)
* “[How Surveys Influence Customers](https://hbr.org/2002/05/how-surveys-influence-customers)” (Paul M. Dholakia and Vicki G. Morwitz, *Harvard Business Review*, May 2002)