



MISSOURI HOUSE OF REPRESENTATIVES

June 12, 2023

To: Dale Wright, Chair – Committee on Administration and Accounts

From: Dana Rademan Miller, Chief Clerk and Administrator

Re: Fireside Constituent Management

Representative Wright, you had asked for some information and comparison data between the current Missouri House of Representatives Constituent Management (CM) application and the recently proposed Fireside platform. Following are my thoughts as well as a summary of background information for context. Also included in the exhibits is a table of historical CM user data as well as a list of additional features that the Fireside application contains along with the estimated time needed for our development staff to incorporate those features into CM, should we desire to do so.

Background

The House of Representatives has a long history of maintaining a constituent management program to aid House members and legislator assistants in managing constituent data. Early versions of CM were self-created systems managed individually by LAs. In the mid-1990s, House Information Systems staff developed "CM2," a Microsoft (MS) Access database interface, followed by "CM3," a Visual Basic application that connected to an MS Access database on the network. In 2004, the House unsuccessfully attempted to migrate to an off-the-shelf product (Microsoft CRM), administered by a third party vendor (St. Charles-based Quilogy). Due to a number of reliability issues, that contract was terminated early and a new program, called simply "CM" was authored in-house by Matthew Ross, a senior application developer within HIS, and was launched in late 2006. CM has proved to be a reliable platform that has served the membership well for nearly 17 years.

In January 2022, a working group was formed to consider enhancements to the existing CM program. Ten LAs participated in the working group, which was facilitated by House Information Systems staff. Over the course of six months, the group proposed a number of updates that were incorporated into the latest version of CM, which was released as a beta version (testing environment) in May 2022 and officially launched in conjunction with the redistricting data upload in late 2022. The feedback from the users has been overwhelmingly positive. Currently, the CM application may be accessed internally as well as through the House of Representatives web portal.

Fireside 21 Constituent Management

In late May, 2023, I was invited by Chris Roepe with John Bardgett & Associates to attend a demonstration of a constituent management platform known as “Fireside.” Fireside is owned by parent company FiscalNote, a tech provider that has developed a number of data management tools. Other brands under the FiscalNote umbrella include CQ, FrontierView, Oxford Analytica, and VoterVoice.¹ The presentation was facilitated by Scott Crosby, FiscalNote Managing Director for State and Local Governments. Chris Roepe with John Bardgett & Associates, who represents FiscalNote, was also in attendance as well as Matt Ross (HIS) and Danyale Bryant. Fireside appears to be a web-based product that integrates contact forms, mailing templates and other features into its framework. For an additional cost, the program can facilitate telephone town hall meetings and other constituent outreach services.

Based on my limited use of CM platforms, I could not find fault with the Fireside application. I found the cost, however, at \$388,000 annually, with a minimum two-year contract, to be prohibitive. I also found the product to be a redundancy given the investment of time and resources that the House has expended to develop our current CM tool.

I have further concerns regarding the potential integration of the Fireside application with the VoterVoice platform. It appears that members could potentially export data obtained within their official capacity as a state representative (constituent case files) into this campaign-related tool. Interestingly enough, while Scott Crosby spent considerable time explaining a number of FiscalNote branded programs, he completely skipped over an explanation of VoterVoice. It is my opinion that he did not want to get into a discussion on this subject.

¹ According to their website, [VoterVoice](#) is “your #1 grassroots advocacy tool to rally supporters, maximize campaigns, and make sure your message is amplified across all levels of government.”

“Clean Missouri”

As an aside, it should also be noted that with the 2018 passage of Amendment 1 (known as “Clean Missouri”), House members became “custodian of legislative records under the custody and control of the member, their employees, or staff.” An additional provision of this measure stipulated that “legislative records shall be public records...”² The measure did not, however, contain a reference or requirement relating to record retention. Thus it became the responsibility of each member, as custodian of records for their respective legislative districts, to establish an open records policy as well as a retention schedule for legislative records. Perhaps unintended, but a consequence of this act has been a reluctance by some members to record constituent case issues, thus an overall diminished utilization of CM.^{3 4}

Summary

The practical benefits of maintaining our existing CM application are clear. First and foremost, the House of Representatives uploads registered voter data directly from the Missouri Secretary of State. We thus ‘own’ and maintain the data in a secure and stable environment, free from third-party management or interference.⁵ Additionally, the staff who developed and currently maintain the existing CM platform are House employees. As a matter of practice, HIS staff are responsive to user input and suggestions. They have and will continue to incorporate updates into the CM program based on customer feedback. Further, the House of Representatives has a long-standing practice of maintaining constituent data internally. I have concerns that this program could lead to members potentially blurring the lines between official (state-owned) data and data used for campaign purposes.

Finally, since the current CM program was developed and is maintained by House staff, it is cost-efficient. In contrast, the base quote for the proposed Fireside application would exceed \$775,000 for the minimum two-year contract. Outside of the Xerox printing services contract, this service would be the second-most costly outsourced expense.

While from a high level, the Fireside CM application appears to be a solid program, it is an expensive redundancy and is not needed. For this reason and those enumerated above, the House should maintain the existing in-house Constituent Management application.

²[Article III, Section 19\(b\) of the Constitution of the State of Missouri](#)

³ In 2019, the House of Representatives adopted an operating rule that provides that “*Members may keep constituent case files...confidential.*” (Rule 124 of the [Rules of the House of Representatives for the 102nd General Assembly](#), adopted January 11, 2023. This rule was subsequently challenged and is currently pending in the Missouri Court of Appeals, Western District. See *Missouri Sunshine and Government Accountability Project v Missouri House of Representatives* [WD86212](#) (2023).

⁴ See Exhibit III, “Constituent Management User Data by District.”

⁵ See Exhibit II, “Background on House of Representatives Constituent Management Applications.”

Exhibit I

Fireside Features and Timeframe for Incorporation into CM Prepared by House Information Systems Staff – Matthew Ross

- **Case Management tracking – Solution mostly in place**

Currently CM has the ability to record “Issues” that can include case management information. This includes attachments, status, and an open text field. “Issues” is not a dedicated section for Case Management, but does allow the user to create an issue type of “Case Management” that can be searched separately or create other issue types if the user prefers.

We could create a fixed “Case Management” issue in all districts if that is desired. This could be done as a protected type (un-removable by users) in less than a day. This could be done as a simple type (removable by users) in less time. Currently only 6 districts have a user-created issue type resembling this and it is rarely used, though, so this fixed issue type has a high likelihood of going unused.

- **Case Management agency tracking – 2.5 weeks**

Fireside has a feature that was stated to allow monitoring of where cases were in the process of working through agencies. Currently this is handled by users.

A listing of agencies and a time started and time ended entry for each could be created to mirror this functionality if desired. The interface for this would take 2.5 weeks. Again, users currently do not seem to be extensively tracking casework in CM, so this feature has a high likelihood of going unused.

- **Pre-loaded contact data - \$100k/yr + 1-2 weeks**

We already import Secretary of State (SOS) data on an approximately monthly basis, as often as the SOS data is provided. Noteworthy, Fireside updates its data annually. The additional data we do not have currently is the “L2 Political” which would add email and phone addresses for some constituents. In the current system, this can be entered when a constituent contacts a Member office, but it is not pre-loaded.

Data services of this type seem to be exclusively priced-by-quote. CM currently has 4,235,800 records. Rounding to 4 million, and extrapolating from what pricing I could glean from a L2 Political marketing video of their purchasing system and a review of i360, both would cost in the ballpark of \$100k per year, assuming the necessary data is included in their base packages.

The data shown in the various examples I looked at would require a new process to be written to import and match the data. Depending on the consistency of the data received, this could take 1-2 weeks and may have a very high level of unmatched (useless) data purchased which could not be determined until the data was purchased and processed. This would only be adding email and

phone numbers for a subset of the constituents who have NOT contacted their Member's office before, so this feature seems unlikely to provide any meaningful use. This type of data is usually used for marketing campaigns, which is outside the scope of constituent management and has a high risk of accidental misuse.

- **Messages/Newsletters – 4+ weeks**

We have a DevExpress tool already in place for the House Intranet site which does the type of editing required for this. We have investigated and it should work for this function, but we need to verify that the email images it produces would not overload the mail server. A preliminary look at the data involved seems like it should be the same or less than existing Capitol Report mailings, but that may not be the case.

To adapt the tool for the template aspect of this purpose, to create a master-template version for Communications to produce Capitol Report templates in, and to modify the existing constituent search options to provide a list of desired email contacts to the template to send will take 4+ weeks.

- **Merge duplicate tool / Household match warning – 2 weeks**

This feature would entail giving the user pairs of matching constituents to determine if they want to merge the two records and what records they want kept from each. Because our data is primarily imported from the Secretary of State (SOS) data, we would need to manage this in the form of hiding constituent records deemed a duplicate if both are from the SOS data and otherwise merging user-created records into one and marking the other as deleted/hidden. The delete/hide flags would need to be implemented in all reporting and searching. Due to the high risk of error, a backup/archive record would also be created of both entries pre-merger to give us the ability to undo such changes.

This would take 3 weeks to implement. We have looked into this previously and opted against it due to the low number of user-entered records. Currently users will search for a constituent before entering them in the system, which generally prevents duplication.

- **Member contact form on website – 5+ weeks.**

This would be similar to our existing Capitol Report Signup form, but with additional fields. At a basic level, this would require the form, adding a "public" option to issue types to appear on the form, a system to take the value and notify the user, and a system to input the data into CM, and an inbox page in CM displaying the website contact and a tool for matching that contact to an existing or new constituent.

It would take 5+ weeks of developer time for the basic form similar in function to that in Fireside. This could be rolled out to all members uniformly or be an opt-in or opt-out style feature like the Capitol Report Signup is.

- **Contact batching/mass email – Not currently doable in-house in its full form. Partial form would be solved by the Member contact form.**

This feature would be entirely contingent on limiting contact to a form on the website for us to implement and would be inherent in the inbox page component mentioned above. We would not be able to support AI matching of email title and content text, which in the Fireside tool seems to use a MailChimp address to manage through their tool rather than the official state email address of a Member. Through the form, though, constituents would self-select issue types from the given options which would group them together.

Massachusetts State Senator Brownsberger created an app called LegCRM that is open source PHP and has a form of this feature that used human-involved categorization of emails. During NALIT 2022 he said they were exploring expanding it to have AI text classifications but there have been no updates to the source code since that presentation.

There may be some purchasable tool for this but I have not been able to find it. I am inquiring with the tech team to learn if anything is available.

- **Reporting – 2-3 weeks development**

We currently give users the ability to search by issues by user-created “issue type”, stance (ie. for/against), status and a text search of issues. These search results can be exported as a contact list which could be opened in Excel and used to generate custom reports as desired.

Dashboard-style reports were discussed in the 2021-2022 redesign but the focus group was not interested in them.

We currently use DevExpress tools, which has a Chart control which could present this data in graph forms. To implement a simple graph report tool that takes existing search criteria and produces one type of graph (eg. bar graph, pie chart, etc.) would take a developer 2 weeks. To add a selection of simple graph type options would require an additional week.

- **Mobile interface – Solution mostly in place**

CM is designed to function in both desktop and mobile platforms with controls that are sized to be useable on mobile. This requires users to access CM through the Portal page on their mobile device. This may be an area of complaint as the Portal login page itself is not mobile friendly, having buttons that are cumbersome due to small size and a screen that is wider than a mobile screen, causing extra scrolling while logging in. This is a CISCO tool that we have limited ability to customize, but we may have some degree of customization ability that could make this interface easier to use on mobile. If this change is desired, it should be a relatively quick change if it is possible.

Exhibit II

Background on House of Representatives Constituent Management Applications

- The original “CM1” was a series of LA-maintained spreadsheets, Microsoft Access databases and other self-created systems.
- Mid to late 1990s - CM2 was a MS Access database interface, with each county giving a data export in their own format. Pat Stafford and Donna Viet (former HIS staff) both worked on this complex process that involved distributing the MS Access databases to each district LA.
- CM3 was a Visual Basic application that connected to a MS Access database on the network, getting rid of the distribution CM2 had, along with giving users new requested features.
- In 2004, a leadership decision led to purchasing the Microsoft CRM platform. By 2005, this had become a contract with Quilogy, a company out of St. Charles, who was supposed to fully implement Microsoft CRM with a custom import tool and training for users. Microsoft CRM replaced CM3. This process was plagued by numerous glitches from the beginning. Key issues that affected the history of it were extreme search slowness (on the order of minutes for a single constituent lookup), extreme update slowness (HIS calculated 9 months of continuous running to update all districts even once using the Quilogy-provided uploader, which made monthly updates impossible), and an automatic background system deleting records.
 - Due to the extreme update slowness, Matt Ross created an uploader tool that ran in parallel to import data rapidly, bringing the update process to 2-3 days per month. (Microsoft CRM uses a GUID, or “Globally Unique Identifier” which is why this process was slower than our current process.)
 - Due to the extreme search slowness, Quilogy created a search bypass page which was modified to suit our purposes.
 - Due to the records disappearing, we involved a Microsoft Engineer and escalated the problem through their support process. They were able to isolate what process was doing it, but they weren’t able to explain or stop it. This prompted a process of terminating the contract.
- In late 2006, Matt Ross developed Constituent Management (CM), a Visual Basic .NET web application leveraging a search page based heavily on our modified version of the search bypass page and a variation on the uploader tool that had been written for MS CRM, along with a new in-house designed database, and the “Advanced Export & Mail Merge” tool Pat Stafford designed to mimic functionality from CM3. Additional features were added periodically without changing the project for several years.

- In 2015, Tim Forck translated this version of CM from Visual Basic .NET to C#. He kept the features visually and functionally similar from a user perspective.
- In late 2021/early 2022, due to user requests, a task force was formed to revamp Constituent Management. HIS staff, Publications staff, and a selection of LAs participated. The code for this was completed in July, but with the significant changes to the user interface it entailed and the upcoming redistricting, we pushed back the deployment to coincide with redistricting in November, 2022.

Data Uploads

- At some point around 2006, the Secretary of State developed their own system for voter registration and began requiring counties to use it. This changed the process from individual imports in a wide variety of formats to a single format from the Secretary of State's office.
- In 2006, the format of the export the House was provided changed frequently, and was in a non-standard format, so Matt Ross created a custom uploader. This code reads the import file line-by-line, parses out where records exist, and detects where records are missing, then inserts a corrected line into the database based on that line of the import file. The current uploader tool essentially does the same thing, just in the format we currently use rather than the format MS CRM required. This takes approximately 2.5 hours and puts the data into a staging table.
- After the uploader tool finishes, HIS staff start a populating, cleaning and formatting process on the data. This moves it from the staging table to the tables used by CM, while also cleaning and formatting. In the current iteration of this process:
 - All dates of birth are backed up to a holding table. (New statute in 2022 does not allow SOS to provide dates of birth.)
 - Type 0 (not-modified) records are all deleted to be replaced by fresh SOS data. This maintains type 1 (user-modified) records as-is and leaves type 2 (user-created) records alone.
 - Formatting text is applied, along with secondary table processing to speed up certain searches.
 - PO Boxes are set to "preferred" where not already set by users.
 - Dates of birth are restored from the holding table.
 - Data that is not part of the SOS import (issues, email addresses, etc.) is not affected by this process.
- During normal operation, the "save" function on Constituent Management compares the new data to the old data on type 0 records. If they don't match, they are set to type 1 to protect them from future updates. HIS has a procedure that, at the request of a district, can turn a type 1 back to a type 0 either individually or across the whole district.

- During normal operation, users can create or modify constituent data, but no delete option is provided. This was part of Rich Beckwith's promise to users after the lost MS CRM data that the new system would not lose data. We have a procedure that, at the request of a district, can delete individual constituents. We also have a purge procedure that can fully delete a district back to just SOS import data that can be run at the request of a member (Rich discouraged use of this, but some members did request a CM purge of their district just before they left office). This purge process has not been used since the 2022 rewrite and will need to be reviewed before use to ensure it reaches all the new data such as stored queries.
- Periodically, indexing on the data is reprocessed to maintain search & reporting speed. Backups are also performed daily with 1 week of SQL backups kept at a time on-site.
- Data is stored on an internal database with its own unique internal security credentials and which is not connected to the webserver to avoid this data being vulnerable to SQL injection attacks or compromised servers. This also uses HTTPS internally, encrypting the data to avoid internal network sniffing.

Exhibit III

2023 Constituent Management User Data

2023		2023 Stats			
District	Issues			Average uses per month:	22,934
60	1496			Total uses 2023, Jan-May:	114,669
95	1165			Distinct users accessing:	231
148	558			Total exports 2023, Jan-May:	2,463
58	469				
96	348				
155	297				
144	289				
34	234				
157	224				
89	212				
116	161				
141	113				
123	94				
127	87				
7	86				
104	85				
65	76				
122	73				
61	65				

119	64				
11	56				
113	56				
126	46				
136	45				
143	41				
112	35				
107	26				
59	20				
111	17				
120	15				
9	14				
29	12				
91	9				
0	7				
16	7				
124	7				
8	6				
81	6				
4	5				
5	5				
101	5				
93	4				

103	4				
110	3				
28	2				
36	2				
53	2				
86	2				
87	2				
6	1				
13	1				
17	1				
25	1				
30	1				
47	1				
48	1				
63	1				
100	1				
106	1				
145	1				
159	1				