



# A Community Builds an App with Congress

By Lorelei Kelly

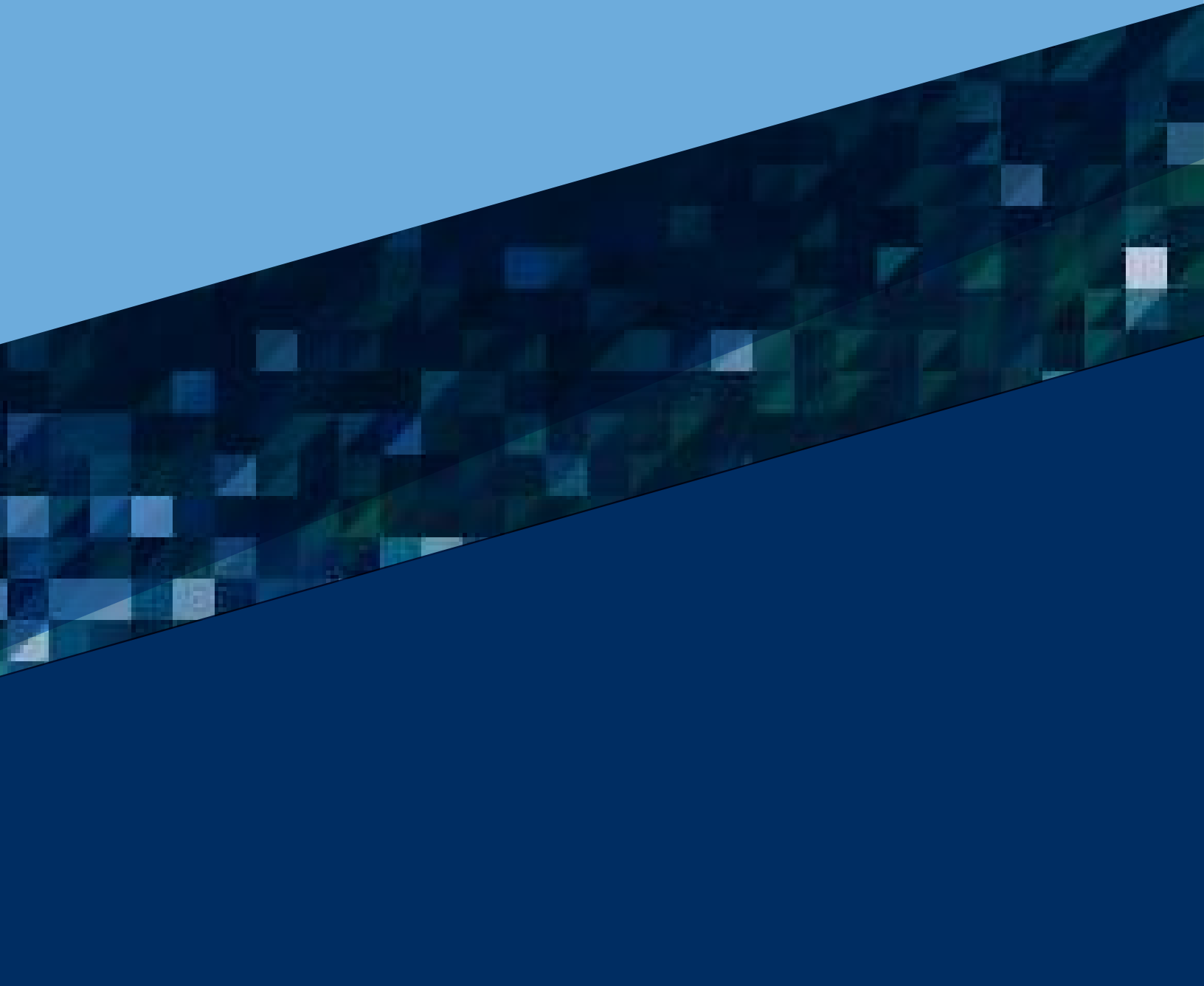
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# About This Case Example

This publication utilizes our [Shape > Structure > Share](#) framework for digital public infrastructure. We illustrate this framework through a case example that examines how a congressional staffer worked collaboratively with local public interest technologists to **shape** an app specifically **structured** to solve a constituent service challenge. The app was then **shared** through congressional dissemination channels and with the public on a website. We envision this framework as a positive, forward-moving cycle in a modern, representative democracy.

This publication is also a “how to” guide. You will learn how members of Boston’s local Code for America brigade offered their technology skills on behalf of an app project: a custom Social Security benefits calculator. Public interest technologists are an example of a skills-based policy-adjacent community, which help guide and determine present and future policy decisions and are critical to implementing policy. This concept expands the notion of civic participation to communities as co-creators of civic infrastructure. In our example, the participants built technology that helps constituents and also saves staff significant time.

At the Beeck Center for Social Impact + Innovation at Georgetown University, we know that the meaningful inclusion of policy-adjacent communities is a constructive way to ameliorate the crisis of democratic legitimacy in American society. These voices offer authentic, local information that is different from experts because it is voluntary and based on lived experience. Individuals with hands-on technology experience make up a deep reservoir of insight that government leaders should tap into.

Thanks to civil society efforts like [Code for Boston](#) and the rising prominence of tech-savvy **millennials** into leadership roles, Congress has formally begun to broaden its representative capacity through electronic methods. For example, digital adaptation necessitated by the COVID-19 pandemic has allowed Congress to include a greater variety of voices in committee hearings. More civic collaborations like these are both timely and essential.

We look forward to a future when policy-adjacent communities regularly participate in the formative stages of policymaking and also bolster other functions through monitoring implementation and evaluating impacts. This civic activity is a generator of data for evidence-based lawmaking and trust building toward a durable and resilient democratic republic.

The information and photos in this case example were gathered and presented by Lorelei Kelly, a fellow at the Beeck Center for Social Impact + Innovation at Georgetown University. It was edited by Katie Hawkinson. The Beeck Center gratefully acknowledges the efforts and insights of the organizations, individuals, and government agencies that have been working in this ecosystem for years.

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# Introduction: Shape > Structure > Share



This case example is based on a collaboration between congressional district staff and a local technology community. Working together, they built the **Windfall Awareness** app. In today’s Congress, nearly half of all congressional staff are located in districts (compared with 22.5% in 1972). Congress’ human capacity is scattered across the U.S., in approximately 900 district offices. These offices serve as networked connection points for a modern system of digital federalism, as well as places for experimentation, data gathering, and collaboration.

We are publishing this case example using the Shape > Structure > Share framework to illustrate its replicable components. In this case, a local technology community informed the **shape** of a custom app to optimize information sharing between constituents and Congress. Congressional staff worked as part of this team to **structure** the community expertise in a format compatible with the constituent service workflow. Then, the staff **shared** this collaborative output through congressional channels and with the broader public.

This is also a “how-to” guide. We encourage members of Congress, their staffs, and their committees to refer to this case to include local input to both imagine and create technology that serves democracy. In this case example, the office of Congressman Seth Moulton (MA06) innovated with a local group of civic technologists known as Code for Boston who were also part of the national **Code for America** network. Working together, Moulton’s office and Code for Boston built an app to calculate a Social Security benefit regulated by a place-determined amendment known as the **Windfall Elimination Provision**. Since this team created the app, Congress has accelerated digital development with pandemic emergency rules **changes** in 2020 and rolling **recommendations** issued by the Select Committee on the Modernization of Congress. For example, remote video participation in hearings and electronic document submission—formerly in-person and hard copy—have become routine workflow activities. The app featured in this case example also represents a present gap in Congress’ institutional capacity to safeguard and share public interest technology. We anticipate that the new **Congressional Digital Service** will remedy this missing capacity, beginning in the House of Representatives.

## SHAPE

Civic participation in democracy has deep roots throughout New England.

To be sure, Massachusetts residents have historically set a high bar for self-determination. The Mayflower Compact—the first American document establishing self-government—was signed in Provincetown, and the Boston Tea Party was the result of a series of town gatherings. Congressman Moulton’s district headquarters sits in downtown Salem, across from the Old Town Hall, one of the earliest public squares in the country. Moulton’s district office has made a point to routinely gather input from constituents. His office workflow is centered around the community and staff use modern tactics to improve service. The staff created a functional database that structured data from constituent relationship management along with a dashboard for casework. In fact, his office was one of the first to use technology to unify his Capitol Hill office with his district office through video conferencing and Slack. The Congressman has also shared his knowledge with his House colleagues, irrespective of political party. For instance, he created a guide for his Veterans Town Hall model and wrote a “Welcome to Congress” handbook for new members. His office also produced a casework guide for new offices.



The Old Town Hall in Salem, Massachusetts.

An innovator himself, Moulton spent his career supporting ideas that used tech to improve Congressional workflows. The inclusive culture of his office provided an ideal backdrop for collaboration with local public interest technologists.

- This case example began with a pragmatic goal: an effort to optimize staff time and improve the **Civic User-Experience** (CUX) of Social Security recipients.
- Congressman Moulton had a track record as a technology enthusiast as it related to institutional workflow. He encouraged his staff to experiment and share.
- Moulton’s office regularly sought constituent input to shape the content of policy. Collaborating with locals to shape a constituent serving technology had a familiar precedent.
- Code for Boston—a local brigade of the national Code for America network—was an active and well-regarded group of voluntary public interest technologists.

## STRUCTURE

Moulton's office sought to build a technology solution to facilitate information sharing between citizens and government. District staff know the esoteric and often confusing intricacies in federal policy and are also the face of the members back home. They plan and attend events, hold office hours, and make themselves available in innumerable ways to improve communication. They also have access to internal expertise for outstanding questions about how an innovative idea would fit into congressional rules or workflow. Knowing these details was vital to structure digital public infrastructure like the Social Security benefits calculator that earned a working title, the "Windfall Awareness App."

### The **Windfall Elimination Provision**

—a 1970's era amendment— is an example of federal policy that impacts states unevenly. The Windfall Elimination Provision in Social Security caused distress in Massachusetts (and other states) because of local adjustments made to benefit amounts based on employer history.

Enter Anne Meeker, Director of Constituent Services for Massachusetts' 6th district, who had always been passionate about public interest technology. During her time on Moulton's team, Meeker noticed that casework staff in the district spent an excessive amount of time assisting constituents with Social Security because of the Windfall Elimination Provision.

- Constituents in the district expressed frustration at the lack of a useful one-stop place for information about their benefit.
- Pulling on her own interests, Meeker reached out to local volunteer technologists at Code for Boston to help with the project.
- Moulton supported Meeker's decision to spend time on this innovation project.
- Meeker and the Code for Boston team created a schema—a structured format—and then built a calculator to help constituents understand their benefits: the **Windfall Awareness app**.

## PUBLIC INTEREST TECHNOLOGY

Meeker noticed that casework staff in the district spent an excessive amount of time assisting constituents with Social Security because of the Windfall Elimination Provision.



Anne Meeker and Thad Kerosky of Code for Boston present the Windfall Awareness App project to colleagues on Capitol Hill.

# SHARE

Once the Windfall Awareness app was launched, Meeker organized an all-staff briefing on Capitol Hill, where she and Thad Kerosky—project lead at Code for Boston—described the challenge, the partnership, and the successful result.

- Meeker made sure that a notice of the app went out on the internal constituent service list serve for all congressional offices
- Because Congress itself lacks an internal location for civic purpose apps, Meeker secured a [website](#) to maintain the app for public access.
- Meeker’s colleague, Ananda Bhatia, went on to found the [Modernization Staff Association](#) to support reforms and provide feedback to members.

COMMUNITIES	MEMBERS	CONGRESS
<b>Shape information</b>	<b>Structure information</b>	<b>Shares information</b>
District congressional staff teams up with local technologists to build an online Social Security calculator: the Windfall Awareness App.	Working together, technologists and constituent serving staff in Moulton’s office build an application with specific technical capabilities to calculate and adjust for a provision in Social Security regulations.	Moulton’s staff convene a briefing open to all colleagues and also make sure other casework staff receive notification about the app, which remains online for all to use. A Moulton staffer creates the Modernization Staff Association for junior staff in Congress.

The Shape > Structure > Share framework provides a way to think about governing, where communities act as contributors with power and agency over institutions that affect their everyday lives and the lives of others. The following will further clarify how an elected leader in Congress can work together with a skills-based policy-adjacent community to build public interest technology. This report ultimately seeks to answer one important question: how did Moulton’s staff and Code for Boston work together to create a successful product that benefited the community they serve?

## 1. IDENTIFY AN EFFICIENCY GAP AND SECURE THE SUPPORT TO ADDRESS IT.

A democratic government should facilitate human collaboration in service of the whole society. Policies are the government guidelines that ideally result in such positive outcomes. Technology can optimize and improve these collaborative relationships and lead to improved policy implementation. These values informed Moulton’s staff’s work on the Windfall Awareness App.

Meeker wanted to enlist Code for Boston to create a better user experience for constituents of Massachusetts' 6th district. She gathered data from her own constituent interactions to illustrate the problem to her district office director.

- Hundreds of constituent contacts came to the Massachusetts 6th district congressional office in the form of casework, phone calls and letters during the time spanning from January 2015 through December, 2018. These contacts expressed concerns about the Windfall Elimination component of Social Security and district staff had few solutions to offer.
- The constituents were often surprised/alarmed at the amount of dollars that this component took out of their benefits **payment** and wanted their Congressman to assist by either verifying or contesting their reported benefit calculation with the Social Security Administration.

## 2. LAY OUT THE CASE

Organizations with limited staff resources can boost outcomes if they look for ways to optimize efficiency. The workflow challenge with the Windfall Elimination Provision was a disproportionately large use of staff time. A self-service calculator app built with the help of local public interest technologists would save valuable time to apply to other constituent needs. After identifying her need, Meeker reached out to Code for Boston.

**Scenario:** Constituent visits Moulton's office with hard copy notification letters and denied appeals from the Social Security Administration → Meeker sits down with the constituent and together they call the Social Security Administration for the pre-calculated parts of the formula inaccessible to the constituent → Meeker and constituent spend 40-45 minutes completing the calculation.



## 3. IDENTIFY A LOCAL COMMUNITY WITH THE TECH CAPACITY TO BUILD SOMETHING NEW

With her boss' support, Meeker became the institutional champion for the Windfall Awareness App. Code for Boston volunteer Thad Kerosky agreed to meet with Meeker and learn more about the Windfall Elimination Provision challenge.

Meeker shared the **flowchart** that her casework colleagues used for Social Security assistance and the current tools available through the **Social Security Administration** and other organizations. Their conversation focused on one question: is a technology fix appropriate? For the Windfall Awareness App, the answer was yes. It expanded public good problem solving in two directions, between the Member and the constituent. Next, they scoped out the app end-users.

Meeker and Kerosky became the core team. They brainstormed a policy storyboard that showed an individual constituent's interaction with the system of Congress. They developed a shared vision and refined the Windfall Awareness project concept. They scheduled weekly hack nights in a well attended co-working **space**.



## 4. WORK AS AN AGILE TEAM

The core team spent a few weeks figuring out the work plan and [scope](#) of the project. When the whiteboards of math and intent were coherent, they brought in the broader Code for Boston membership. Kerosky shared his experience helping to manage volunteer skills for the Windfall project on [GitHub](#).

The team spent three months creating the launch app, with Meeker attending the hack nights on her commute between Salem and Boston.

With the beta model in hand, Meeker began civic user testing with constituents at in-person Town Hall meetings. The user experience phase of the project presented typical challenges. New technology adoption is a difficult undertaking, especially when your target audience is made up of seniors unaccustomed to digital infrastructure. Meeker's intent was for the technology adoption to begin with constituents who were willing to try the app in the hopes that they would then use it, and provide feedback. Ideally, these constituents would then promote the value of the app among their friends and peer networks.

The Windfall Awareness App is now available to help constituents avoid the sudden alarm they feel over financial plans. It saves congressional staff time because constituents are able to help themselves with a policy obstacle or come to a meeting better prepared. Even more, it exists as a shared public resource. Kentucky, New Hampshire and Ohio have to contend with the same Social Security amendment.



Rep. Seth Moulton (MA06) at a constituent Town Hall at North Shore Community College.

Because it is shared with everyone, all Social Security recipients can use it to predict, verify, plan for, or avoid the Windfall Elimination Provision.

# Conclusion

The challenge remains to find a permanent home for the Windfall Awareness App and other innovative digital public infrastructure built with Congress in mind. See this [memo](#) and this [report](#) about the need for a secure enterprise communications architecture in Congress—one that could include shared digital resources and provides an institutional memory so that incoming members and staff can carry the baton forward on innovation. It is worth noting that frequent staff turnover in Congress depletes institutional memory and capacity.

As a district office proof of concept, the Windfall Awareness App was a success. Yet the jury is out as to whether or not this kind of public-spirited innovation will move the institution of Congress toward 21st century progress. Congress still needs funding support and capacity to absorb and metabolize public interest technology. Despite the larger challenge, this project hit vital high marks: building shared knowledge and creating opportunities for increased legitimacy in U.S. democracy.

## Continuing The Conversation

This final section offers author perspectives and starting points for civic technologists hoping to work on a project with Congress.

Perhaps the most exciting aspect of modernizing Congress are the benefits that can come from including a broader range of civic activity in the policy process. Indeed, building a more inclusive democracy will not only bolster legitimacy in government, but also improve the knowledge and skills available to policymakers. The U.S. government is experiencing a crisis of legitimacy; the attack on the U.S. Capitol in January 2021 illustrates how democracy is contested and institutions are at risk. New types of connecting technology will play a vital role in leveling the playing field between insiders with access and citizens who are mostly shut out of the process of lawmaking. In this way, collaborations like the Windfall Awareness App can create a more representative governing system.

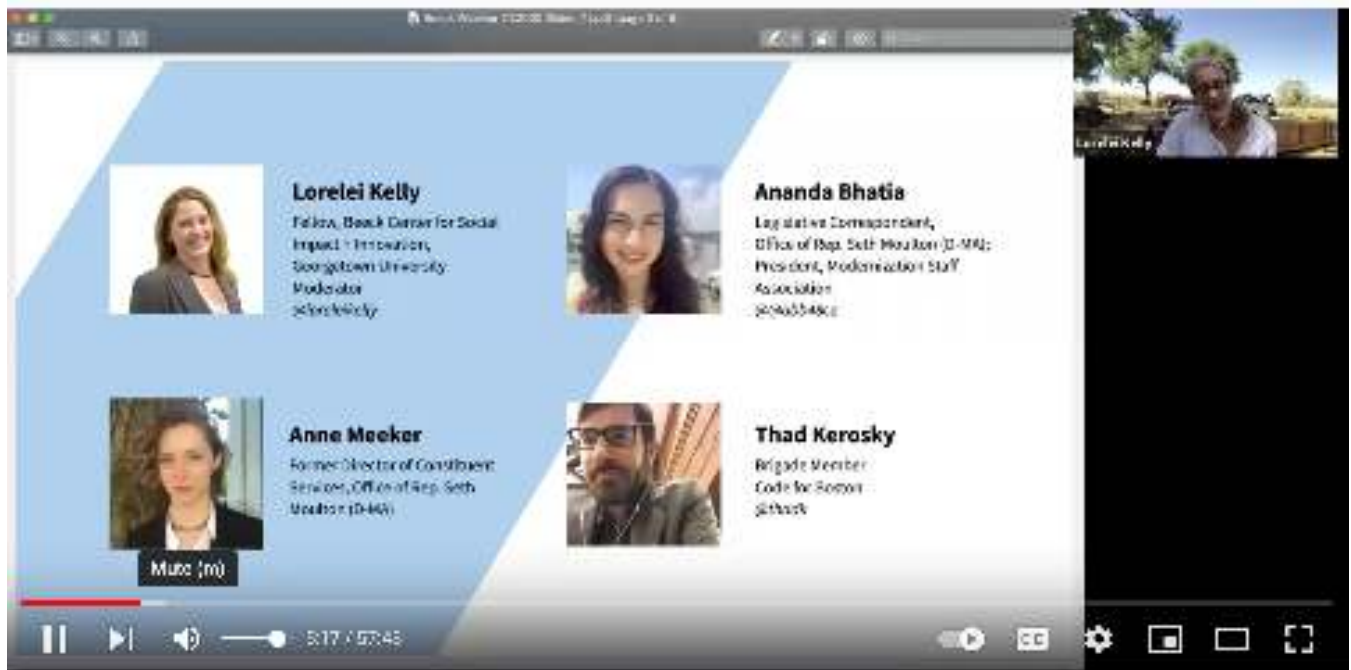
Before the COVID-19 pandemic, the U.S. Congress had already experienced significant digital changes. For example, U.S. Code became machine readable and committee information consolidated into [one central](#) repository. Yet to this day, Congress lacks an enterprise-wide digital commons for public-serving technology. Civic tech projects [sometimes fail](#) to reach an optimal audience when they lack a place to go where they can be hosted and maintained to serve the public. An app built as a collaboration with a Member of Congress like the Windfall Awareness App is one example. An institutionally approved digital space would solve this problem.

Progress is ongoing and new possibilities are continually emerging because of modernization. To be sure, 60% of the recommendations [issued](#) by the first session of the Select Committee on the Modernization of Congress have been implemented or are in process. Some of the civic-tech-relevant recommendations include:

- Updated institutional **Communications Standards**
- Accessibility for the disabled
- Remote telework capacity i.e. enterprise Zoom license, committee hearings streamed and archived
- Transparency in bill writing and amendments
- Bulk purchase of technology
- A Congressional Digital Service
- Public website for all **Member Mass Communication**
- Member directed **Community Project Funding**

The Modernization Committee recently passed another set of **recommendations**, creating many opportunities for experimentation and public interest technology collaboration. Recommendations addressed:

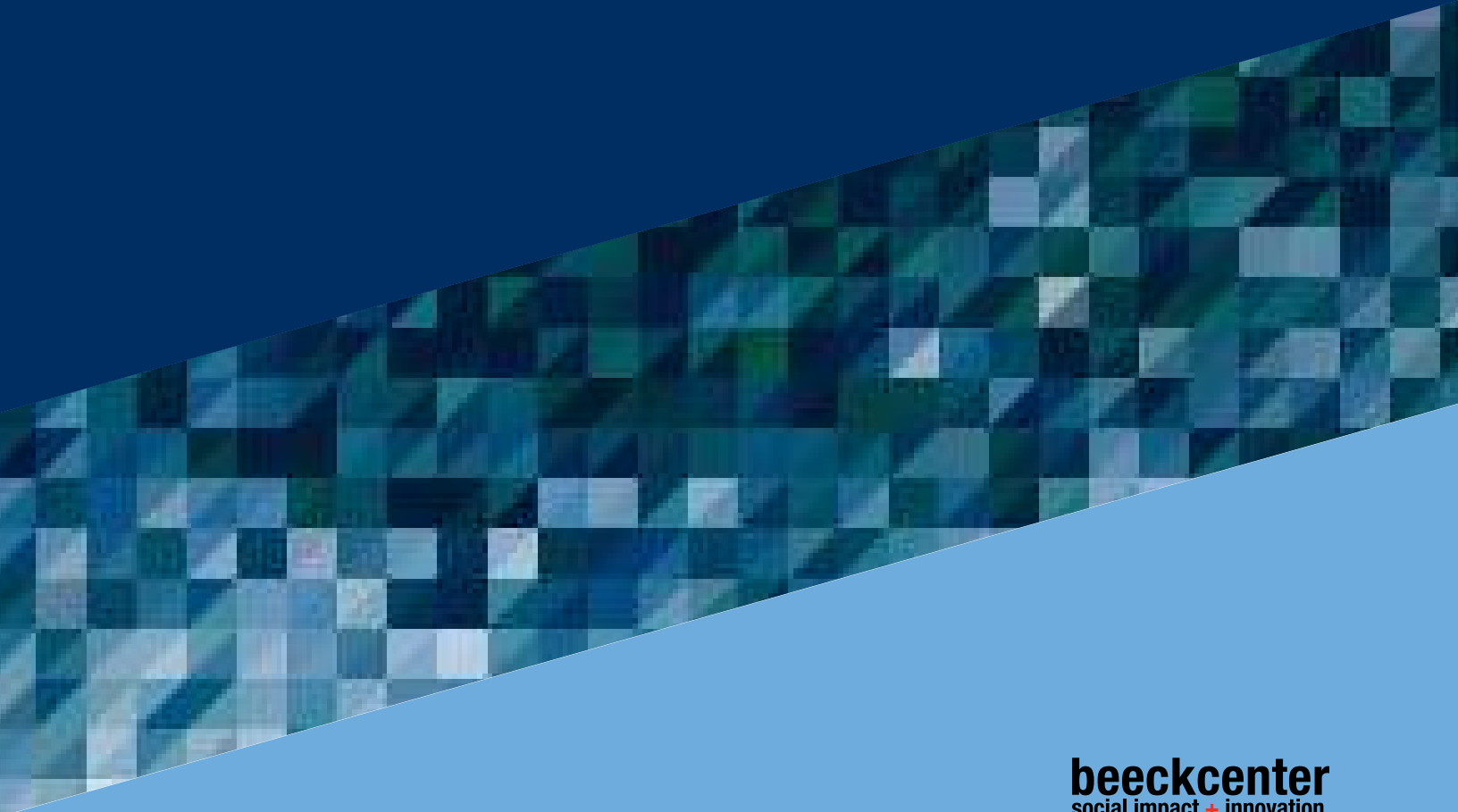
- The need to collect diverse institutional data
- Better use of data and evidence in congressional functions, including oversight
- Technology tools for collaboration
- The Committee has also highlighted capacity needs in hearings and **through virtual listening sessions**. Here are some ideas to pursue:
  - How would we structure district office information as constituent serving data that would be helpful for policy in Congress? For example, for oversight, evaluation, monitoring, dynamic modeling? How about a dashboard? For more information, view an October 27, 2021 **hearing** about it.
  - How is Congress building capacity to incorporate the **Foundations for Evidence Based Policymaking Act** and strengthening its **Article One powers** to keep up with the Executive Branch?
  - How might individual members share with their colleagues the information they have learned about data and technology in their individual districts? A central casework archive? A Civic App Store? A Maker Space for committees? In person collaborative methods are vital in politics. How about a caucus or study group of members who are also former state legislators to share local best practices?



### Modernizing Congress: Bringing Government into the 21st Century

The individuals involved in this congressional collaboration presented their experience in conjunction with the 2021 Code for America Summit. [Watch here.](#)

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