“All politics is local.” — Nowhere is this lesson heeded more diligently than in the district and state offices of Members of Congress. Whether a Member has one or multiple district/state offices, each functions as an integral part of the overall organization. Coordinating the widely varied activities of several offices — often hundreds of miles apart — is a tough management challenge, but a critical one to conquer. That’s where Keeping It Local comes in. Now in its third edition, this results-driven manual provides guidance specifically designed to help offices create an equal partnership between the district/state and DC offices and improve the efficiency and effectiveness of district/state operations.

The Congressional Management Foundation (CMF) is a nonpartisan nonprofit dedicated to helping Congress and its Members meet the evolving needs and expectations of an engaged and informed 21st century citizenry. CMF has pursued this mission for more than 30 years by working internally with Member offices, committees, leadership and institutional offices in the House and Senate to identify and disseminate best management, communication and citizen engagement practices through research, publication, training, consulting and facilitation activities. Simply put, CMF advocates good government through good management.

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# Table of Contents

Table of Figures ........................................................................................................ iv
Foreword by SHRM ............................................................................................. v
Preface .................................................................................................................. vii
Acknowledgments ............................................................................................... ix
Introduction .......................................................................................................... xi

## CHAPTER 1—Creating a Coordinated Agenda ........................................... 1
- The Value of Planning ......................................................................................... 2
- The Importance of the Coordinated Agenda .................................................... 4
- Establishing a Coordinated Planning Process .................................................. 6
- The Planning Time Frame .................................................................................. 11
- The Mission Statement ...................................................................................... 13
- Developing Goals ............................................................................................... 15
- Evaluating Potential Goals ............................................................................... 16
- Developing Action Plans .................................................................................. 19
- Implementing the Plan ....................................................................................... 21
- Conclusion .......................................................................................................... 21

Chapter Summary ............................................................................................... 23

## CHAPTER 2—Clarifying Responsibilities and Performance Expectations .... 25
- Selecting a Management Structure .................................................................... 26
- Management Structure Within the District/State Operation ............................. 33
- Managing Conflict Between Supervisors ......................................................... 35
- When Conflict Warrants Special Attention ..................................................... 39
- Implementing a Performance Management System .......................................... 41
- Managing Employee Performance Problems .................................................. 51
- The Role of Staff in a Performance Management System ................................. 54
- The Problem of the Politically-Oriented District/State Director ....................... 56
- Conclusion .......................................................................................................... 58

Chapter Summary ............................................................................................... 59

## CHAPTER 3—Reaching Goals Through Coordination and Teamwork ........ 61
- The Difficulty of Staying on Track ..................................................................... 62
- Maximizing Effectiveness by Focusing on Strategic Priorities ......................... 62
CHAPTER 4—Fostering a Strategic Outreach Culture ............. 85
The Purpose of Strategic Outreach .................................. 86
Obstacles to Conducting Strategic Outreach ..................... 87
Creating an Outreach Culture ........................................ 88
Defining Strategic Outreach Objectives and Activities .......... 90
Identifying and Selecting Outreach Opportunities ................ 93
Evaluating Outreach: Learning from Experience ................. 95
Conclusion ...................................................................... 98
Chapter Summary .......................................................... 99

CHAPTER 5—Capitalizing on Scheduling Opportunities .......... 101
Strategic Scheduling Defined ............................................. 102
Six Steps to Developing and Implementing a Strategic Schedule .... 102
Staffing and Location of the District/State Scheduler ............. 110
Starting Points for District/State Schedules ......................... 112
A Model Procedure for Scheduling a District/State Trip ........... 113
Specific Staff Responsibilities .......................................... 116
Availability of Schedule Information ................................. 119
Addressing Common Problems ........................................ 119
Conclusion ...................................................................... 124
Chapter Summary .......................................................... 127

CHAPTER 6—Planning and Implementing Successful Events ..... 129
Proactive vs. Reactive Events ........................................... 130
Events on a Strategic or Proactive Schedule ......................... 130
Factors Affecting Event Planning ...................................... 133
Planning Individual Events ............................................. 135
Staff Communication and Coordination ............................. 140
Monitoring Progress ..................................................... 141
Evaluating the Results .................................................... 142
Conclusion ...................................................................... 145
Chapter Summary .......................................................... 146
CHAPTER 7—Maximizing the Casework Operation .................. 147
What is Casework? ............................................................. 148
The Casework Process......................................................... 149
Determining the Role and Priority of Casework............... 151
Developing Casework Policies and Procedures ............... 154
Managing Caseworkers....................................................... 167
Interacting with Departments and Agencies .................... 177
Managing and Monitoring the Casework System ............. 180
Non-Casework Constituent Services ................................. 186
Conclusion ........................................................................ 190
Chapter Summary............................................................. 191

CHAPTER 8—Defining and Identifying Projects Work ........... 193
Defining Projects Work ...................................................... 194
Clarifying Goals and the Role of Projects in Pursuing Them .... 197
The Staffing and Location of the Projects Function ............. 199
Defining Job Responsibilities and Coordinating Staff ........ 200
Getting Organized.............................................................. 202
Processing Project Requests .............................................. 207
Evaluating Requests .......................................................... 208
Project Identification ....................................................... 211
Tracking Projects ............................................................. 213
Award Announcements .................................................... 214
Conduct a Strategic Review of Projects ......................... 215
Conclusion ........................................................................ 216
Chapter Summary............................................................. 217

Index.................................................................................. 219

Authors............................................................................. 241

About CMF........................................................................ 243
| Figure 1-1: Pros and Cons of Planning Processes ................................................................. 10 |
| Figure 1-2: Impact Achievability Grid .................................................................................. 17 |
| Figure 1-3: Scorecard for Goal Evaluation ........................................................................... 18 |
| Figure 1-4: Goal-Oriented Action Plan ................................................................................ 20 |
| Figure 2-1: Model 1: Centralized Structure ........................................................................ 28 |
| Figure 2-2: Model 2: Washington–District/State Parity Structure ...................................... 29 |
| Figure 2-3: Model 3: Functional Structure .......................................................................... 30 |
| Figure 2-4: Pros and Cons of Management Structures ....................................................... 32 |
| Figure 2-5: Primary Responsibility for Managing State Operations (Senate Offices) .......... 37 |
| Figure 2-6: Primary Responsibility for Managing District/State Operations (House Offices) . 38 |
| Figure 2-7: Five Steps of Performance Management .......................................................... 41 |
| Figure 2-8: Sample Staff Self-Evaluation Form .................................................................. 47 |
| Figure 3-1: Urgency and Importance Matrix ....................................................................... 63 |
| Figure 3-2: Matrixing Typical District/State Office Activities ........................................... 64 |
| Figure 3-3: Satisfaction with Communication and Cooperation Between the District/State and DC Offices................................................................. 73 |
| Figure 3-4: Greatest Sources of Problems or Tensions Between the District/State and DC Offices........................................................................................................... 74 |
| Figure 5-1: Staff Responsible for Developing the Member’s District/State Schedule .......... 105 |
| Figure 5-2: How Often Members Go Home ........................................................................ 110 |
| Figure 5-3: Developing a District/State Schedule—A Model Timetable ......................... 114 |
| Figure 5-4: Sample Event Preparation Request Form ......................................................... 117 |
| Figure 5-5: Sample Event Scheduling Form ..................................................................... 125 |
| Figure 6-1: Formulating a Comprehensive Planning Checklist ......................................... 137 |
| Figure 6-2: Model Speech/Event Evaluation Form .............................................................. 144 |
| Figure 7-1: Office’s Definitions of Casework Encompass a Wide Range of Services ........ 157 |
| Figure 7-2: Most Important Factors of an Effective Casework Operation ....................... 167 |
| Figure 7-3: How Offices Staff the Caseworker Position ..................................................... 168 |
| Figure 7-4: How Offices Distribute Their Caseload ......................................................... 171 |
| Figure 7-5: Most Caseloads are Assigned by a Manager or Supervisor ......................... 172 |
| Figure 7-6: Offices Train Caseworkers in a Variety of Ways ............................................. 173 |
| Figure 7-7: Strategies Employed to Reduce Caseworker Burnout .................................... 177 |
Effective leaders don’t just do things right; they identify the right things to do — and the right people to do them. They anticipate change, stay ahead of it and manage it into an advantage.

The Society for Human Resource Management (SHRM) helps create and support such leaders. For more than 60 years, we have been the world’s largest organization devoted to promoting effective workplace policies and practices that leverage any organization’s greatest asset — its people.

Creating a professionally managed workplace — finding and retaining the best talent, investing in career development, conducting constructive performance reviews, and providing equitable benefits — is the way great organizations drive change and harness people’s full potential. Smart people policies contribute to lower turnover, higher morale, and greater staff satisfaction and loyalty.

That means more than just having happy employees leaving Capitol Hill every night and returning every morning: Research shows a direct correlation between employee satisfaction and productivity. In the case of a congressional office, high productivity means the kind of legislative results and constituent service that translate into success, term after term.

SHRM is privileged to partner with the Congressional Management Foundation in sponsoring *Keeping It Local*. As CMF recognized more than 20 years ago in setting the vision for this guide, an efficient and effective collection of congressional offices is vital to more than the individual Members of Congress. It benefits our entire nation, and honors the system of democracy that all Americans revere.

We hope this book inspires you and your colleagues to create a lasting legacy both through the work you do — and the way you lead.

Sincerely,

Laurence G. O’Neil
President & CEO
Society for Human Resource Management
March 2010
Preface

“All politics is local.”

The Honorable Thomas P. “Tip” O’Neill, Jr.

So goes the famous quote of the late Tip O’Neill, Speaker of the U.S. House of Representatives (1977–1986), after his first and only campaign loss in 1935. The next year he was elected to the Massachusetts House of Representatives, the first of 25 consecutive elections spanning 50 years of public service. In that half a century, O’Neill continued to hammer that message home to all aspiring candidates.

Nowhere is this lesson heeded more diligently than in the district and state offices of Members of Congress. It is here that members of the House of Representatives and Senate meet one-on-one with their constituents; here that caseworkers intercede with federal agencies on behalf of frustrated citizens. Grant proposals for local projects are researched in district and state offices, and plans for attending Rotary Club meetings, high school graduations, church services, plant tours and “traveling office hours” at the local shopping center devised.

Thus, CMF decided on the name, Keeping It Local, for the third edition of our guidebook for district and state offices. Like its companion, Setting Course, which is geared for the Washington offices of federal representatives, Keeping It Local is a product of more than three decades of knowledge gleaned from hundreds of staff training classes and office consultations, dozens of surveys and hours of diligent research to make sure we have captured all the best and most accurate advice.

Each chapter has been studiously examined for currency and applicability. New sections were added on handling employee performance problems, resolving conflicts in the office and managing additional constituent services, such as military academy nominations and tour and flag requests, while the chapter on technology was scrapped altogether as antiquated. The chapter on casework was extensively revised and expanded to reflect the growing demands on district and state offices for these services. Valuable information from the Congressional Research Service of the Library of Congress, the House Office of Employee Assistance and
the Society for Human Resource Management was incorporated to augment CMF’s own body of knowledge.

New charts and graphs were added with data from our 2009 survey of 130 District and State Directors, Chiefs of Staff and Deputy Chiefs of Staff to give offices a way to benchmark themselves against their counterparts. A handy list of “Dos and Don’ts” was appended to each chapter, and helpful icons and boxes of tips were sprinkled throughout for quick and easy reference.

Finally, the entire book was re-examined, re-ordered and refreshed, and a new graphic design incorporated for visual appeal. In addition to making Keeping It Local an invaluable source of advice, our goal was to make the book easy to read, the information effortless to access and apply, and the lessons simple to digest.

CMF’s mission for more than 30 years has been to help congressional offices run more effectively so Members and their staffs may better serve their constituents. Keeping It Local is the latest in our series of management guidebooks seeking to fill that mission.

Beverly Bell
Executive Director
Congressional Management Foundation
March 2010
Acknowledgments

Revising a guidebook last published more than 10 years ago is a significant and sometimes daunting task. The Congressional Management Foundation (CMF) would not have been able to produce the third edition of Keeping It Local without the assistance and dedication of the following individuals and organizations.

First, CMF would like to thank our partner, the Society for Human Resource Management (SHRM), whose generous sole sponsorship made this edition possible. As the world’s largest professional association devoted to human resource management, SHRM is dedicated to promoting effective management and leadership all over the globe. CMF is proud to work with them to offer management advice and techniques to individual House and Senate offices through this publication, our professional development training programs for senior congressional staff and our upcoming 112th Congress edition of Setting Course: A Congressional Management Guide. We also extend our gratitude to members of the SHRM Total Rewards, Employee Relations, Staff Management and Labor Relations Special Expertise Panels, who reviewed, edited and provided guidance on several chapters.

Keeping It Local also exists because of the participation and assistance of hundreds of congressional staff. CMF is indebted to the House and Senate staff who contributed to this edition, especially the District and State Directors, Chiefs of Staff and others who responded to our survey and shared their practices, advice, challenges and experiences. We offer special thanks to the staff who gave interviews and offered their expertise on a range of topics: Julie Merz, Office of the Assistant to the Speaker; Vincent W. O’Domski, Rep. Charlie Dent; Ann Peifer, Rep. Adam Schiff; Lisa Pinto, Rep. Henry Waxman; Tracee Sutton, Senator Kent Conrad; and Cathie Trevallee, Rep. Tammy Baldwin. By seeking input directly from the staff, we were able to target the advice in this book to their specific needs.

CMF is also appreciative of the assistance provided by the following institutional and support offices: Congressional Research Service, especially Eric Petersen; House Employment Counsel; House Office of Emergency Planning, Preparedness and Operations; House Office of Employee Assistance, especially Bern Beidel; Office of Compliance; Senate Chief Counsel
for Employment; Senate Employee Assistance Program; Senate Sergeant at Arms; and the United States Capitol Police.

Finally, I would like to thank all CMF staff for their support, guidance and patience during this process. Executive Director Beverly Bell provided leadership throughout the revision and was instrumental in its successful completion; Deputy Director Kathy Goldschmidt expertly researched and rewrote chapters and provided critical thinking on several others; and colleagues Tim Hysom and Collin Burden conducted research and were instrumental in the survey design and analysis. CMF management consultant Meredith Persily Lamel offered her expertise in current best practices; Chairman of the CMF Board of Directors and management consultant Ira Chaleff contributed his wisdom in key moments; and consultant John Sorrells provided critical thinking that helped define the structure and tone of this revision, and also contributed to and edited several chapters. CMF interns Emily Harig, Caitlin Mathis, Molly Powell, Yanning Sun and Van Van provided important assistance from the research and fact checking through the production stages. Thanks also to Rich Potter Design for conceptualizing and executing a new design and layout for this edition, giving new life and enhancing the usability and readability of this book.

CMF is grateful to all of these individuals and offices for their contributions of time and talent. This collaborative process enabled us to bring together the best possible guidebook for district and state offices.

Nicole Folk Cooper
Director of Research and Publications
Congressional Management Foundation
Editor, 3rd Edition of Keeping It Local
Introduction

The Challenges of Governing

When candidates run for the House or Senate, they usually know why they want to hold elected office. What many, if not most, fail to realize is that, once elected, they not only become a Senator or Representative. They also essentially become the chief executive officer of an organization. In cases where the transition is friendly, they take over an existing infrastructure. In cases where the transition is acrimonious, they face the formidable task of building a new organization from the ground up. In either case, a lot more is involved in transitioning to Congress than politics and the legislative process. Being a truly successful legislator also requires effective leadership and business management skills.

As with any start-up business, new Members face many management challenges in establishing their offices, including:

- Determining the vision, mission and goals that will guide their legislative and constituent service efforts;
- Deciding what organizational structure and chain of command will lead to the successful execution of the vision, mission and goals;
- Integrating or assembling a qualified and capable district/state and Washington, DC staff;
- Establishing policies and procedures that will enable staff to function at the highest possible levels of efficiency and effectiveness, often under extreme pressure and with demanding deadlines;
- Creating a fair and equitable method of compensating and rewarding staff; and
- Defining and managing the roles, responsibilities and relationship between the staff in the district or state and those in DC.

These important management tasks often get lost in the furor of activities faced by newly elected Senators and Representatives. Figuring out how things work on Capitol Hill, learning how the legislative process operates, filling the office with staff, purchasing supplies and equipment, and so
many other activities seem more urgent than establishing a strategic plan and clear policies and procedures. However, without a solid strategic underpinning, decisions are based on what other offices do or they are made in a vacuum. As a result, the decisions do not always serve the office well. Unfortunately, once made, they can be hard to undo and can result in management problems that can hinder an office’s effectiveness for a long time.

To help House and Senate offices avoid — or recover from — unwise management decisions, the Congressional Management Foundation offers this guide to running district and state offices and its companion, *Setting Course: A Congressional Management Guide*. While *Setting Course* focuses on the strategic management decisions generally made in Washington by the Member or Chief of Staff, *Keeping It Local* focuses on the strategic management decisions — and unique challenges — the State or District Director faces.

**The Need for an Equal District/State & DC Partnership**

In most ways, congressional offices operate as typical small businesses, but in one aspect, they are more like *large* businesses. Each Member of Congress maintains at least two offices: one in Washington, DC and the other(s) back home in the district or state. Many of these offices are thousands of miles and one or more time zones apart, but to best serve Members and constituents, they must function very effectively together. To do so, congressional offices — like any formal organization — must resolve, at a minimum, the following issues:

- How to maintain good communication among branches and employees;
- How to coordinate and monitor their activities;
- How to balance central control with autonomy;
- How to respect the distinct culture of each branch office while nurturing one unified, cross-organizational culture; and
- How to manage conflict constructively while cultivating teamwork and cooperation.

Approximately 40 percent of a Member’s personal office staffers are located in district and state offices, and most Senators and Representatives spend more than 40 weekends a year in their district/state. The fact that Members are investing so much time and so many resources in their
district/state offices underscores the need to manage these offices well. To maximize this investment, both the DC and district/state offices must steward their partnership. This must be a relationship of equals.

Unfortunately, it is a common mistake to view congressional district/state offices as entities almost completely separate from the Washington office. District/state offices must be accepted and be treated by their colleagues in DC as an integral part of the Member’s mission. Likewise, they must also view themselves as integral to the Member’s mission or they will not hold up their end of the partnership.

The Importance of the District/State Office

One very important aspect of an effective partnership between the offices is to understand the role and importance of the district/state operation.

In the past, the focus of congressional activity was in Washington. That was where the action was; and as a result, most of the staff were based there. However, that is no longer the case. District and state offices have increased in logistical, operational and political importance to Senators and Representatives. They perform nearly half the work, and comprise nearly half the staff, of the office. What is the cause of this shift of congressional work — and workers — to the districts and states? And what does it mean for the way congressional offices operate in the 21st century?

For starters, more federal government programs are affecting the lives of constituents, from Social Security to federally funded local projects. Additionally, states and cities have more control over how federal dollars are spent, which places demands on district/state staff to become engaged in how those funds are distributed. This results in a growing need for Members to become more involved in local matters.

Citizens are also becoming savvier about the legislative process through the explosion of information available. Whether it is televised floor or committee proceedings, 24-hour news channels or blog updates, what happens in Washington just does not seem so far away anymore. A congressional office may be able to distinguish between legislative activities in DC and casework or community outreach handled in the district/state; but constituents and local media might not. For many constituents and reporters, there is no difference between contacting DC or a district/state office — especially by email. Next door is the same as across the country.
In addition, technology has made Members and staff more accessible. Congressional offices can communicate electronically with more constituents more quickly than ever before and can directly engage them in public policy. Citizens are also using technology to stay informed of what their Senators and Representatives are doing and to make their voices heard. This results in greater coordination and awareness at the grassroots level, and constituents are turning out in greater numbers at Member events and appearances in the district/state.

Through all of this, constituent expectations for service and access to Members and staff have been raised and increased levels of service have become self-perpetuating. The more a congressional office does, the more it is expected to do. Members of Congress have responded to the demands by increasing the number of offices they operate back home, staffing those offices with more employees and giving them greater responsibilities for assisting individual citizens and entire communities through casework, special projects and other constituent services.

“Members’ offices are more and more sophisticated, and so are constituents’ expectations. Members and constituents alike depend increasingly on congressional staff back home to serve them effectively and efficiently. They’re an absolutely crucial part of our operation.”

— Chief of Staff

Common Differences Between District/State & DC Offices

As crucial as district and state offices have become, they are not always well understood by their counterparts in Washington. Nor do they always understand the DC staff as well as they should. This leads to tensions, miscommunications and management challenges that are among the most common and frustrating District/State Directors and Chiefs of Staff face. For the partnership to work effectively, it is very important for managers in both offices to understand, acknowledge and even embrace the differences between the district/state and Washington staff.

Members of Congress serve two basic roles in Congress. As legislators, Members participate in activities to develop and review the laws of the land. As ombudsmen, Members conduct the activities necessary to serve their constituents and represent their interests in the federal government. Though both the district/state and DC offices support Senators and Representatives in these roles, the bulk of the legislative work is conducted in DC and the bulk of the service-oriented work is conducted back home.
Members’ different roles in Washington and their district or state require them to run offices that perform correspondingly different functions. Often, this results in other differences, as well.

**Demographics.** CMF studies show that staffers in Washington tend to be younger — usually in their 20s or early 30s — often single, and almost evenly split between men and women. Turnover, particularly among junior-level staff, is exceptionally high. District/state staff, by comparison, tend to be at a different place in their lives, both personally and professionally. They are, on average, 40-years-old or about 10 years older than their Washington counterparts are. They are also more likely to be parents and more than 60 percent of district/state staff are women. Staffers in district/state offices also tend to have longer tenures than the DC-based staff.

The fact that the staffers in Washington and the staffers in the district/state tend to be at different places in their lives can lead to the same types of misunderstandings common in any diverse professional environment. The particular challenge of a congressional office, however, is that the differences tend not to be within a single office, but between two or more offices separated by distance. This makes it more difficult to foster understanding and acceptance of the differences.

**Pressures and priorities.** Though all congressional staffers feel significant pressure, staff in DC tend to feel most deeply the demands of politics and the legislative schedule, while those in the district/state feel greater pressure from the very human needs of constituents. Understandably, such disparate types of pressures breed different values and priorities.

Too often, Washington and district/state staffs resent each other because neither understands the other’s pressures and priorities. Many DC staffers consider their work crucial to national policy, while district/state staff are more inclined to see their work as crucial to constituent welfare and continued support for the Member. Washington staff wonder why no one answers the telephone in the district/state office after 6:30 p.m. District/state staff suspect that no one in Washington realizes they are working the entire Memorial Day weekend to help the Member at an event. Washington staff are annoyed when district/state staff call with casework-related questions during busy voting times. District/state staff are frustrated when their emails to Washington do not receive a prompt response. District/state staff believe the DC staff are out of touch with local politics,
while the Washington staff believe the district/state staff should be more knowledgeable about the legislative process.

Worse yet are the frustration and anger that build up when district/state staff feel they are being treated as second-class citizens. CMF encounters this situation frequently while conducting management engagements with congressional offices, and surveys of District and State Directors quantify the point. Both House and Senate respondents cited the “attitude of DC staff towards district/state staff” as the second most common source of problems or tensions between the offices.

Culture. The culture clash between the offices can be boiled down to the simplistic descriptors, “Inside the Beltway” and “Main Street.” Washington is a political, bureaucratic and international city, and, though they come from all over the United States, congressional staff in DC quickly become part of the type-A Capitol Hill culture once they arrive. District/state staff retain the culture of the people back home. This often leads to misunderstandings. For example, the DC staff sometimes feel the district/state staff are not dedicated enough to the Member’s success because they are not in the office at all hours. District/state staff, on the other hand, often feel the DC staff are completely out of touch with the people they are supposed to be serving.

The culture clash is often exacerbated by the fact that the Member, like staff, is to some degree different in the district/state than when in Washington. In the district/state, Members might adopt an approachable style and local traditions — things they need to be at ease with, and accepted by, their constituency. In Washington, Members must adopt professional and political styles appropriate to the culture of Capitol Hill and the city. They must be able to build relationships with their colleagues and employ legislative skills to accomplish the duties for which they were sent to Congress. As a result, the staffs often see the Member differently and more in line with the culture in which they exist.

The purpose common to both staffs is, of course, service to the Member and to their constituents. Nevertheless, because of their differences, the two staffs can easily lose sight of their shared purpose. This can lead to a lack of respect and an unraveling of communication and coordination that can significantly hinder the work of the office. The underlying problems that lead to such tensions must be resolved for the Member to effectively serve and represent his or her constituency.
A successful partnership requires that staff learn to recognize and respect each other's differences. Indeed, they must embrace the fact that, through their differences, they often complement each other's strengths and weaknesses, talents and interests. It is neither necessary nor even desirable that the partners be too much alike: their differences can be and often are a source of strength and creativity. District/state and Washington offices are distinct entities that bring critical skills to the work they must do in the interest of the Member and their constituents. Like partners in a good relationship, their staffs must acknowledge, respect and gain strength from the differences.

**Conclusion**

Whether a Member has one or multiple district/state offices, each functions as an integral part of the overall organization and is no less — and no more — important than the DC office. Failure to recognize the need for integration and consistency in management between the offices can only lead to confusion, dissension and inefficiencies in carrying out the mission of the Member. Members of Congress need good management and a good, strong, capable workforce to do their jobs well. Coordinating the widely varied activities of several offices — often hundreds of miles apart — is a tough management challenge, but a critical one to conquer. Through an equal partnership with the DC office and good management of the district/state staff and operations, District and State Directors play a crucial role in meeting this challenge.

Chapters 1–3 describe how to build a lasting partnership between Washington and district/state operations through planning and establishing a coordinated agenda; creating management systems that compel both the district/state and DC offices to monitor and adhere to that agenda; and employing communication practices that support its implementation.

Chapter 4 introduces the concept of strategic outreach, i.e., how district/state offices can be more than just reactive respondents to constituents’ requests. Staff can help further the strategic goals of their Senator or Representative — and the interests of constituents — through targeted outreach to strategic groups and stakeholders.

Chapters 5–8 provide guidance for managing some of the critical — and most strategic — activities of a district/state operation: scheduling, events, casework and projects. In addition to discussing how to implement effec-
tive procedures for conducting the reactive components of these activities, these chapters also address how to be proactive in these areas.

Through this book, it is CMF’s hope — and our objective — to provide congressional district/state offices with valuable information and guidance to make their operations as strategic and successful as possible so that they may serve Members and constituents as effectively as possible.
Creating a Coordinated Agenda

DO...

• Engage in strategic planning to set goals and priorities for the Member and staff, allocate resources and enable your office to be more proactive and effective.

• Integrate the district/state and DC goals into a coordinated agenda that encourages both offices to work together for improved teamwork and effectiveness.

• Consider the advantages and disadvantages of the basic planning methods (full-staff, liaison, small-group, hybrid) before choosing one that works best for your office.

• Assess the following to guide your planning: the Member’s personal goals and interests; district/state needs; office strengths and weaknesses; and opportunities and threats.

• Consider developing a two-year strategic plan, rather than just one-year, to take advantage of the full legislative cycle and to encourage comprehensive thinking for the entire congressional session.

DON’T...

• Allow the Washington and district/state staffs to pursue separate agendas, which increase the likelihood for conflict, tension and costly mistakes.

• Operate without a clearly-defined long-term vision of what the Member seeks to accomplish in Congress.

• Write a mission statement that is too broad (“to make a difference”) or establishes too many themes. The more focused it is (preferably one or two themes), the more direction it provides the staff.

• Include more than 3-5 short-term goals in your strategic plan. Single out what’s most important, most feasible and most consistent with the office’s mission statement.

• Draft an action plan without deadlines or assigning responsibilities. Specific timeframes and clearly-defined roles are essential to keeping everyone accountable and focused on the plan.
## Clarifying Responsibilities and Performance Expectations

**DO...**
- Weigh the advantages and disadvantages of each management structure against the styles, abilities and political skills of the Chief of Staff and District/State Director before selecting one that best suits the office's mission, goals and personnel.
- Spend the time to carefully consider which management structure is most appropriate for your district/state operation.
- Delegate district/state responsibilities by office functions or by office regions to prevent communications breakdowns, overlooked details and a lack of coordination.
- Lessen the likelihood of conflict between managers by clearly defining the roles, responsibilities and expectations of the Chief of Staff and District/State Director.
- Reap the benefits of improved staff performance and work product by following the five-step performance management system throughout the year.
- Foster in staff a greater commitment to the office and their work by having them draft their own job descriptions and performance criteria for their manager's review.

**DON’T...**
- Operate without a well-defined management structure. Conflict results when responsibilities, authority and accountability are not clearly outlined.
- Forget to regularly assess your management strategy and structure to ensure it continues to be responsive and viable given your current environment and personnel.
- Allow conflicts between offices and staff to go unchecked. Commit to resolving conflict in a positive manner.
- Assume that staff know their priorities and what’s expected of them. Clarify in writing their individual and office goals and how their performance will be evaluated.
- Discuss money in performance reviews. The purpose is for staff to reflect on their behavior and identify areas for improvement, not make the case for salary increases or bonuses. Deliver compensation decisions separately — before the reviews or well after.
- Overlook the value of non-monetary rewards for high-performing staff, which also serve as a motivator and morale booster.
Reaching Goals Through Coordination and Teamwork

DO...

- Develop systems and office practices that allow an office to work effectively and maintain its focus on strategic goals.
- Monitor progress on strategic goals in multiple ways: action plans; weekly, monthly and quarterly meetings; and regular progress reports.
- Hold all staff accountable by recognizing outstanding performers and addressing the sub-par work product of others.
- Use formal and informal strategies and communications to address the three fundamental obstacles to good interoffice relations: distance, different core functions and the drive for efficiency.
- Coordinate activities among all offices by scheduling annual planning sessions; promoting collaboration; and sharing news and information frequently.
- Create a good working relationship between the Chief of Staff and District/State Director through mutual respect and open, honest and frequent communication.

DON’T...

- Pursue a new and major initiative without scrutinizing how it would affect the strategic plan, goals and office resources.
- Let critical activities, such as planning and relationship building, be delayed by less important, but more pressing activities.
- Undertake a major project without first drafting a comprehensive action plan that includes tasks, responsibilities and deadlines.
- Try to cram project work into a single weekly staff meeting. If extensive planning or discussion is required, schedule another meeting with the relevant staffers.
- Confuse a communications channel with a command channel. Directives and decisions should follow the prescribed chains of command, but simple requests and information exchanges should be common and routine among staff.
**SUMMARY**

**DO...**

- Foster a proactive mindset and creative thinking among staff by incorporating outreach priorities into staff meetings, group discussions and job descriptions or performance goals.

- Define a framework for identifying outreach objectives and prioritizing opportunities by incorporating the results from a stakeholder analysis and/or SWOT analysis.

- Analyze the office’s relationship with stakeholders to determine which ones need to be cultivated or strengthened.

- Assess the environment when developing outreach strategies to capitalize on the office’s strengths and opportunities and mitigate its weaknesses and threats.

- Ensure proposed outreach: furthers the office’s strategic goals; is a valuable and beneficial use of resources; is likely to achieve press goals and reach desired stakeholders; and can overcome obstacles to their success.

- Evaluate outreach activities using internal and external feedback to learn from the experience and conduct more successful activities and decision-making in the future.

**DON’T...**

- Fall into a reactive or comfortable pattern in which the office focuses solely on incoming requests and relies too heavily on core supporters.

- Allow staff to view outreach as calculated or inappropriate when it is actually strategic and can make the office more effective in serving constituents.

- Limit outreach activities to the Member. Staff must help establish and expand the Member’s presence and image in the community, communicate the Member’s message and attain the Member’s goals.

- Forget to solicit input from the DC staff when developing outreach plans. There are important roles for both offices to play in these activities.

- Undertake new outreach activities without evaluating them against your strategic objectives and determining if trade-offs need to be made with existing activities.

- Use after action reviews as a tool to assign fault or blame when activities do not go as well as planned.
DO...

- Develop and implement a scheduling system that advances the Member’s strategic goals by:
  1. defining office goals;
  2. evaluating the impact of office goals on scheduling;
  3. communicating goals to staff;
  4. assembling the scheduling team;
  5. developing scheduling criteria; and
  6. conducting a strategic review.

- Determine roles and responsibilities for the Scheduler(s) and other staffers on the scheduling team.

- Carefully consider the Member’s travel schedule and the distance from DC to the district/state before hiring and deciding where to locate the person responsible for district/state scheduling.

- Forecast a long-range scheduling plan for either the first session or the entire upcoming term.

- Establish procedures for the planning and execution of district/state travel, including timeframes and staff assignments.

DON’T...

- Rely on reactive scheduling, where the office simply responds to invitations or requests. Instead, actively seek and create opportunities to achieve goals.

- Neglect to get feedback from event attendees through surveys or candid assessments. Knowing what went right and wrong can improve future scheduling trips.

- Overschedule. Schedulers must learn to say “no” diplomatically and take the heat because of it. While schedules are necessarily busy, a hectic campaign-like pace is not always required.

- Wait too long to respond to invitations, which angers those who are inviting you, nor reply too quickly, which might result in last-minute cancellations. Learn to balance these competing challenges.

- Let conflict between the Member’s family and staff fester and grow by ignoring or avoiding it. Set up ground rules for the family’s involvement in scheduling and how staff should interact with them.
Planning and Implementing Successful Events

DO...

- Consider the Member’s style, preferences, abilities and weaknesses and pitch events that play to the Member’s strengths.

- Take into account how the district/state’s density, geography and constituent demographics can impact event planning.

- Create events that draw upon the skills and abilities of staff and understand their limitations before planning or committing to an event.

- Ensure that the Member and staff agree on concrete, measurable objectives for each event before proceeding.

- Encourage regular communication and coordination between all staff involved in the event, especially the lead coordinator and Scheduler.

- Evaluate the office’s overall event plan as well as the individual events to assess performance and learn from the experiences.

DON’T...

- Rely on a single type of proactive activity — various events tend to draw different audiences, serve different purposes and offer different benefits.

- Forget the tiny details when planning individual events. A comprehensive action plan that spells out every task will help prevent unexpected surprises and last minute glitches.

- Neglect to use events as an opportunity to develop new skills in staff or draw upon their little-known or unused abilities.

- Underestimate the importance of deadlines, which are critical in keeping staff accountable for their assignments and the event on track.

- Create complicated event evaluations — overly ambitious or lengthy assessments are usually ignored or not completed.
### Maximizing the Casework Operation

#### DO...
- Determine and communicate a clear definition of casework.
- Assess environmental and political factors, and the Member’s goals and interests, when determining the role and priority of casework.
- Develop clear policies and procedures for conducting casework.
- Take care to effectively hire, train and manage your Caseworkers.
- Maintain high-quality, up-to-date constituent and case information, agency information and public information about casework.
- Clearly define the relationship and tone Caseworkers should establish with the agencies they interact with.
- Regularly produce and review casework reports from the constituent database.
- Revise casework policies and procedures based on changes in the Member’s priorities, caseloads, and the needs of constituents.

#### DON’T...
- Allow changes in casework volume to have significant impact on the quality of casework.
- Neglect to enforce casework policies and procedures and keep all Caseworkers operating in the same way.
- Forget to provide Caseworkers opportunities to let off steam so they do not burn out.
- Miss opportunities, such as seminars and CRS programs, to enhance Caseworkers’ knowledge.
- Use casework reports to shame Caseworkers or pit them against one another.
- Fail to conduct a thorough review of casework priority, policies and procedures annually or biennially.
- Neglect to establish clear policies and procedures for other constituent services, such as military academy nominations, letters of commendation and tour and flag requests.
### Defining and Identifying Projects Work

<table>
<thead>
<tr>
<th><strong>DO...</strong></th>
<th><strong>DON’T...</strong></th>
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<tbody>
<tr>
<td>• Clarify the Member’s goals and how projects can advance them to help</td>
<td>• Allow the work of projects staff to evolve over time without any clear direction from management or</td>
</tr>
<tr>
<td>determine the priority of projects work among office operations and the</td>
<td>without targeting the work toward the Member’s strategic goals.</td>
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<tr>
<td>resources that should be allocated to it.</td>
<td>• Act on a request without first obtaining the most complete and accurate information possible to</td>
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<td>ensure the office makes an informed and calculated decision.</td>
</tr>
<tr>
<td>• Define projects work by considering the following: the Member’s goals;</td>
<td>• Process projects and grants requests without first understanding the House and Senate rules that</td>
</tr>
<tr>
<td>district/state needs; constituent perceptions and attitudes; delegation</td>
<td>govern this activity.</td>
</tr>
<tr>
<td>and local politics; and jurisdiction.</td>
<td>• Neglect to capture the processes and procedures of projects work in the office’s constituent</td>
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<td>services manual to help ensure the consistent recording and tracking of this information.</td>
</tr>
<tr>
<td>• Weigh the pros and cons of basing projects staff in the district/state</td>
<td>• View projects work as only reacting to incoming requests. Enhance outreach efforts by proactively</td>
</tr>
<tr>
<td>or in DC and select the location that best supports your goals.</td>
<td>seeking and identifying projects that reflect the office’s goals.</td>
</tr>
<tr>
<td>• Clearly define, communicate and coordinate the job responsibilities of</td>
<td>• Fail to measure the overall success of projects work as it relates to the office’s broader agenda.</td>
</tr>
<tr>
<td>projects staff to minimize confusion and conflict in the office.</td>
<td>Conduct an annual review to analyze the office’s process and if changes are needed.</td>
</tr>
<tr>
<td>• Assess the overall public interest in the project, as well as the</td>
<td></td>
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<tr>
<td>group/individual making the request and the politics surrounding the</td>
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<tr>
<td>issue, to determine the appropriate response for your office.</td>
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<tr>
<td>• Develop a strategy for announcing awards to improve staff coordination</td>
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<tr>
<td>and timeliness and ensure the Member gets proper credit.</td>
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</tbody>
</table>
Index

A
Action plans, 65–66, 84
  assigning responsibilities in, 19
  development of, 19–21, 23, 65
  for events, 136–138, 141–142, 146
  function-oriented, 20–21
  goal-oriented, 19–21
  meetings, review at, 68–69
Ad hoc planning meetings, 67
Advance work, event, 137
Advisory boards, Member involvement with, 132–133
Advocacy
  by Caseworkers, 178–180
  by projects staff, 196–197
Agencies, federal. See Federal agencies, cases with
Appropriations
  handling requests for direct, 195, 201
  reauthorization of programs, 201
  reports on, 201
Archiving of casework files, 163–167
Authorization, casework, 149

B
Benefits, federal, 148
Bonuses, 50–51, 69, 77
Brainstorming, outreach initiatives, 89–90, 92, 212

C
Case, definition of, 156–157
Case information, 180–181. See also Constituent database
Casework, definition of, 148–149
Casework in a Congressional Office: Background, Rules, Laws, and Resources, 180
Casework management reports, systematic review of, 182–184
Casework manager/supervisor
  cases assigned by, 171–172
  casework manual, role in development of, 156
  Caseworker consultation with, 162–163
management and monitoring of casework system by, 180–186
positive reinforcement for Caseworkers, 176
Casework manual
components of, 156–167
development of, 155–156
projects staff responsibilities included in, 201, 217
training, used for, 173
updates, 158
Casework operations, 147–191. See also Casework policies and
procedures; Caseworkers
accurate information, access to, 180–182, 191
departments and agencies, interacting with (See Federal agencies,
cases with)
effective operations, factors in, 167
ethics issues, 178
interns, role in, 158
legislative response, indications of need for, 185
management and monitoring of system, 180–186
Member and, 151–152, 158, 176, 180
priority of, 151–154, 191
privacy release form, obtaining, 149, 150
proactive outreach, 86, 90, 149, 152–154, 185
reactive, 149
role of, 151–154
time-sensitive requests, 149
types of cases, 148, 183
Casework policies and procedures, 147, 149–151, 191. See also Casework
manual; constituent database; letters to constituents
action taken in case, 150
assessment and adaptation of, 185–186, 191
authorization to access constituent records, 149
casework data, systematic review of, 182–184
development of, 154–167
documentation of cases, 163–167
filing and archiving of cases, 163–167
follow-up of open cases, 161, 183–184
initiation of cases, 159–160
intake, 149, 156–158, 169–170, 183
keeping constituent informed on case, 162
managing constituent expectations, 162
outgoing correspondence, review of, 160–161
resolution of case, 149, 183, 184
supervisor, guidelines for consultation with, 162–163
timeframes for assignment/action initiation, 158–159
unrealistic standards for, 159
Caseworkers. See also Casework operations
as advocates, 178–180
assignment of cases, 158–159, 171–172, 175, 177
burnout, management of, 148, 175–177, 191
caseload of, 153–154, 170–171, 183–185, 191
discussion of cases, outlets for, 175–177
distribution of casework to, 169–171
flexible schedules for, 176–177
generalist, 168–170
hiring, 172–173
as liaisons, 178–179
management of, 167–177
Member schedule, role in setting, 111
monitoring of casework, role in, 184–185
non-Caseworker duties, 175, 177
policy/procedure development, role in, 155–156
positive reinforcement for, 176–177
projects staff, work with, 201–202
specialist, 168–170
training, 155, 173–175
Catalog of Federal Domestic Assistance, 203
Centralized management structure, 27–28, 32
Chain of command, 31, 84. See also Management structure
Chief of Staff (CoS), 36–38
  casework, role in, 162
centralized management structure, role in, 27–28
delegation of responsibility by, 33
District Director/State Director, relationship with, 27, 35–36, 75, 84
district/state office, role in, 26–27, 36
event planning, role in, 139
interoffice communications, role in, 76
Member schedule, role in setting, 101, 104–105, 107, 119
project staff, work with, 202
staff evaluation, role in, 45–46
staff meetings, participation in, 68
staff reporting directly to, 26–29, 32
CMF. See Congressional Management Foundation (CMF)
Coaching, one-on-one, 44–45
Collaboration, staff, 76–77
Committee on Standards of Official Conduct, House, 178
Communications, staff
  casework, 182
  conflict management and, 35
District/State Director and staff, 57–58
encouragement of, 76
events planning, 140–141
interoffice (See Interoffice relations)
job assignments, 55
management structure, staff understanding of, 31
Member, CoS, DD/SD, 75
methods of, 77–78
office goals, communicating, 103
Communications Director, 30
  casework, role in, 162
  Member schedule, role in setting, 101, 103, 105, 107, 115, 118–119
  project staff, work with, 201
Communications with constituents/community. See also Letters to constituents; media
  outreach initiatives, 89, 96
  projects work, 207, 208, 212–213
  Scheduler/constituent, 109, 120–121
Community development, projects work on, 196
Community files, 206–207
Community office hours, 131
Compensation
  bonuses, 50–51, 69, 77
  performance, linked to, 50–51, 69, 77
  staff evaluation meeting and, 50, 59
Conferences, Member participation in, 133
Conflict between district/state and Washington offices. See Interoffice relations
Conflict management, 35–41, 59
  employee assistance programs, 39–41
  formal dispute resolution, 39
  methods of, 40
  serious disputes, 39–41
  between supervisors, 35–39
  training programs, 39–41
Congratulations, letters of, 157, 189
Congressional Accountability Act, 42
Congressional Management Foundation (CMF)
   Online Town Hall Meetings: Exploring Democracy in the 21st Century, 132
   Resources from, 56, 132, 155, 173
   Services from, 13, 40, 41, 81–82, 90
   Setting Course: A Congressional Management Guide, 56
   Training by, 155
Congressional Research Service (CRS), 77, 174–175, 180, 203
Congressional Quarterly (CQ), 77
Constituent and case information, 180–181. See also Constituent database
Constituent database, 164–165, 174, 181
   contact with constituents, reminders for, 162
   projects work, used for, 204–206, 214
   systematic review of, 182–184
Constituent services, 56–57, 87–88. See also Projects work
casework (See Casework operations)
non-casework services, 186–190
Constituent services director, cases assigned by, 171–172. See also Casework manager/supervisor
Constituent services manual. See Casework manual
Constituent services representatives. See Caseworkers
Constituents
casework (See Casework operations)
   communications with (See Communications with constituents/community)
   event feedback from, 143
   projects work (See Projects work)
scheduling issues and, 109, 111, 127
Consumer complaints/issues, assistance with, 157
Coordinated agenda, 1–23. See also Coordinated strategic planning process
carrying out agenda (See Goals, meeting strategic; Outreach, strategic)
importance of, 4–6
value of planning, 2–4
Coordinated strategic planning process, 6–18, 23
action plans, development of, 19–21
effective planning session, tips for, 12–13
full-staff process, 8–10
goal development, 15–16
goal evaluation, 16–18
hybrid approach, 10–11
liaison process, 9, 10
Member, role of, 12
mission statement, 13–15
objectives of, 7
perspectives for consideration in, 7–8
planning time frame, 11–13
small-group process, 9–11
CoS. See Chief of Staff (CoS)
Counties. See Regions of district
Covey, Stephen, 63
CRS. See Congressional Research Service (CRS)

D
DD/SD. See District/State Director (DD/SD)
Delegation of responsibilities, 33–34
Demographics of district, effect on casework of, 151
Direct appropriations, handling requests for, 195
Disability claims, 148
Disaster assistance, 149
Dispute resolution. See Conflict management
District/state. See also Regions of district
  characteristics as factor in event planning, 134, 146
demographics of, 151
distance from Washington, 26, 111, 127
Member visits to, 75, 109–111
needs and interests of, 7
District/State Director (DD/SD), 36–38
casework, role in, 156, 162, 163, 172, 176
Chief of Staff, relationship with, 27, 35–36, 75, 84
delegation of responsibility by, 33
event planning, role in, 136, 138–139
interoffice communications, role in, 76
Member schedule, role in setting, 101, 104–107, 111–112, 118
politically-oriented director, problem of, 56–58
projects work, role in, 202, 210
reporting to Member or Chief of Staff, 26, 28, 30, 36
schedule of, 57
staff evaluation, role in, 45–46
staff meetings, participation in, 68
staff reporting to, 26, 29, 32

District/state office
action plan, responsibilities assigned in, 19
functional or regional organization, 26
management structure within, 33–35
Member visits to, 75
primary responsibility for managing operations, 37–38
projects staff, 199, 217
staff meetings, inclusion in, 66
strengths and weaknesses of, 7–8

District/State Scheduler. See Scheduler, district/state

Documentation
of casework, 163–167
of employee monitoring, feedback, and coaching, 45
of employee performance problems, 52
employee personnel file, evaluation review of, 46

E
Email
constituent communications, 162
contact information, 204–205
staff communication, 77–78
Earmarks, handling requests for, 195
Economic development, projects work on, 195–196, 207
Economic issues, casework related to, 151
Emergencies, casework related to, 151, 158
Emergency Planning, Preparedness and Operations, House Office of, 139
Employee assistance programs, 39–41, 52–54
Employee performance goals, 41–43, 55
Employee performance management. See Performance management system
Environment, consideration of external, 8, 92, 99, 151, 191
Environmental issues, projects related to, 196
Ethic issues, casework, 178
Evaluations
casework system, 185–186, 191
employee (See Evaluations, employee)
event, 127, 142–146
interoffice relations, 80–82
outreach initiatives, 95–97
project requests, 208–211, 217
projects work, overall success of, 215–217
strategic schedule, 109–110, 127
Evaluations, employee
  follow-through on evaluation and preparation for next year, 50
  formal evaluation meetings, 45–50, 52
  performance appraisal criteria, employee’s, 55–56
  performance problems, discussion of, 48, 52
  self-evaluation, 45–47
  staff collaboration as factor in, 76–77
Events, 129–146. See also Scheduling, strategic
  action plan for, 136–138, 141–142, 146
  advance work, 137
  checklist, 137
  evaluating results of, 127, 142–146
  event preparation request form, sample, 117
  event scheduling form, sample, 125
  factors in planning for, 133–135, 146
  follow-up, 137
  individual events, planning of, 135–140, 146
  logistics, 137
  media coverage of (See Media)
  monitoring progress of preparation for, 141–142
  objectives of, 135–136, 146
  outreach and, 135
  proactive, 102, 108, 114, 130–133, 146
  program, 137
  reactive, 108, 114, 130
  requests for Member participation, responses to, 109, 111, 120–122
Scheduler, role of, 141, 146
scheduling based on, 112–113
security, 139
staff capabilities, utilization of, 135
staff communication and coordination, 140–141, 146
staff responsibility, assignment of, 136, 138
strategic plans and, 135
time frame for, 136
Exchanges, interoffice staff, 79, 175
External environment. See environment, consideration of external
Federal agencies, cases with, 157, 177–180, 191
   access to accurate agency information, 180–181, 191
   advocate, Caseworker as, 178–180
   casework seminars, agency, 174, 179
   ethics issues, 178
   follow-up with, 161, 183–184
   liaison, Caseworker as, 178–179
   visits to agency, 179
Federal agencies, projects staff work with, 196–197, 213
Federal benefits, 148
Federal Register, 212
Field hearings, 133
Field Representatives, 56–57
   event planning, role in, 136
   Member schedule, role in setting, 101, 103–105, 107, 111
   project staff, work with, 201–202
   scheduling responsibilities, 118
Filing systems
   casework, 163–167
   projects work, 206–207
Flag requests, 157, 190
Follow-up
   after scheduled events, 116
   casework, 161, 183–184
   employee evaluation, 50
   employee performance problems, 54
   events, 137
Form letters, 159–160
Formal dispute resolution, 39
Foundation Center, 203
Full-staff strategic planning process, 8–10
Function-oriented action plans, 20–21
Functional management structure, 30–33

Goals, employee performance, 41–43, 55, 77
Goals, meeting strategic, 61–84. See also Interoffice relations; outreach, strategic; work management
   measuring office performance, 71
   meetings, discussion of progress at, 66, 67, 84
priorities, focus on, 62–65
progress reports, 67–68, 84
retaining focus on goals, 62
staff, role of, 78, 87–88
timelines, use of, 69

Goals, strategic. See also Strategic planning
carrying out goals (See Outreach, strategic)
development of, 15–16, 23
evaluating, 16–18
goal-oriented action plan, 19–21
impact achievability grid, 16–17
integrated, 5
meeting goals (See Goals, meeting strategic)
projects work and, 197–199, 212, 217
setting, 2–3
strategic scheduling and, 101–103, 108
written, 3

Grants, 86, 188–189, 194–195
announcements of, 195, 201, 207
contacts for, 204–205
identifying possible, 212
letters of interest or support for, 157, 194, 209–210
reference materials and information on, 202–203

Greetings, letters of, 189

H
Hill, The, newspaper, 77
Hiring procedures, 75, 172–173
House Committee on Standards of Official Conduct, 178
House Employment Counsel, Office of, 42
House Office of Emergency Planning, Preparedness and Operations, 139
House Office of Employee Assistance, 40–41, 52, 53
House offices. See also District/state office
casework definitions, 157
primary responsibility for managing operations, 38
HouseNet, 77
Housing issues, 149, 157
Hybrid approach to strategic planning, 10–11
Hybrid management structure, 31

I
Immigration services, 148
Impact achievability grid, goal, 16–17
Industry files, 207
In-person town hall meetings, 131
Interim planning session, 11
Interns, casework handled by, 158
Interoffice relations, 5–6, 23, 64–65, 84
  assessments of, 80–82
  communication problems, acceptance of, 73–74
  coordinating work between offices, 3, 6, 71–72, 84
  cross-promotions of staff, 78
  improvement, techniques for, 74–80
  informal communications, 78–79
  obstacles to, 71–74
  personal relationships between offices, 78–80
  staff exchanges, 79, 175
  teams, interoffice, 78
J
Job creation, projects work on, 195–196
Job descriptions. See Position descriptions
L
Land use issues, projects work on, 196
Law Enforcement and Security Operations, Senate Office of, 139
Legislative Director
  Member schedule, role in setting, 107
  projects staff, work with, 201
  reporting to Member or Chief of Staff, 28, 30
  staff meetings, participation in, 68
Legislative Information System (LIS), 77
Legislative initiatives, 5, 185, 201–202
Legislative resources, 77
Legislative staff, scheduling responsibilities of, 118, 119
Letters of support to granting agencies, 157, 194, 209–210
Letters to constituents
  cases, updates on, 162
  congratulations, 157, 189
  form letters, 159–160
  monthly reports on, 183
  original letters, 159–160
  outgoing correspondence, policies for reviewing, 160–161
  presidential greetings, requests for, 189
projects requests, responses to, 208, 210
recommendations, 157
special recognition, 157, 189

Liaison
  Caseworker as, 178–179
  strategic planning process, 9, 10
Local issues, assistance with, 157, 189
Localities, project work with, 198–199, 204–205
Locations, scheduling based on, 113
Logistics, event, 137

M
Management structure
  centralized model, 27–28, 32
  within district/state operation, 33–35
  factors to consider in, 26–27, 59
  functional model, 30–32
  hybrid model, 31
  parity model, 29, 32
  selecting, 26–33
Management tasks. See Work management
Managers. See Supervisors
Matchmaking, 211
Media
  coverage of events, 108, 115, 118–119, 133, 134, 137
  event evaluation, used for, 143
  projects work and, 199, 207–208
Mediation by projects staff, 196–197
Meetings, constituent. See also Events
  staff participation in, 97
  strategic initiation of, 86
  town hall meetings, in-person/telephone/online, 131–132
Meetings, staff, 57, 84. See also Planning sessions
  ad hoc planning meetings, 67
  casework discussed at, 182
  effective, 70
  functional meetings, 67
  individual staff members, meetings with, 68–69
  interoffice relations, quarterly meetings on, 80
  senior management meetings, quarterly, 68, 75
  strategic outreach, discussion of, 89–90
strategic planning meetings, monthly, 68
weekly, 66–67, 182
Member
casework, role in, 151–152, 158, 176, 180
Chief of Staff and District Director/State Director, communications
with, 75
conflict resolution, role in, 40
district/state, visits to, 75, 109–111
District/State Director's role, communications with staff on, 57–58
district/state office morale, role in, 75
event evaluation, role in, 143
event planning, effect of Member's style on, 133–134, 146
managerial role of, 26–33, 37–38
military academy nominations, role in, 188
mission statement of, 13–15, 23
outreach, role in, 88, 99
personal goals and interests of, 7
planning session, role in, 12
position descriptions, role in setting, 55
projects work, role in, 195, 198, 200, 209
schedule of (See Scheduling, strategic)
staff meetings, participation in, 68, 75
staff reporting directly to, 26–32, 36
strategic goals, role in meeting, 68
strengths and weaknesses of, 7–8
website of, 181–182
Member's family, Member schedule and, 104–106, 116, 122–123, 127
Military personnel, reassignment requests from, 148
Military service academy nominations, 157, 186–188
Mission statement, 13–15, 23
Monthly progress reports, 67–68
Mortgage intervention, 157

N
National Archives, file storage by, 166
National Journal, 77

O
Office. See District/state office; House office; Senate office; Washington office
Office of Emergency Planning, Preparedness and Operations, House, 139
Office of Employee Assistance, House, 40–41, 52, 53
Office of Law Enforcement and Security Operations, Senate, 139
One-year strategic plan, 11
Online town hall meetings, 132
Open office hours, 131
Outlook, contact list in, 204–205
Outreach, strategic, 85–99
    beyond core supporters, 88
casework, 86, 90, 149, 152–154, 185
creating a culture of, 88–90
defining objectives and activities, methods of, 90–93, 99
evaluation of, 95–97, 99
event planning and, 135
identifying and selecting opportunities for, 93–95
Member, role of, 88, 99
obstacles to conducting, 87–88
projects work, 193, 197–199, 206–207, 211–213
purpose of, 86–87, 99
scheduling and, 108
Outside meeting facilitator, use of, 13
Overscheduling, 120–121, 127

P
Parity management structure, 29, 32
Passport problems, 148
Pay. See Compensation
Performance appraisal criteria, employee's draft of, 55–56
Performance Improvement Plan, 48, 69
Performance intervention, employee, 52–53
Performance management system. See also Performance problems,
    management of employee
    compensation and, 50–51, 69, 77
documentation, 45, 46, 52
follow-through on evaluation and preparation for next year, 50
formal staff evaluation meetings, 45–50, 52
implementation of, 41–51, 59
monitoring progress/providing feedback, 43–45
performance evaluation criteria, employee’s, 55–56
performance goals, establishing, 41–43
performance problems, discussion of, 48, 52
recognition of high-performing staff, 50–51, 68–69
self-evaluations, 45–47
staff, role of, 54–56
termination and, 48
Performance problems, management of employee, 51–56, 68–69
consultation with employee assistance service, 52
documentation of performance, 52
follow-up, 54
formal evaluation meeting, 48
observation of employee, 52
performance intervention, 52–53
personal issues, 51, 53
referral, 53–54
Personnel file, performance documentation in, 45, 46
Planning
of events (See Events)
outreach initiatives, adequacy of plans for, 96, 97
strategic (See Strategic planning)
value of, 2–4
Planning meetings. See also Planning sessions, strategic
ad hoc, 67
monthly strategic, 68
Planning sessions, strategic
casework operations, review of, 185–186, 191
effective session, tips for, 12
interoffice relationships, discussion of, 75, 80
location for, 12
Member, role of, 12
outreach, setting priorities for, 89
outside facilitator, use of, 13
participation in, 12, 88
preparation for, 12
projects work, review of, 215–217
time frame for, 11, 12, 23, 75
Policy resources, 77
Político, 77
Politics
casework and, 151, 152, 184, 191
future goals, planning for, 8
politically-oriented director, problem of, 56–58
projects work and, 198
staff inclusion in political decisions, 57–58

Position descriptions
  employee draft of, 54–55, 59
  finalization of, 55–56
  projects staff, 200–202
  staff collaboration as component of, 77
  trading staff assignments, 55

Postal service inquiries, 157

Presidential greetings, requests for, 189

Press. See Media

Press Secretary. See Communications Director

Press staff. See Communications Director

Priorities
  maximizing effectiveness by focus on, 62–65
  projects work, 208, 211
  setting, 2
  shifting, 3
  strategic outreach and, 86, 89
  urgency and importance task matrix, 63–64

Privacy release form, casework, 149, 150

Professional development, 44, 203. See also Training programs

Progress reports, weekly or monthly, 67–68, 84

Projects Director, 199

Projects work, 193–217. See also Grants
  action plan for project, 208
  advocacy, 196–197
  appropriations, 195
  award announcements, 195, 201, 207, 214–215, 217
  community development, 196
  contacts, organizing, 204–205
  definition of, 188–189, 194–197, 217
  economic development, 195–196
  environmental issues, 196
  evaluating requests, 208–211
  filing system for, 206–207
  goals, clarification of, 197–199, 212, 217
  grants, 194–195
  identification of projects, proactive/reactive, 211–213
  intake, standardized procedures for, 205–209, 217
  job creation, 195–196
  land use issues, 196
location of project function, 199–200, 217
matchmaking, 211
mediation, 196–197
organization of, 202–208
outreach, 193, 197–199, 206–207, 211–213, 217
priorities, 208, 211
processing requests, 207–208
reference materials and information for, 202–204
referrals, 189, 211
review, strategic, 215–217
staff responsibilities for, 199–202, 217
tracking projects, 213–214
Promotions, staff, 77, 78
Public information, access to accurate, 180–182

R
Recommendation, letters of, 157
Referrals, 157, 189, 211
Regions of district
  casework, reports on, 184
  casework specialization by, 170
  management structure, region-oriented, 33–34
  projects work and, 198, 212
Resources, legislative and policy, 77
Rewards for high-performing staff, 50–51, 59, 68–69, 77
Roll Call, 77
Roundtable events, 133
Rural areas, planning events for, 134

S
Scheduler, District/State, 30, 101, 103–107, 119, 127
  common problems of, 120–124, 127
  complete information on event, obtaining, 123–124
  constituents, relationship with, 109, 111, 120–121, 127
  event coordinator, relationship with, 141, 146
  Member's family, relationship with, 106, 122–123, 127
  responsibilities of, 116–118
  staffing and location of, 110–112
Scheduler, Washington, 111–112, 141
Scheduling, strategic, 86, 101–127
  availability of schedule information, 119
common problems of, 119–124, 127
community or open office hours, 131
complete information on event, obtaining, 123–125
definition, 102
development and implementation of schedule, 102–110
evaluation of, 109–110, 127
event preparation request form, sample, 117
event requests, response to, 109, 111, 120–122
event scheduling form, sample, 125
goal setting and, 101–103, 108
individual appointments, 131
long-range plan, 112, 127
Member, input of, 104, 120–122
model procedure for, 113–116
proactive schedule, 102, 108, 114, 130–133
reactive schedule, 108, 114, 127
scheduling criteria, 107–109
scheduling team, 101–107, 127
staff responsibilities, assigning, 116–119, 127
starting points for, 112–113
town hall meetings, in-person/telephone/online, 131–132
weekday events, 121
SD. See District/State Director (DD/SD)
Security, event, 139
Self-evaluations of performance, 45–47
Senate Chief Counsel for Employment, 42
Senate Employee Assistance Program, 40–41, 52, 53
Senate office. See also District/state office
casework definitions, 157
district/state office, structure of, 34
management structure, 31
primary responsibility for managing operations, 37
projects staff, 199–200
staff meetings, 66
Senate Office of Law Enforcement and Security Operations, 139
Senate Select Committee on Ethics, 178
Senator. See Member
Senior management meetings, quarterly, 68, 75
Setting Course: A Congressional Management Guide, 56
Seven Habits of Highly Effective People, The, 62–63
Site visits, 132
Small business assistance, 149
Small-group strategic planning process, 9–11
Special projects, 86
Special recognition, requests for, 157, 189
Speech evaluation form, 144
Staff collaboration, 76–77
Staff exchanges, interoffice, 79, 175
Staff meetings. See Meetings, staff
Staff surveys, 80–82
Staff training. See Training programs
Stakeholder analysis, 90–93, 99, 212
State administering agencies, 204–205
State Director (SD). See District/State Director (DD/SD)
States
   casework related to, 157, 189
   projects work with, 198–199, 204–205
Strategic goals. See Goals, strategic
Strategic outreach. See Outreach, strategic
Strategic planning, 8, 23
   annual/biennial meetings for (See Planning sessions, strategic)
   carrying out plan (See Outreach, strategic)
   casework system, review of, 185–186, 191
   coordinated planning process for (See Coordinated strategic planning process)
   event planning and, 135
   implementation of plan, 21
   monthly meetings, 68
   projects work, review of, 215–217
   scheduling, long-range plan for, 113, 127
   single plan for district/state and Washington offices, 6
   strategic scheduling and, 102, 109–110, 127
   value of, 2–4
Strategic scheduling. See Scheduling, strategic
Supervisors, 26. See also Casework manager/supervisor
   employee performance problems, management of (See Performance problems, management of employee)
   functional management structure, role in, 33
   managing conflict between, 35–39
   position descriptions, role in setting, 55–56
   regional management structure, role in, 34
   staff evaluation, role in, 45–50
staff inclusion in performance management by, 54
Supporters, outreach beyond, 88
Survey, staff, 80–82
SWOT analysis, 90–93

**T**
Task forces, Member involvement with, 132–133
Teams, interoffice, 78
Technology, use of, 27, 181
Telephone contact with constituents, 159–160, 162
Telephone town hall meetings, 131–132
Television
  - community access channels, Member show on, 134
  - media coverage of events (See Media)
Termination of employee, 48, 75
Themes, scheduling based on, 112
Threats, planning for, 8, 92, 99
Time-sensitive casework requests, 149
Timelines, use of, 69, 96
Timing, scheduling based on, 112
Tour requests, 157, 190
Town hall meetings, in-person/telephone/online, 131–132
Training programs, 39–41, 44
  - for Caseworkers, 173–175
  - Congressional Research Service (CRS), 203
Travel arrangements, 26–27, 115–116, 118, 120
Trust in relationship with staff, 44, 80
Two-year strategic plan, 11

**U**
Urban areas, planning events for, 134
Urgency and importance task matrix, 63–64
U.S. Capitol Police
  - Public Information Office, 139
  - Threat Assessment Section, 139

**V**
Visibility events, 133

**W**
Washington office
  - action plan, responsibilities for, 19
district/state staff exchanges/visits, 79–80, 175
goal integration with district/state office, 5
outreach initiatives, role in, 93
projects staff, 200, 217
staff meetings, inclusion in, 66
tour and flag requests, handling of, 190

*Washington Post, The,* newspaper, 77
*Washington Times, The,* newspaper, 77

Websites
  CMF, 90, 132, 155, 173
  legislative and policy resources, 77
  Member, 181–182
  projects work, resources for, 203

Webster, 77
Weekly progress reports, 67–68
Weekly staff meetings, 66–67
White House, tours of, 190
White House Greetings Office, 189

Work management, 64–70. *See also* Interoffice relations
  action plans, 19–21, 65–66
  individual meetings, 68–69
  office performance, measurement of, 70
  progress reports, 67–68
  staff meetings, 66–68
  timelines, 69
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About the Congressional Management Foundation

Founded in 1977, the Congressional Management Foundation (CMF) is a nonpartisan nonprofit dedicated to helping Congress and its Members meet the evolving needs and expectations of an engaged and informed citizenry. Our work focuses on improving congressional operations and enhancing citizen engagement through research, publications, training, and management services.

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