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SETTING COURSE, now in its 16th edition for the 116th Congress, is a comprehensive guide to managing a congressional office. Part I is for Members-elect and freshman offices, focusing on the tasks that are most critical to a successful transition to Congress and setting up a new office. Part II focuses on defining the Member’s role — in the office and in Congress. Part III provides guidance to both freshman and veteran Members and staff on managing office operations. Setting Course is the signature publication of the Congressional Management Foundation and has been funded by grants from:

Deborah Szekely

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Preface

While running for Congress in 1982, Deborah Szekely learned that no manual existed to help new Members of Congress set up their offices. Although she lost the election, in commissioning this book, she discovered a valuable way to serve the Congress. Without her enthusiasm and foresight, Setting Course simply would not exist. In the first edition in 1984, we predicted that Members of Congress would be in Deborah’s debt for years to come. Thirty-four years later, that prediction has come true. Many people have good ideas, but few have the ability to implement them. Fortunately, Deborah excels in transforming her ideas into projects, and her projects into successes. CMF remains indebted to Deborah for conceiving and funding the original edition of Setting Course and for her continued commitment to this book.

This edition of Setting Course follows Deborah’s vision of providing timely, proven guidance on the fundamentals of setting up and managing a congressional office. It offers ideas, models, and advice to guide Members of Congress — whether in their first, fourth, or tenth term. It combines the wisdom of previous editions with new insights and updated information for the 116th Congress.

CMF’s mission is “building trust and effectiveness in Congress.” Though it may seem idealistic to some, our experience has proven that greater effectiveness is both realistic and achievable. We believe that if Members of Congress implement the management and planning advice in this book, they can increase their own productivity and efficiency, thereby improving the effectiveness of Congress as an institution.

We are honored that Deborah Szekely and our longtime partner, the Society for Human Resource Management, support this mission and enable us to continue providing the critical guidance contained in Setting Course through their generous financial contributions. Without their support, this 16th edition would not have been possible.

As the world’s largest professional association devoted to human resource management, the Society for Human Resource Management (SHRM) is dedicated to promoting effective management and leadership all over the globe. We are proud to partner with them to offer management advice and techniques to individual House and Senate offices through Setting Course, our Life in Congress research project, and a variety of professional development programs. SHRM also was the exclusive sponsor for Keeping It Local: A Guide for Managing Congressional District and State Offices.
CMF is fortunate to produce Setting Course with such forward thinking supporters of the Congress who understand the powerful link between effective management and professional success — whether the goal is building a thriving business and meeting customer needs or formulating forward-looking public policy to address constituent concerns more effectively.

Thank you.

Bradford Fitch  
*President & CEO*  
*Congressional Management Foundation*
Acknowledgments

The Congressional Management Foundation (CMF) is indebted to many people for their help in producing Setting Course. We warmly thank all who contributed to its success.

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Ira Chaleff, President, Executive Coaching and Consulting; CMF Management Consultant; former CMF Executive Director and chair emeritus
Revising a publication of this scope and magnitude is a significant undertaking and could not have been completed without the support and hard work of CMF staff and research assistants. For their timely assistance with the revision, production, and distribution of this edition, I thank Brad Fitch, Susie Gorden, Sarah Thomson, Bradley Joseph Sinkaus, and Meredith Goff.

We must also acknowledge our predecessors. The first three editions of Setting Course were the joint product of The American University’s Center for Congressional and Presidential Studies (CCPS) and CMF. We are proud to follow in the footsteps of the outstanding staff who collaborated on these editions: Burdett A. Loomis, Paul Light, James A. Thurber, Gary Serota, and Ira Chaleff.

CMF has worked diligently on Setting Course to keep the guidance accurate and relevant. However, we care deeply about improving our products and welcome all feedback, corrections, or suggestions for the next edition.

Nicole Folk Cooper
Director of Research and Publications
Congressional Management Foundation
Editor, Setting Course (16th Edition for the 116th Congress)
Introduction

In the classic 1972 film, *The Candidate*, Robert Redford portrays an idealistic young man running for the Senate against an entrenched incumbent. The final weeks of the campaign are a frantic whirl of events, and no one — not the candidate, nor the campaign team — has time for a single thought beyond election day. Redford wins, of course — this is the movies — but on the way to deliver his victory speech in the famous final scene, he pulls his campaign manager aside and asks in a daze, “What do we do now?” And credits roll.

Where *The Candidate* ends, *Setting Course* begins.

Successful careers in Congress don’t just happen; they are the result of careful planning and management. We believe that good management and planning techniques can be applied to congressional offices. More specifically, well-managed offices are more likely to achieve their political and legislative objectives. We also believe that improving the performance of individual offices enhances the overall effectiveness of the Congress and strengthens the public trust.

The need to apply management principles to a congressional office is especially true for freshmen, given the extraordinary challenges they face. Members-elect have two months from election day until swearing-in day before they are expected to be up and running — an insufficient time to finish the massive array of tasks they must complete to become a fully functioning House or Senate office. To employ the nautical metaphor of this book, coping with this shortage of time leaves freshman Members with the daunting initial challenge of trying to sail their boats in the ocean at the same time that they are building them. It is a demanding and dangerous task that requires significant management skills and courage to succeed.

Effectively setting and implementing priorities is also a discipline veteran offices must continually practice if they are to avoid the common congressional hazard of working very hard but accomplishing very little. This book is intended to help freshman and veteran Members better serve their constituents and better serve their country. It is based on four decades of CMF research into the best practices used by House and Senate personal offices.

We’ve divided *Setting Course* into three distinct sections to meet the needs of our different audiences. New Members and their key transition staff can use Part I to better understand the critical transition decisions they face in November and December and to receive guidance for making these decisions. Part II is designed to help freshman and veteran Members understand the culture of Congress, choose a path to success within the
institution, and become effective leaders of their offices. Part III provides guidance to freshman and veteran Members and their staff on managing many of the critical functions of a congressional office: planning, budgeting, managing staff, constituent communications, scheduling, and ethics.

This book has changed markedly in content and structure since the first edition in 1984, but the core guidance and wisdom of this book have remained relatively unchanged. Thirty-four years ago, Setting Course was an interesting experiment addressing the untested question: Would Members of Congress and staff read and apply sound management guidance from a written manual? Today, this book has become required reading for Members-elect and a valuable desktop reference for virtually every Chief of Staff and many veteran Members. We hope it is as helpful to you in setting your course for your career in Congress. Enjoy the journey.
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Transitioning to Congress and Setting Up Your Office

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Notes a series of questions. Your unique answers can help you make decisions about managing an office and a career.

Alerts you to a situation which Hill offices have found to be problematic. Proceed with caution and pay close attention.

Notes a concept or recommendation that CMF has determined, through its research with congressional offices, to be helpful.

Identifies an office or organization which you may wish to contact for further information on the topic.

Notes a process or steps you can use in the operations of your office.
CHAPTER ONE

Navigating the First 60 Days: November and December

This Chapter Includes...

✩ A process for setting priorities during the transition
✩ Those key activities which should be your focus in November and December
✩ Guiding principles to help you make more informed decisions and maintain your focus during the transition

Not long ago, freshman Members of Congress could use most of the two months between Election Day and swearing-in day for a well-deserved vacation. Times have changed. Increasingly, what you do and don’t do during the transition may well govern the success of your first term, if not your career.

You probably can (and should) find a few days to relax with friends and family. But only a few. Freshmen who get a late start tend to make rushed, uninformed decisions about their office operations and are often unable to rebound and demonstrate accomplishments in their first terms.

It is equally important to recognize that you cannot do everything during the transition, nor should you. You simply don’t have the time, resources or information. Rather, you should identify and concentrate on the essential tasks which will set the stage for a successful first term. Other, non-critical decisions should be deferred.

Part I of this book is designed to help you make these decisions and navigate your transition to Congress.
Chapter Summary

The DO's and DON'Ts of

Navigating the First 60 Days: November and December

Do...

• concentrate most of your energy on three critical activities:
  – making decisions about your living and other household arrangements;
  – selecting and lobbying for committee assignments; and
  – setting up your office.

• use your strategic goals to shape critical early decisions, such as:
  – creating a first-year budget;
  – establishing/selecting a management structure;
  – hiring a core staff;
  – evaluating your technology needs; and
  – establishing a district or state office(s).

• learn to delegate. A Member should focus on those tasks which only he or she can perform, and delegate the rest to staff.

Don’t...

• try to do everything. Set priorities so you can do essential tasks well, rather than an overwhelming number of tasks only adequately.

• put off strategic planning until later in the year. If you do, you might make decisions that cannot be easily reversed.

• skip the House/Senate orientations and party organizational meetings. They provide invaluable opportunities for networking and learning the intricacies of Capitol Hill.
CHAPTER TWO

Selecting Committee Assignments

This Chapter Includes...

✩ The importance of committee assignments to freshmen
✩ How the committee assignment process works
✩ How to choose and lobby for committee assignments

Perhaps the most important event for a freshman that occurs between the election and the first day of the new Congress is the allocation of committee assignments. These assignments often determine the character of a Member’s first term, if not his or her career. Indeed, they are often the key to successful congressional careers and successful policymaking. For this reason, the effort to obtain the best possible committee assignment often begins the day after the election. Your timing is critical because the process intensifies during the early organizational meetings your first week in Washington, and decisions are almost always finalized by the parties before opening day.

This chapter describes how the committee assignment process works and offers advice on how best to secure an assignment.
Chapter Summary
The DO’s and DON’Ts of Selecting Committee Assignments

**Do...**

- recognize the importance that committee assignments play in the success of your first term.
- become well-acquainted with the formal rules and processes that govern the assignment of committee seats. Pay particular attention to your party’s committee on committees. Pursue committee assignments that can advance your goals and which reflect your priorities.
- start early. Gather information on the seats available and your chances of getting them. Make your selections, and make your case to your colleagues as to why you should be granted a particular assignment.

**Don’t...**

- be discouraged if you do not get your first choice for committee assignment. The appointment of freshman Members to the most prestigious committees is rare. It is common for Members to try to switch panels after two or four years.
CHAPTER THREE

Creating a First-Year Budget

This Chapter Includes...

✩ An introduction to the rules of House and Senate budgeting
✩ The Member’s role in budgeting
✩ A four-step process for developing a first-year budget
✩ Advice from veteran offices in putting together a first-year budget

On the Covey Matrix described in the first chapter, budgeting is a Quadrant II activity. It is an important, but not urgent, task for a new Member of Congress to undertake between the election and January. No one is demanding that your office put together a budget. Without one, however, your goals are little more than a wish list. A budget sketches out how you will allocate resources in a way that will help you reach those goals. Of course, this assumes you’ve set down some goals for your first term. If you haven’t done so yet, we urge you to. For guidance in goal setting, see Chapter 1, “Navigating the First 60 Days,” and Chapter 11, “Strategic Planning in Your Office.”

Crafting a budget early, even if it’s only a rough estimate of how you plan to spend your money, has a number of advantages to just winging it as you go along. First, it will help you avoid making fast and loose commitments which you may later regret. Without the big picture in mind, it may be difficult to see that promising $100,000 salaries to three inexperienced campaign workers, or telling your constituents that you’ll visit every town in the district or state in the first year, might not be the best use of your limited resources. Second, it will give you confidence that large commitments of money you do make will fit into a larger spending plan. Hiring staff, buying computers and signing district/state office leases may use a good portion of your budget, and decisions once made are not easily undone.

Early budgeting also lets you know if your goals are feasible. If you’ve promised to turn back some of your allocation, or to stay in close touch with constituents through newsletters and surveys, you will get an idea of whether you can afford to do so. Moreover, you will have a good basis on which to decide if the costs are reasonable and justified by the anticipated benefits.
**Do...**

- **spend the time to write a first-year budget** before making decisions on management structure, core staff, district/state offices, and technology.

- **learn the rules and regulations for House and Senate allowances, and when in doubt, ask for help.** Develop good working relationships with staff from the House Finance Office or Senate Disbursing Office who know the tricks of the trade.

- **determine the Member’s involvement in financial management, and how responsibilities and authority will be delegated to staff on the financial team.**

- **create a first-year budget by:**
  1. collecting expense information;
  2. making major allocations;
  3. comparing major allocations to your office goals;
  4. building a month-by-month budget.

- **have a plan for spending leftover funds.** Consider your goals for the next year so you aren’t scrambling to spend funds at the end of the year.

---

**Don’t...**

- **make commitments that might have financial repercussions** for staff or constituents without first devising a rough budget.

- **forget to set aside reserve funds — particularly in your first year — to handle unforeseen expenses.**

- **overspend the office budget.** If the office goes over budget, the Member must personally pay the difference.

- **forget that as an elected official, your expenditures are public information and are easily found online.** Spend taxpayer money appropriately and responsibly.
CHAPTER FOUR

Creating a Management Structure and a System for Communicating with the Member

This Chapter Includes...

✩ The most common management structures used in personal offices
✩ The advantages and disadvantages of each management model
✩ Guidance for designing a system for Member-staff communications

For a freshman office to operate effectively, staff and the Member must have a clear, shared understanding of how the office operates. How will decisions be made in this office? Who has decision-making authority and over what issues? Who supervises whom? How should staff communicate with the Member and the Member communicate with the staff?

Many freshman offices are inclined to let the answers to these questions evolve over the first term with little direction. Over time, the thinking goes, the Member’s operating style emerges and the office can then cobble together a management structure and communication system that reflects these preferences. CMF believes this is a mistake for several reasons.

First, lack of clarity early on will create staff confusion and encourage freelancing, which in turn will impair office productivity and blur lines of accountability. Staff should not be left to figure out on their own “how the place works” and how they should operate. Second, basing an office’s management structure and communications practices solely on the Member’s preferences will likely not result in a productive work environment. Many Members will choose practices that are familiar and comfortable to them but
Creating a Management Structure and a System for Communicating with the Member

**Do...**

- address basic questions in management structure, such as:
  - what role should the Member play in the management of the office?
  - who will report directly to the Member?
  - who will report directly to the Chief of Staff?
  - who will report to whom (don’t forget about the district/state office staff)?
- create a management structure that reflects the styles and abilities of the Member, Chief of Staff, and District/State Director and takes into account the office’s mission, goals and personnel.
- design a system of Member-staff communications that employs a range of methods.
- conduct regular office-wide discussions to fine tune the communication system.
- create a monitoring system or establish a checklist to track all requests requiring the Member’s attention.

**Don’t...**

- let the office management structure and methods of communicating “just evolve” between staff and Member over your first term.
- base an office management structure solely on the Member’s preferences. Many Members will choose procedures comfortable to them, which may not necessarily be good management practices.
- cut off access to the Member completely, but preserve the Member’s time for high-value activities. As the most valuable resource in the office, the Member’s time should be spent wisely.
- neglect to include in your communications procedures a system for creative and analytic work. Problem-solving, brainstorming, and strategizing require time.
- ignore the importance of regular, well-run staff meetings. Have a clear purpose and written agenda for each meeting. Establish firm starting and ending times.
- overlook district/state office staff when developing communications and access procedures. They also need conduits for communicating with the Member.
CHAPTER FIVE

Hiring Your Core Staff

This Chapter Includes...

✩ The pressures new Members face to hire staff quickly
✩ The benefits of hiring only a core staff in November and December
✩ The office functions that a core staff need to perform and the number of staffers needed to perform them
✩ The importance of fitting your core staff to the mission and goals of your office
✩ Hiring the rest of your staff
✩ A process for interviewing and hiring candidates

New Members are under enormous pressure to hire a full staff as soon as possible, and they frequently try to assemble that staff in the two months between the election and swearing-in day. The results are often poor hiring choices that do not contribute to the Member’s success, as well as a neglect of other critical tasks which must be accomplished before swearing-in day. The long-term effects can be low staff cohesion and morale, staff talents which do not match office needs and priorities, high staff turnover and wasted resources in hiring and training new staff.

This chapter lays out an alternative approach that we believe will help you assemble an office team capable of achieving your goals. We believe Members-elect should interview and offer jobs in November and December only to a core staff who will be in place on opening day to perform the essential functions of a congressional office. Individuals should be hired who can become part of the larger office team dedicated to achieving your office goals. The remainder of your staff should then be hired when you have finalized your goals and you have the time and resources necessary to hire the right candidates.

Note: For specific legal guidance on interviewing and hiring, contact the Office of the House Employment Counsel (202-225-7075) and the Senate Chief Counsel for Employment (202-224-5424).
## Chapter Summary

### The DO’s and DON’Ts of Hiring Your Core Staff

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<tr>
<th><strong>Do...</strong></th>
<th><strong>Don’t...</strong></th>
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<tr>
<td>• select your <strong>Chief of Staff first</strong>, if possible. A good Chief of Staff is instrumental in setting up your office and must be someone you trust to make critical decisions during the transition.</td>
<td>• only review the <strong>stack of incoming resumes in seeking potential staff</strong>. Find other candidates so you aren’t limited to hiring only those people who have contacted you.</td>
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<td>• <strong>pick a core staff that will be able to perform the essential functions of your office for about six weeks</strong>. January is a slow legislative month, and it’s more important to answer phones and greet visitors than to research legislation.</td>
<td>• choose a full staff <strong>before January</strong>, even though there is enormous pressure to have a lot of staff in order to “hit the ground running.”</td>
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<td>• <strong>hire the remainder of your staff between January and May</strong>, as you become sure of your needs.</td>
<td>• <strong>hire staff without a written job description for each position</strong>. It is essential to clearly identify the principal duties and functions of the job, and helps ensure that the office and the candidate/new hire are in agreement regarding the responsibilities of the position.</td>
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<td>• hire someone you <strong>cannot fire</strong>. For example, don’t hire the child of a prominent politician or another key stakeholder from the district/state unless you’re absolutely certain that you want this employee for the long term.</td>
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CHAPTER SIX
Selecting and Utilizing Technology

This Chapter Includes...

- Guidance for purchasing hardware and software
- Key considerations for making technology decisions
- Steps to purchasing the right hardware and software
- How to keep systems running smoothly

The Internet, intranets, and email have enhanced Congress’ ability to conduct legislative research, provide constituent services, and enhance press operations. Correspondence Management Systems (CMS) in the House and Constituent Services Systems (CSS) in the Senate have enabled offices to integrate all constituent interactions into one, readily accessible database. Mobile devices and remote access to House and Senate networks allow staff to be fully connected, even when they aren’t in the office. Technology has provided congressional offices with new opportunities and new strategies for conducting legislative work, and delivering more effective and efficient constituent services. Constituents, reporters, and interest groups now expect congressional offices to implement new technologies quickly and seamlessly to provide greater access to legislative information and the legislative process.

Balancing constituent expectations and limited resources, however, has become one of the most difficult management issues for offices. Like any business, each congressional office is responsible for making most of its own information technology (IT) decisions, which can feel like a daunting task. Before you can determine the appropriate technology for your office, you will need to have a clear sense of exactly what you’ll want it to do for you. Don’t worry — the House and Senate have extensive assistance available to help ensure a smooth transition for the Member and staff. This chapter will guide you through this process.
Chapter Summary

The DO's and DON'Ts of

Selecting and Utilizing Technology

Do...

- **address critical issues before you make final purchasing decisions.** Consider:
  - the technology required to fulfill office goals;
  - the staff’s level of comfort and skill with technology;
  - whether your district/state has any quirks that could demand unique technological resources;
  - how much of your budget you want to earmark for technology.
- **follow the “six-step process”** when purchasing:
  1. Inventory your current hardware, software, and functionality.
  2. Talk to the institutional experts in the House and Senate who can help.
  3. Shop around.
  4. Try before you buy. Test the equipment in a similar environment.
  5. Be sure your planned purchase is compatible with your existing system.
  6. Pay close attention to the installation and maintenance details. Maintenance contracts, services and costs can vary significantly.
- **establish technology policies and procedures** for data management, district/state office operations, social media use, and constituent communications.

Don’t...

- **get mired in the details** when purchasing hardware and software. What you want to accomplish is more important than how you will accomplish it.
- **plan just for today’s needs.** With the rapidly changing environment and increasing demands from constituents, offices need to be prepared to expand their technological capabilities quickly.
- **treat technology as an afterthought.** Think of it as integral to every function of your office.
- **buy anything without consulting available resources** or other offices that currently use the system. House and Senate staff should consult with their assigned technology/support representatives.
- **neglect training the staff.** Your system will run more smoothly and staff will be more productive after training.
Establishing District and State Offices

This Chapter Includes...

- The importance of decisions concerning district/state offices
- Selecting the number and location of district/state offices
- Determining which office to open first
- Obtaining furniture and equipment for district/state offices

“All politics is local,” according to the late House Speaker Tip O’Neill. And nothing creates more visibility on the home front, especially for a freshman Member, than opening a district or state office. According to most veterans, opening one office on swearing-in day is important. It need not be fully staffed or adequately equipped, but the door should be open. Therefore, preparing to open one office should be a critical task to undertake between the election and the start of the new Congress.

In addition, there are great benefits if you begin now to plan for all of your district/state offices. First, your success as a Member of Congress will depend on ensuring that your combined DC and district/state resources are coordinated in pursuit of your office’s goals. Also, decisions regarding the number, location and objectives of your district/state offices will influence other key management decisions, such as budgeting, management structure, staffing, and technology purchases. Finally, many decisions regarding district/state offices are difficult to reverse (or at least not without political or financial penalties).

This chapter will help you through the process of planning your district/state offices and opening one by the start of the new Congress.

Note: All leases for district/state offices must be reviewed and approved by the Senate Sergeant at Arms’ (SAA) State Office Operations (202-228-STAT) or the Administrative Counsel of the House (House.Leases@mail.house.gov) before signing.
Chapter Summary

The DO’s and DON’Ts of

Establishing District and State Offices

Do...

- understand that setting up a district/state office is a difficult decision to reverse. Give it your full attention because closing an office in your first term can have political repercussions.

- weigh the advantages and disadvantages of using government vs. privately-owned space for your district/state offices. Consider location, accessibility, cost, square footage, and other factors when making your decisions.

- think creatively about how to best serve constituent needs. Part-time offices and mobile offices are alternatives to the traditional district/state office, and holding regular community and open office hours allows the Member to reach remote areas and constituents who might be unable to travel.

- make sure the first district/state office you open is adequately prepared. While it doesn’t need to be fully staffed or equipped, the office will need to handle an immediate onslaught of meetings, scheduling requests and questions about ongoing casework.

Don’t...

- automatically decide to occupy your predecessor’s office(s). Consider how your needs and goals might necessitate a different city or a different space.

- open more district/state offices than you need. Use the following criteria to determine the number to open:
  – size of district/state;
  – accessibility to constituents;
  – constituent expectations;
  – competing budget priorities;
  – urban/rural differences;
  – strategic importance of constituent services; and
  – staff hiring limitations.

- make any long-term commitments without first seeking guidance and assistance from the Senate Sergeant at Arms’ State Office Operations or the Committee on House Administration.

- overlook the role of technology in increasing district/state effectiveness and efficiency.
Part II: Defining Your Role in Congress and Your Office

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Chapter Ten: The Member’s Role as Leader of the Office .................................................. 139
CHAPTER EIGHT

Understanding the Culture of Congress: An Insider’s Guide

This Chapter Includes...

✩ Constants in Congress

✩ Three trends that have influenced recent Congresses:
  close party ratios, large influx of new Members and increased partisanship

Like all organizations, Congress has a culture — a context in which Members operate. This culture extends beyond formal rules and regulations to encompass the unwritten and often unstated norms, values, tensions, practices and taboos of the institution.

Culture can greatly influence a Member’s official decisions by determining the scope of the choices a Member has available and how a Member defines success. Possessing insight ahead of time can help Members — especially new Members — maneuver and make choices without having to learn lessons the “hard way.” This chapter is an overview of some of the trends we’ve observed.
Do...

- **be entrepreneurial.** Getting what you want from Congress requires individual effort and savvy. Courting leadership is not enough.
- **expect partisanship and a lack of civility.** When control of the House and Senate are tenuously held by a political party, and Members are not interested in establishing careers in the institution, partisanship reigns.

Don’t...

- **expect quick action on issues.** Policymaking can be slow, partisan and frustrating.
- **think that a congressional schedule is written in stone.** There are often last minute changes that can result in late nights and hectic Member schedules.
Defining Your Role in Congress

This Chapter Includes...

- The importance of defining your role in Congress
- The five major roles available to Members
- Balancing major and minor roles
- Guidance for selecting your role

Many freshman and veteran Members of Congress make the mistake of assuming that their jobs and roles are largely prescribed by the Constitution and political tradition. For much of American history that conclusion may have proven true. However, as the previous chapter explains, over the last several decades, Congress has evolved into an institution of entrepreneurs who are expected to chart their own course once elected. In this regard, the most important step for a freshman or veteran Member is to define the role you want to play in Congress.

Successful Members recognize early in their tenure in Congress that there are many diverging paths to power and figure out which path they should take. Members who do not understand that they cannot do it all, that they cannot pursue all the paths, tend to fail and grow frustrated with their jobs.

Consequently, the goal of this chapter is to help you define what role you choose to play and help you prosper in this entrepreneurial culture.

Job Description for a Member of Congress

CMF created a job description for U.S. Senators and Representatives, much like those that exist for staff positions. We grouped Members’ current duties into seven main functions and vetted our findings with former Members of Congress, and current and former congressional staffers. We encourage Members and staff to review this resource (available at CongressFoundation.org) in addition to this chapter.
Chapter Summary

The DO’s and DON’Ts of

Defining Your Role in Congress

Do...

- **figure out the right role for you in Congress by analyzing and balancing:**
  1. your personal strengths and weaknesses
  2. your mission in Congress
  3. the needs of your district/state
  4. your political circumstances

- **define your role as one of the following:**
  1. Legislative Insider
  2. Party Insider
  3. Ombudsman
  4. Statesman
  5. Outsider

- **determine if you want to “major” in one role and “minor” in another.**
  Balancing two compatible roles can lead to increased effectiveness and power.

Don’t...

- **operate opportunistically without the benefit of defining your role.**
  Members adopting too large a range of issues can work very hard but accomplish little.
CHAPTER TEN

The Member’s Role as Leader of the Office

This Chapter Includes...

- The Member’s role as leader of the office
- How to create a positive office culture
- How to assess and improve your leadership style
- How to address common leadership problems

Most freshman Members of Congress come to their new jobs with minimal management experience. The majority of recently elected Members, for example, served previously as public officials and lawyers. While they handled significant responsibilities in these jobs, they were not responsible for leading and overseeing an entire organization. Even those who’ve had previous management experience quickly learn that Congress is a unique institution with its own culture and unique organizational demands.

New Members tend to come to their new jobs believing that the necessary ingredients for success in Congress are the personal talents responsible for their past successes: political savvy, good conceptual skills, excellent interpersonal skills, an abnormally strong work ethic, a drive to succeed, and perseverance. Most come to realize, however, that success in Congress requires a strong office operation as much as personal abilities. Consequently, it is critical that Members learn to become effective leaders of their offices. The advice in this chapter is based upon years of experience during which CMF has analyzed dozens of House and Senate personal offices, interviewed hundreds of personal office staff, and worked with dozens of Members and Chiefs of Staff in improving the effectiveness of their offices.
Chapter Summary
The DO’s and DON’Ts of
The Member’s Role as Leader of the Office

Do...

- **understand that you are the leader** — not the day-to-day manager — of your office.
- **assess and understand your leadership style.** Request honest feedback to help you analyze your leadership strengths and weaknesses.
- **hire a Chief of Staff whom you can trust** to manage the office with broad guidance you provide. If you lack confidence in your Chief of Staff, you will feel compelled to micromanage the office.
- **take the time to assess the capabilities of your staff** so you can feel confident in delegating work. This will allow you to focus the leadership responsibilities of the office.
- **create a positive office culture by:** having a clear mission and goals; operating according to personal values that will result in staff respect; and treating staff with trust and respect.

Don’t...

- **create a negative culture by:** failing to adhere to clear, consistent values; promoting the mistrust of others; making staff feel that they are expendable.
- **deny that every office has resource limitations.** Members who constantly generate new initiatives and projects without making strategic trade-offs in priorities overburden themselves and their staff and accomplish little for their efforts.
- **neglect the Member/Chief of Staff relationship.** To work well, this relationship requires a good deal of discussion and negotiation about roles and expectations.
Part III: Managing Your Congressional Office

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CHAPTER ELEVEN

Strategic Planning in Your Office

This Chapter Includes...

✩ The value of planning
✩ The steps of the planning process
✩ Tips for conducting a planning session

Planning should be no stranger to you. To win your congressional campaign, you developed and executed a clear plan that reflected your personal strengths and interests, the concerns of your constituents, the political climate, and the resources available to you. In CMF’s research and consulting work, we have found that the most successful Members are those who succeed in transferring good election planning skills to their congressional offices.

This chapter will help you develop a strategic plan for your office and enjoy the political and managerial benefits that accompany good planning.
Chapter Summary
The DO's and DON'Ts of
Strategic Planning in Your Office

Do...

• engage in strategic planning — especially if you’re a freshman — to set goals and priorities for the Member and staff, allocate resources and enable your office to be more proactive and effective.

• 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.

• balance four perspectives in your planning: the Member’s personal goals and interests; constituent needs; office strengths and weakness; and opportunities and threats.

• develop a system for evaluating potential goals that considers the overall office mission, the resources needed to pursue the goal, and the likelihood of its success.

• monitor progress on goals through written 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.

• measure office performance at the end of the year. Create a process and a checklist of questions. Where did we succeed, where did we fail, and why?

Don’t...

• 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 or establishes too many themes. The more focused it is, the more direction it provides to staff.

• hold major planning meetings in the office or make them too formal. Go offsite to encourage enthusiasm, creativity and original thinking.

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

• undertake a major project without first drafting a comprehensive action plan. Deadlines and clearly defined responsibilities are essential to keeping everyone accountable and focused on the plan.

• pursue a new initiative without scrutinizing how it would affect the strategic plan, goals and office resources. This discipline is required to help prevent new ideas from constantly crowding out previously agreed-upon goals.
CHAPTER TWELVE

Budgeting and Financial Management

This Chapter Includes...

✩ The strategic importance of budgeting
✩ A process for budgeting toward your goals, year after year
✩ Suggestions for establishing office accounting procedures
✩ Cost-saving and budgeting tips recommended by veteran offices

A congressional office, like a small business, requires two things in order to operate: (1) a mission or purpose (a reason for existing), and (2) resources to support that mission. In Congress, you are largely responsible for developing your mission — your reason for coming to Washington, DC — and for deciding what you want to accomplish and contribute while here. Your resources, on the other hand, are given to you by Congress and paid for by the American taxpayer.

This chapter is designed to help each congressional office use its budget as a strategic tool to achieve its office goals. The message is simple: if spent wisely, your resources can greatly boost your chances of success and achievement in Congress; if spent foolishly, it can lead to ineffectiveness and even public embarrassment.

This chapter should be read by freshman offices looking ahead to their second year and veterans who wish to ensure their budgeting is in sync with their priorities. (Freshman offices should also read Chapter 3, which contains an introduction to House and Senate budgeting rules, a discussion of the Member’s role in budgeting, and guidance for creating a first-year budget.)
Do...

- use your strategic plan as a blueprint for making budget choices. Make financial decisions and allocate resources with your strategic goals in mind.

- follow the seven-step approach to updating your budget:
  1. note any changes to your strategic plan.
  2. brainstorm to identify what resources it will take to accomplish priorities.
  3. analyze how you actually spent last year’s budget.
  4. note any rule changes affecting the budget.
  5. identify expenses that are flexible or long-term commitments.
  6. review and justify major allocations in your current budget.
  7. create a new month-by-month budget.

- make sure you understand the rules and regulations of your chamber.
  Review the requisite materials and contact the appropriate institutional staff when setting up your financial procedures and prior to making any purchases or commitments.

Don’t...

- succumb to common budgeting pitfalls by: spending on non-priorities; overspending; spending taxpayer’s money in a way that invites media scrutiny.

- overlook the importance of developing an accounting system to track what you actually spend. The House and Senate offer classes to help staff develop this system.

- fail to write down established budget policies and procedures.
  Your office policy manual should address spending authority, reimbursements, out-of-pocket expenditures and record keeping.
A Process for Managing Staff

This Chapter Includes...

- Why a performance management system makes sense for congressional offices
- Five steps towards an effective performance management system
- Handling staff with different needs
- Evaluating your system

Of all the skills required for running a congressional office, managing staff has proven to be the biggest challenge for most. When staff are not well-managed, this leads to inefficient operations, missed opportunities, added stress, and debilitating rates of employee turnover. At its worst, poor staff management could lead to a lawsuit under the Congressional Accountability Act.

One Chief of Staff claims that he can spend five minutes in a congressional office and be able to determine how many terms the Member has served by the order within the office and the confidence with which the staff goes about their business. He listens for the sustained hum of a staff focused on action, in contrast to the intermittent sirens of a staff rushing to the latest emergency.

Naturally, it takes time for a freshman office to smooth out its operation, put policies in place, and let the staff grow their “sea legs.” But some offices continue to operate like a freshman office year after year, taking a toll on both Member and staff. The reason frequently lies in a lack of a system or process for managing staff. Unfortunately, the blame often lies with the Member and/or Chief of Staff who confuses frenzied activity with accomplishment, and who views high turnover as an acceptable cost of doing business.

This chapter will lay out a coherent process for managing all the staff in your office. If you follow this process, you will find that, in short order, staff productivity and morale will improve, as will the overall effectiveness of your office.
Chapter Summary
The DO’s and DON’Ts of
A Process for Managing Staff

Do...

• reap the benefits of improved staff performance and work product by following the five-step performance management system:
  1. establish performance goals for each staff person.
  2. monitor progress and provide feedback on staff performance throughout the year.
  3. conduct formal staff evaluations.
  4. follow through on the evaluations and prepare for the upcoming year.
  5. recognize high-performing staff.

• develop a core message for each employee. Addressing too many issues in the performance review will dilute your key points and reduce understanding of the most important goals.

• adapt the performance management tools to develop staff at different levels. Such a strategy keeps star performers motivated, helps solid performers improve, and addresses the problems of sub-par performers.

• use a consistent and straightforward process to manage an employee’s performance problem. Focus on ways to objectively identify issues and help the employee improve.

Don’t...

• wait until an employee’s performance deteriorates to address the problem. Set expectations early in his or her tenure.

• assess the employee’s performance without first gaining his or her input. Use job appraisal or performance review forms to allow the employee to create an initial self-evaluation.

• use the formal performance evaluation as opportunity to indict staff. Strive for understanding instead.

• discuss money in performance reviews. The purpose is to reflect on past performance and identify areas for future improvement, not make the case for a bonus or salary increase.

• overlook the value of non-monetary rewards for high-performing staff, which also serve as a motivator and morale booster.

• devote the most management time to the weakest employee while ignoring the solid and star performers.
CHAPTER FOURTEEN

Managing Constituent Communications

This Chapter Includes...

- The growth of constituent communications, particularly email
- Determining the priority of constituent mail and outreach mail
- How to establish constituent mail policies
- CMF Mail System, which incorporates the best practices of other Hill offices
- Strategies to address common mail issues and improve the processing of email

One of the omnipresent facts of congressional life is hearing from constituents by letter, telephone, email, and social media. For many Americans, writing to Congress is as essential to democracy as voting. It is a way of expressing their ideas of what their government should be doing — and a Member of Congress would do well to pay attention, no matter what other demands are placed on your time.

For two decades, CMF has been working to improve communications between citizens and Members of Congress. While the Internet has made it easier to contact Congress, technological developments have been so rapid that neither the senders nor the receivers have learned to use these tools in ways that facilitate truly effective communications. Through CMF’s Partnership for a More Perfect Union, the Communicating with Congress and Congress 3.0 Projects, and management engagements with individual House and Senate offices, we have identified best practices to help you manage constituent communications effectively and efficiently so you can then focus on the many other duties of a congressional office.

Note: This chapter uses the terms “email” and “postal mail” to distinguish between electronic and paper communications. It uses the terms “mail,” “correspondence,” or “communications” to refer to both types.
Managing Constituent Communications

**Do...**

- **be proactive to reduce the volume of incoming constituent mail.** Keep constituents informed through a comprehensive and user-friendly website and regular email and social media updates.

- **assess the priority of mail in your office.** It is counterproductive to assign mail a high priority and then fail to devote the resources to answer it appropriately.

- **adopt the CMF Mail System,** which enables an office to answer 85% of mail with pre-approved form letters in about one week.

- **recognize that timeliness is of the utmost importance to constituents.** A prompt one-page response is more desirable than a longer, more detailed response received several weeks later.

- **treat mail backlogs as an office problem, not an individual staffer’s problem.** It is the Member’s reputation at stake, not the staff’s.

- **adhere to a consistent and timely process for the logging and coding of constituent interactions.** Such a scheme will enable you to better track and respond to the needs of constituents.

- **respond via email.** More and more offices are replying to any constituent message (regardless of incoming method) with email if they have an email address on file.

**Don’t...**

- **ignore the expectations of constituents.** Email has made people expect a faster reply and shorter responses.

- **discount the concerns of emailers.** Most of them are just as committed to their issues as traditional postal writers.

- **view mail as simply something to react to.** If you do, you will become a content provider instead of legislating, conducting outreach and district/state projects, and meeting the larger needs of constituents.

- **fail to establish clear mail policies.** Consider: the purpose of responding; the quality of replies; desired turnaround; which mail to answer; Member involvement; the involvement of communications staff; and standard formats.

- **allow the Member to slow the mail approval process.** When the Member regularly functions as a mail logjam, they must rethink the priority of speedy mail turnaround, or come up with a strategy to approve mail more quickly.

- **violate House and Senate rules governing mass communications and email** — both solicited and unsolicited — which can result in Ethics Committee investigations, financial penalties, and harmful press coverage.
A Member’s time will face almost limitless demands. The grueling campaign schedule can quickly become a distant, vaguely pleasurable memory when compared to a schedule in office. The campaign schedule, while inhumane in the extreme, had two benefits probably not appreciated at the time. It was compressed into a relatively short, endurable timeframe, and the candidate had a great deal of control over what was done and when it was done. By contrast, unless a Member loses or retires, there is now no end in sight. And he has lost control over a large portion of his time: up to 70 percent of the time will now be determined by others. As a result, a Member might find that his schedule controls him, when he wants to be in control of his schedule.

It is possible to avoid this unhappy state of affairs. One can rise above the day-to-day minutiae commonly included in the term “scheduling” by instead practicing strategic scheduling. This means creating a focused framework for the scheduling process that reflects an office’s strategic plan. This will ensure that strategic goals drive the schedule. A strategic scheduling process will preserve your office’s sanity, which is especially needed by freshmen in the tough first term.

There will always be challenges in scheduling. But the office can reduce these challenges if a Member commits to a strategic scheduling method early in the term and sets up a process and framework to support it. And while it is easier to adopt a strategic scheduling framework when the Member has a clean slate, it is certainly possible for veteran offices to modify their scheduling practices if they wish to do so.
Chapter Summary

The DO's and DON'Ts of Strategic Scheduling

Do...

• follow the six steps for developing and implementing a strategic schedule:
  1. define office goals.
  2. evaluate the impact of office goals on scheduling.
  3. communicate goals to staff.
  4. assemble the scheduling team.
  5. develop scheduling criteria.
  6. conduct a strategic review.

• determine roles and responsibilities for the Scheduler(s) and any other staff who are part of the scheduling team.

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

• serve more constituents by conducting a variety of proactive events in the district/state, such as: individual appointments; community or open office hours; site visits; online, in-person, or telephone town hall meetings; advisory boards; and field hearings.

• consider the Member's travel schedule, the distance from DC to the district/state, and any additional job duties, before hiring and deciding where to locate the person responsible for district/state scheduling.

Don’t...

• hire an experienced, top-notch scheduler if the Member is still going to see every invitation and decide all details.

• rely on reactive scheduling, where the office simply responds to invitations or requests. Instead, actively seek and creative opportunities to achieve goals.

• neglect to get feedback from event attendees. Only by knowing what went right and wrong can the office improve future scheduling trips.

• overschedule. Schedulers must learn to say “no” diplomatically and take the heat because of it.

• ignores the Member’s needs for “down time” or reading time. While Member’s schedules are necessarily busy, they do not have to always keep pace with a hectic campaign-like schedule.

• wait too long to respond to invitations which angers those who invited you, nor reply too quickly, which might result in last-minute cancellations.

• ignore or avoid conflict between the Member’s family and staff. Build a cooperative relationship by setting up ground rules for the family’s involvement in scheduling and interaction with staff.
This chapter does not discuss the rules of the House or the Senate, or how to interpret them. It is essential that you carefully study those rules, meet with the ethics committee staff to verify your understanding of them, send your staff to mandatory training, and ensure that you and your staff are in compliance. We assume that you behave in an ethical manner, that you will continue to do so, and that you wish to be perceived as behaving ethically.

Instead, we propose that ethics can, and should, be managed, just like any other important aspect of your office. This chapter outlines why you should manage ethics in your office and how to do so.

Note: For specific guidance on the rules of your chamber, contact the House Committee on Ethics (202-225-7103) or the Senate Select Committee on Ethics (202-224-2981).
Do...

• understand that some actions fall into the “gray area” of ethics — the gap between being in technical compliance with the rules and meeting the public’s and media’s expectations for public officials.

• reduce the likelihood of ethical breaches by developing clear written policies on how staff should handle common ethical issues.

• recognize that the Member sets the ethical tone in the office. The way the Member balances competing ethical and political concerns will set an example for the staff’s behavior.

• examine every ethics rule with an eye to understanding its underlying principle. Knowing these basic, fundamental principles will help you navigate situations as they arise.

• be aware of the five areas where you may be at greatest risk of a breach of ethics:
  1. inappropriate behavior.
  2. balancing official duties with campaign and political work.
  3. meals and travel.
  4. handling family members and campaign contributors.
  5. the extent to which you can assist constituents with problems they are having with federal agencies.

Don’t...

• ignore new and higher standards for ethical behavior. If you are guilty of only the “appearance of impropriety,” there can be an outcry from the public and media.

• assume that smart, honest people will always make correct ethical judgments. Most ethical judgments rest on an individual’s ability to weigh competing values.

• forget to check with the ethics committees early and often with any questions. Committee staff can discuss the relevant rules, laws and underlying ethical principles with you on a confidential basis.
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About the Congressional Management Foundation

Founded in 1977, the Congressional Management Foundation (CMF) is a 501(c)(3) nonpartisan nonprofit. CMF’s mission is to build trust and effectiveness in Congress. We do this by enhancing the performance of the institution, legislators and their staffs through research-based education and training, and by strengthening the bridge and understanding between Congress and the People it serves.

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