CONGRESSIONAL MANAGEMENT FOUNDATION

New Member Office Training

The New Member Experience

Setting Up a Congressional Office for Success

Friday, January 15, 12:00 PM – 1:30 PM

No call in number available.

Audio is ONLY available through your computer

This webinar made possible through the generous support of

AARP

Aflac

Alzheimer's Association

American Council of Life Insurers

FMI-the Food Industry Association

General Motors Corporation

International Paper

KnowWho

National Association of Counties

National Rural Letter Carriers' Association

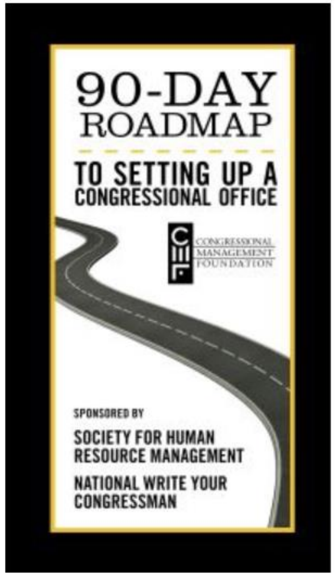
Congressional Operations

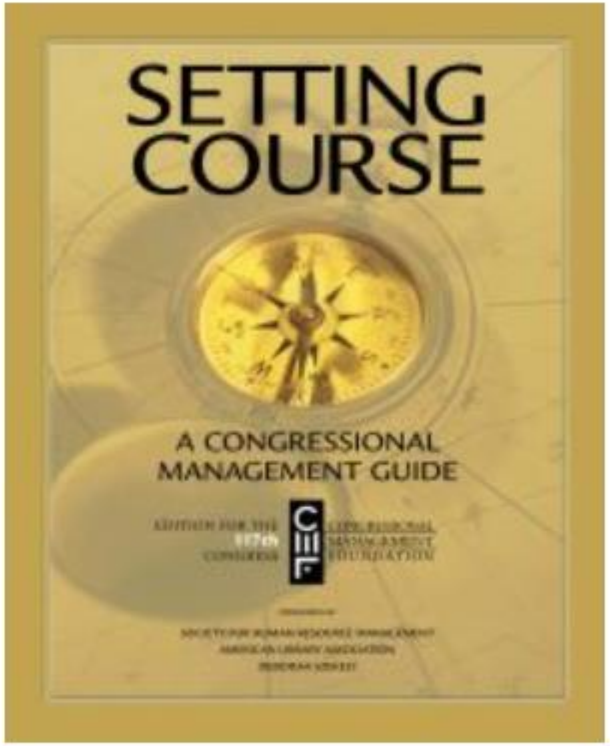
- Training, consulting, research to support a functioning Congress
- 1,000 staff from 300 offices

Citizen Engagement

- Unique studies, trainings, and resources for citizen advocates
- Connected to 90,000 Americans

- New Member Resource Center
  - Google: “CMF New Member Resource Center”
- New Member Training Series
  - December 2020 – June 2021
- Legislative Assistant Training
  - Government Affairs Institute at Georgetown University
- District-Based Guidance
  - *Keeping It Local*
  - Templates/Manuals
- Website Guidance
  - Gold Mouse Awards for Best Website


90-DAY
ROADMAP
TO SETTING UP A
CONGRESSIONAL OFFICE
CONGRESSIONAL
MANAGEMENT
FOUNDATION
SPONSORED BY
SOCIETY FOR HUMAN
RESOURCE MANAGEMENT
NATIONAL WRITE YOUR
CONGRESSMAN


SETTING
COURSE
A CONGRESSIONAL
MANAGEMENT GUIDE

Crisis Preparedness & Response Center

- Managing Issues Related to January 6th Attack
- Managing Congressional Staff Remotely
- WFH Guides
- Best Practices for Online and Tele-Town Halls
- Managing Stress in Constituents and Staff

Timeline for Year 1 for Freshman

- Late January: Get committee assignments
- March: Complete set up of district & state offices
- March: Finalize staff hires
- March: Set up constituent correspondence system
- April: Launch new website
- May: Begin asking the question: *"What was I thinking?"*
- June 30: Filing deadline for FEC report
- July: Senators – move into permanent office

Creating a First-year Budget

- Spend Time to write a first-year budget
  - Should be done before other crucial decisions
  - Gives you a framework of priorities
- Resources
  - Predecessors budget in the Statement of Disbursements
    - Provides an idea on percentages spent in each category
      - Staff, Equipment, Communcations/mail, Rent, Travel
      - Found online at disbursements.house.gov
  - Veteran staff or state delegation guidance
    - Two options – Shared or congressional office staff of Member

Creating a First-year Budget (continued)

- Learn the rules and regulations, avoiding trouble
  - Develop relationships with key staff
    - House Administration
    - House Ethics
    - House Finance Office
- Determine Members involvement in financial management
  - Which responsibilities and authorities delegated
    - Single point of contact for sign-off decisions
    - Setting up office policies to avoid unauthorized expenses
- Build cushion and have plan for leftover funds

Creating a First-year Budget (continued)

- Pitfalls to avoid
  - Don’t make commitments having financial repercussions for staff or constituents without a rough budget
  - Don’t overspend the budget
    - Need a financial person you can trust
    - Members are personally liable for overspending
  - Don’t forget expenditures are public
    - Watchdog groups and local press will scrutinize
    - Easy to access online

Chief of Staff Panel

What choice did you make on financial staff (shared or full-time Member office staff)?

How did you gather information to set priorities?

Any lessons learned from your experience?

Management Structures and Communications Systems

- Basic questions in management structures
  - 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)?

Management Structures and Communications Systems

- Examples of Management Structures Used in Congressional Offices

  Structure #1 - Centralized

  - One person (Chief of Staff) oversees all operations
  - Chief is point of contact for everyone
  - Chief reports to Member
  - Highly common, simple, and straightforward
  - Places heavy burden on one individual

Management Structures and Communications Systems

Structure #2 – Washington-District/State Parity Structure

- Two key staff: DC Chief of Staff and District Director
- Limit staff access like centralized structure
- Cuts burden of work in half
- Allows the two types of specialized offices who have different roles, have leadership that is customized to each office's needs

Management Structures and Communications Systems

Structure #3 – Functional Structure

- Member can have as many as 5 direct reports
  - Chief of Staff, District/State Director, Legislative Director, Communications Director, and Administrative Director/Scheduler/Office Manager
  - Chief of Staff remains overall manager
- Fosters development of management team
- More points of access to the Member
- Chief of Staff must be comfortable working collaboratively

Chief of Staff Panel

- Can you discuss the structure of your respective offices?
- Have you found that structure to work well or did you have to tweak the structure from what you originally intended?
- What do you like and dislike (or would like to improve) about your office's structure?

Management Structures and Communications Systems

Designing a System For Member-Staff Communications

- Areas to address:
  - What’s communicated orally and what’s in writing?
  - Which matters brought to the Member’s attention and which handled by Chief of Staff (CoS) or Legislative Director (LD)?
  - Should the CoS or Scheduler play gatekeeper and screen staff-Member meeting requests, or should your office maximize staff access to the Member?

Management Structures and Communications Systems

Designing a System For Member-Staff Communications (continued)

- Areas to address:
  - Should Member meet individually or in small groups with staff (could affect number of meetings the Member attends)?
  - Who should initiate most meetings — Member or staff?
  - Should the purpose of Member-staff meetings be to convey information, engage in analysis, or both?

Management Structures and Communications Systems

Methods of Communication

- Six primarily used in congressional personal offices:
  1. Open-door or unscheduled meetings initiated by staff;
  2. One-on-one meetings initiated by the Member;
  3. One-on-one appointments scheduled by the staff;
  4. Group meetings;
  5. Written communications (primarily memos, notes and briefing materials); and
  6. Email.

Management Structures and Communications Systems

10 Key Communication Objectives:

1. Essential information deserving of Member attention gets to the Member.
2. Information that doesn’t require the Member’s attention is handled by others.
3. Staff has sufficient access to the Member to effectively represent the Member.
4. Staff convey simple, factual information to the Member quickly and concisely.

Management Structures and Communications Systems

10 Key Communication Objectives (continued):

5. Opportunities exist for creative and analytic thinking (e.g., problem-solving, brainstorming, strategizing — not just exchanging information).
6. Meetings between the Member and staff efficiently utilize the Member’s time.
7. Rapport, trust, and good working relations are built between the Member and the staff.

Management Structures and Communications Systems

10 Key Communication Objectives (continued):

8. Member responds to staff on input and decisions promptly and effectively.
9. Important decisions or information discussed with Member reaches relevant staff when appropriate (e.g., Chief of Staff, Scheduler).
10. Member and Chief of Staff have opportunities to clarify expectations and provide both positive and constructive feedback to staff about their performances.

Chief of Staff Panel

- Can you discuss how Member staff communications are handled in your respective offices?
- Did you ever have to adjust access to the Member because of Member complaints?
- Do your own staff complain to you about access to the Member and if so, how did you handle?

Key Takeaways from Setting Course

- Create management structure reflecting styles and abilities of your key staff and considers 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.

Key Takeaways from Setting Course

- Create monitoring system or checklist to track all requests requiring the Member’s attention.
- Don’t let management structure and methods of communicating “just evolve” between staff and Member.
- Don’t base management structure solely on the Member’s preferences (Member comfort may not equal best practices)

Key Takeaways from Setting Course

- Don’t cut off access to the Member completely, but preserve the Member’s time for high-value activities.
- Include in your communications procedures, a system for creative and analytic work.
- Don’t ignore the importance of regular, well-run staff meetings.
- Don’t overlook district/state office staff when developing communications and access procedures.

Defining Member’s Role in Congress

Figure out the Member’s role in Congress by analyzing and balancing:

- Personal strengths and weaknesses
- Mission in Congress
- Needs of your district/state
- Member’s political circumstances

Don’t operate opportunistically without the benefit of defining your role.

5 Types of Members: Overview

1.) Legislative Insider

2.) Party Insider

3.) Ombudsperson

4.) Statesperson

5.) Outsider

Chief of Staff Panel

- Would you discuss the style of your boss, and understanding that all Members are going to be hybrids of these different categories, is your boss more of one style of Member over another?
- What do you perceive are the advantages and/or disadvantages of your Member’s style and role?

Congressional Calendar Outlook

- Submit Appropriations requests – end of Jan
- Member Policy retreats by party – Feb/Mar
- President submits budget to Congress – First Monday in Feb
- Final decisions on inherited equipment from predecessor – Jun
- Planning August district work period - Jul
- End of fiscal year – Sep 30
- Review of communications blackout calendar – mid-Nov

Upcoming Programs

- 1/29 – Hiring an Effective and Diverse Staff
- 2/12 – Setting Up a Congressional Scheduling Operation
- 2/22 – Setting Up Constituent Communications & Engagement Systems
- March – Creating and Implementing a Legislative Agenda

QUESTIONS?