



BUILDING TRUST &
EFFECTIVENESS IN CONGRESS

**New Member Office
Training**

Setting Up a Congressional Scheduling Operation

Friday, February 12, 12:00 PM – 1:30 PM

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BUILDING TRUST &
EFFECTIVENESS IN CONGRESS

New Member Office Training

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New Member Office Training

Congressional Operations

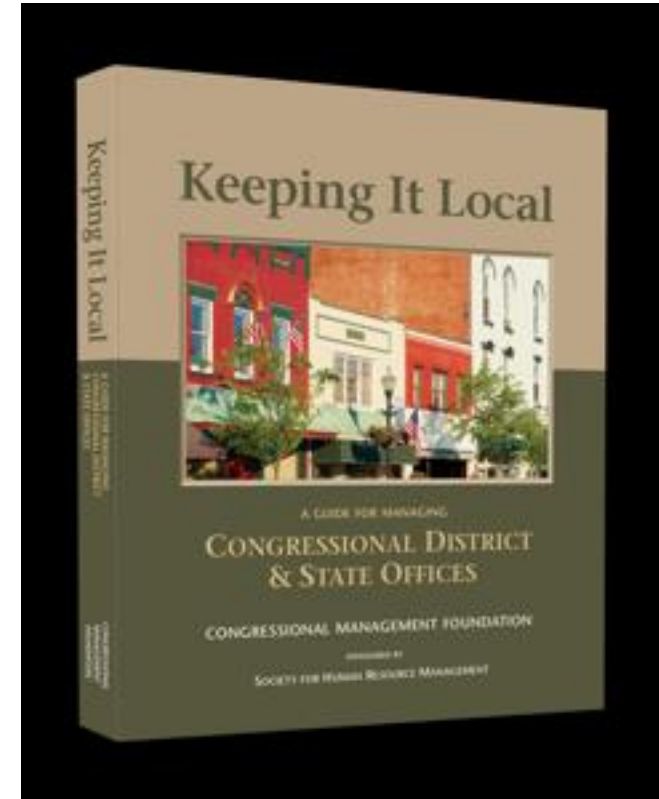
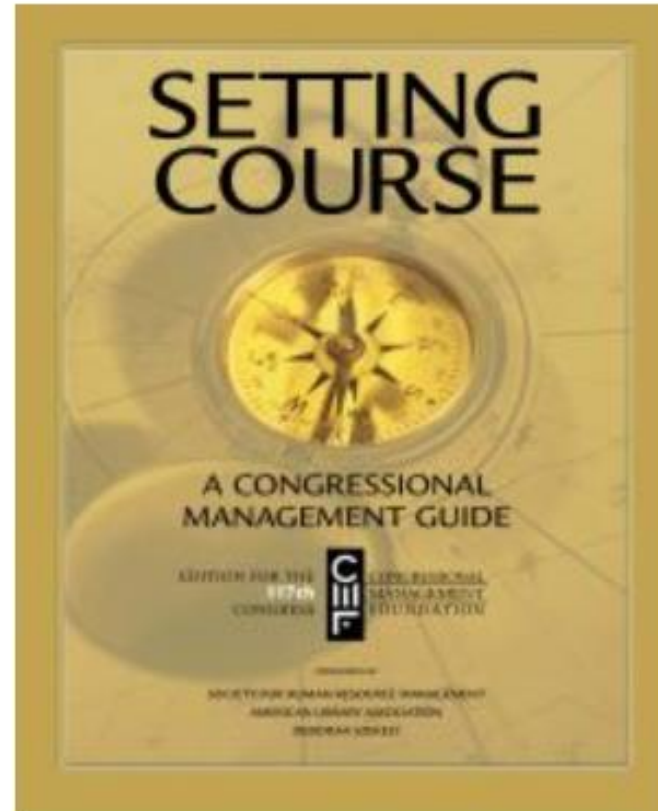
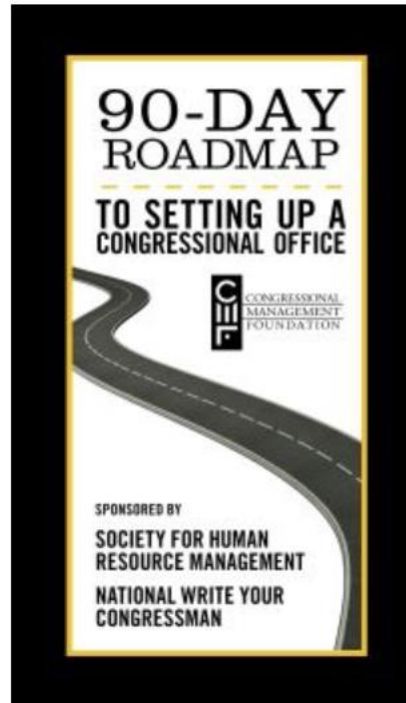
- Training, consulting, research to support a functioning Congress
- 1,000 staff from 300 offices

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/State-Based Guidance
 - *Keeping It Local*
 - Templates/Manuals/Forms
- Website Guidance
 - Gold Mouse Awards for Best Website

CMF Guidebooks for Freshman Offices



CMF's Crisis Preparedness & Response Center

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

Today we will cover:

- Fundamentals of Scheduling
- Sample Operations/Tracking Systems
- House and Senate Schedule Differences
- Working with Members
- Setting Goals and Visions

Today we will cover:

- Crisis Management
- Working with Staff
- Scheduler Mindfulness
- Q & A



One Member's Description of The Scheduler



Fundamentals of Scheduling

How to think about the role of scheduler

Fundamentals of Scheduling

- At the core: **Organizational**
- On the surface: **Executional**
- What it feels like: **Psychological**



Organization/Tracking Systems

Building your own framework

Meeting/Event Request Tracking

- Building an input and tracking system to organize meeting and event requests
- DC/District/Campaign scheduling

Meeting/Event Request Decisions

- Build a system to decide which meetings the Member should take, and which will be pushed to staff
- Understand who needs to be involved in this process
- Walk through this process thoroughly with your member

Building the Schedule

- Build a system for regrets and how to say no
- Build a system for event information compilation
- Calendar holds
- System for staffing out meetings – walk through this with LD and legislative team

Building the Briefing Binder

- Create system for compiling meeting, event, bill, whatever additional information the member wants
- Create templates for meeting and event information – get approval from member
- Working with staff for completed memos
- Member interaction with briefing book

Tech Systems

- Outlook
- Excel
- Common Drive
- Google Drive
- Fireside, Iconstituent, IQ, etc.

Home » Contact

Meeting Request

Complete and submit the form below to request the Member's appearance at a meeting. Due to the Member's schedule, not all requests will be filled.


* marks required fields of data.

Activity Details


Location of Event: *

- Select -


Event Date: *

Year ▾ Month ▾ Day ▾ 

First Date Available: *

Year ▾ Month ▾ Day ▾ 

Last Date Available: *

Year ▾ Month ▾ Day ▾ 

Do you have any Additional Information About your Availability?

Preferred Start Time *

Number of Attendees: *

Gathering Event/Meeting Requests

- Building a request form on official website
- Scheduler-specific email
(memberschedule@mail.house.gov or
scheduler@member.senate.gov)
- Voicemail system

Proactive Scheduling

- Member feedback and priority
- Outreach
 - Proactive vs. Reactive
 - Tightly vs. Loosely scheduled events
 - Switch things up
- Track yearly events, common district groups

Proactive Scheduling

- DC scheduling occurs 1-3 weeks in advance
- District scheduling occurs 2-6 weeks in advance
- Member/Chief/Scheduler should determine a scheduling timeline system that works best for their needs
- Are there lingering expectations from your office's predecessor (e.g., state fair attendance)?



House and Senate Schedules

Keeping up with Congress

House and Senate Schedules

- House vote schedule
- Senate vote schedule
- Committee scheduling
- Other time commitments

House and Senate Rules

- House Ethics
- Senate Ethics
- Have House/Senate Admin/rules and the Committee on Ethics on speed dial
- Always ask. Do not guess!



Working with Members

What makes members different from other bosses?

Put yourself in your boss' shoes

- What type of scheduling system works for your boss? For your chief?
- What questions does your boss need answered for meetings/events?
- What can you do to help your boss feel secure in their schedule and life?

Put yourself in your boss' shoes

- Working with:
 - Spouse
 - Family
 - Key stakeholders

Office Preferences Document

- Member's travel information and preferences
- Family preferences
- Member's personal information
- Family information (schools, contacts)



Goals and Vision

What is your member hoping to accomplish?

Setting Goals and Outlining a Vision

- What type of member does your boss want to be?
- What is important to the member and the Member's constituents?
- What are your office's goals?

Setting Goals and Outlining a Vision

- Goals are the framework around which you will build the schedule.
- Guide scheduler's judgement and decision-making
- Ensures member's focus throughout the year regardless of news cycle

Building Contact Lists

- Family
- Constituents
- Friends/VIPs
- Donors
- Coalitions
- Special Interests/Advocates



Crisis Management

What to do when things go wrong...and they will

Controlling the Chaos

- Scheduler exists at point of friction
- Never guess if you don't have an answer
- Three-pronged response:
 - I'm sorry.
 - I'm personally handling this.
 - This will not happen again.

Crisis Management

- How to maintain your composure when a member of Congress is yelling at you



Working with Staff

And making them work with you

Tips for Working with Staff

- Only the scheduler has edit access to the schedule (not even the chief)
- Compiling the briefing binder and getting what you need from staff
- Weekly/Bi-weekly calls with district director and appropriate team members



Scheduler Mindfulness

Take care of yourself

Scheduler Mindfulness

- Challenges of a remote environment
- Thinking about your boss and the Member's family holistically
- Flexibility and grace

Scheduler Mindfulness

- Eat
- Breath
- Take breaks/walks
- Delegation of tasks
- Advocate for yourself and your needs

Additional CMF Resources

- [Congressional Management Foundation | Scheduling](#)
- [Congressional Management Foundation | Keeping It Local](#)
- [Congressional Management Foundation | Setting Course](#)
- [Congressional Management Foundation | Keeping It Local](#)
- [Home | TBG Management \(tbgmngmt.co\)](#)

Additional CMF Resources

Sample Event Scheduling Form

BACKGROUND INFORMATION

Name/description of event:

Event sponsor:

Event date: _____ Event time: _____

Event location:

Sponsor contact name:

Sponsor contact phone, fax and/or e-mail:

Description of requested Member participation (if speech, give length and topic; if activity, give details):

Other VIPs attending: _____

Requested RSVP deadline: _____

Other info: _____

ACTION TAKEN

Confirmed _____ Regretted _____ Date: _____

If Confirmed Lodging (if needed):



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New Member Office Training

Setting Up Constituent Communications and Engagement

February 22, 12:00 pm



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