Scheduling & Events in Congressional Offices

Demanding Friends, Crucial Allies, and Managing a Three-Ring Circus

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Audio:
Dial In: 1-866-576-7975
Participant Code: 777-127
Introduction

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About SHRM

SHRM is the world's largest association devoted to human resource management, representing more than 250,000 members in over 140 countries.

SHRM has been conducting rigorous research on human resource management for more than 60 years, including compensation, benefits and workplace practices.

For more information, please visit http://shrm.org.
About CMF

- **Publications**: Setting Course, Keeping It Local, Congressional Intern Handbook

- **Management Services**: Strategic Planning, Team Building, Executive Coaching, Operational Assessments

- **Training**: Professional Development for Chiefs of Staff and Legislative Directors; District Staff Assistant Orientation Webinars and Writing Constituent Mail Courses (through CAO); Orientation Workshop for Staff of Members-Elect

- **Technology Research**: Communicating with Congress Project, Gold Mouse Awards
Keeping It Local

- Third edition published 2010
- Sponsored by a grant from SHRM
- Formerly “Frontline Management”
- Survey of and interviews with House & Senate District/State Directors
Poll 1: Participant Role & Office Location

Please complete the poll in the bottom right corner of your WebEx screen.

The title that best describes my position in the office is:

• District Director
• State Director
• Chief of Staff
• Deputy Chief of Staff
• Scheduler
• Field Rep/Caseworker/Constituent Services Rep
• Other

I primarily work in the:

• District/State Office
• Washington, DC Office
Agenda

I. Common Challenges to Scheduling Operations

II. 7 Steps for Planning Individual Events

III. Comprehensive Event Planning Checklist

IV. Q & A
Common Challenges to Scheduling Operations
Poll 2: Challenges in Strategic Scheduling

Please complete the poll in the bottom right corner of your WebEx screen.

Which of the following scheduling challenges has your office experienced? Check all that apply.

- Excessive travel time
- Over-scheduling
- Unpredictable congressional schedule
- Member unwilling or slow to make decisions
- Member over-involvement in scheduling details
- Family demands/spousal input
- Inadequate coordination between DC and district/state
- Scheduler provides inaccurate/incomplete information
Excessive Travel Time

- Reading Materials: Briefing Books, Newspapers, Clips
- Maximize Technology (Cell, Laptop, iPad)
- Thank You Notes
- Audiobooks
- *Sleep!*
Over-scheduling

- “Congressman, repeat after me: I’ll check on it and get back to you.”
- Scheduler Takes the Heat
- Community/Group Events
- Mobile/Office Hours

“If the group is mad at me, and not my boss, I’ve done my job.”

– House Scheduler
Unpredictable Congressional Schedule

- Set Expectations with Groups
- Create Events that can be Easily Cancelled or Rescheduled
- Identify Surrogates
- Teleconferences/Video greetings
Poll 3: Unpredictability in House Calendar

Please complete the poll in the bottom right corner of your WebEx screen.

Comparing the new House schedule in the 112th Congress to previous Congresses, please indicate whether you agree or disagree with the following statements.

• Our office can better manage the Member’s time.
• The district schedule is more predictable.
• The Member’s time in the district is more productive.
• The Member spends more time with district office staff.
• The Member spends more time with constituents in the district.
Member Unwilling/Slow to Make Decisions

- Demonstrate Consequences to Member
- Get Commitment to Deadline
- Immediately Communicate Missed Deadlines
- Lower Expectations with Member
  - Weaker Briefing Materials
  - Antagonized Groups
Member Over-Involvement in Details

- “Manage by Exception”
- Categories of Decisions and Scheduling Criteria Established
- Member Reviews Proposed Schedule – Changes Possible
- Member Makes 10% of Decisions
“The Member’s involvement is the exception, rather than the rule.”

—Keeping It Local, p. 122
Family Demands/Spousal Input

- *Conflict is Inevitable!*
- Clarify Roles & Procedures for Family Input
- Foster Relationship between Scheduler & Family
- Block Out Important Family Dates
- Establish Limits to Spouse’s Claim on Scheduler’s Time
Inadequate Coordination Between Offices

- Clear, Early Long-Range Planning by Scheduling Team
- Team Members Bring Mix of Skills and Creativity to Develop Big Picture Schedule
- Scheduler Aware of Local and DC Events

“Without good communication among staff, all the planning in the world will not magically bring about a dynamic event.”

– Keeping It Local
Scheduler Gives Inaccurate/Incomplete Info

- Use Uniform Scheduling Form
- Scheduler Drills Down on “Less Forthcoming” Groups
- Collect More Information Than Necessary

“I’ve become very wary of groups who won’t specify how many people will attend a meeting.”

— House Scheduler
## Sample Event Scheduling Form

Keeping It Local, Figure 5-5, p. 125

CMFweb.org → Resources by Topic → District/State Offices

### Sample Event Scheduling Form

<table>
<thead>
<tr>
<th><strong>BACKGROUND INFORMATION</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Name/description of event:</td>
</tr>
<tr>
<td>Event sponsor:</td>
</tr>
<tr>
<td>Event date:</td>
</tr>
<tr>
<td>Event time:</td>
</tr>
<tr>
<td>Event location:</td>
</tr>
<tr>
<td>Sponsor contact name:</td>
</tr>
<tr>
<td>Sponsor contact phone, fax and/or e-mail:</td>
</tr>
<tr>
<td>Description of requested Member participation (if speech, give length and topic; if activity, give details):</td>
</tr>
<tr>
<td>Other VIPs attending:</td>
</tr>
</tbody>
</table>
7 Steps for Planning Individual Events

“Focus on the big picture but don’t forget the tiny details.”

— House District Director
Poll 4: Success in Planning Events

Please complete the poll in the bottom right corner of your WebEx screen.

Please indicate whether you agree or disagree with the following statements.

• Our office is generally successful at planning and executing proactive events related to our strategic goals.
• Our office has occasionally experienced an error related to the planning or execution of an event, upsetting the Member.
1. Identify Events to Support Strategic Goals

- What need is the event fulfilling?
- How will the event promote or advance the Member’s goals?
2. Agree on Measurable Objectives

- Member and Staff Must Agree on 1-2 Objectives
- Examples:
  - Media References
  - Stakeholder Participation
  - Key Group Support of Strategic Goal
3. Establish Timeframe for Event

- Consider Congressional Calendar, Work Periods, Family Dates when Determining Timeframe
- Make Sure Enough Time to Successfully Plan
4. Designate Primary Staffer for Event

- Who “owns” success or failure?
- Which staffer has the best connection and skill sets for this event?
- What authority does the Primary Staffer have to tap office resources?
5. Make Action Plan for Event

- Who, What, When
- Utilize Checklist
6. Determine Responsibility for Each Task

- Primary Staffer Solicits Agreement for Tasks
- Seek Diversity in Providing Support/Advice
- Managers Should Seek Volunteers
7. Assign Deadlines

“I love deadlines. I love the whooshing sound they make as they fly by.”
— Douglas Adams

“Goals are dreams with deadlines.”
— Diana Scharf Hunt
Comprehensive Planning Checklist
Logistics

1. What kind of space is required?
2. What equipment is needed? (A/V)
3. What else is needed? (flip charts)
4. How will the office transport staff and materials?
5. How should the office take photos?
6. How should the audience be invited?
Logistics

7. Does the office have updated contact information on invite list?
8. How many people does the office expect?
9. How will the office handle overflow attendees?
10. Will invitations need to be approved by Franking?
11. What food arrangements are required?
12. How will Member get there? Who staffs him/her?
Program

1. Who should be invited to participate?
2. What briefing materials will the Member require?
3. What, if any, audience handouts should be prepared?
4. What research will staff need to do to prepare materials?
5. How will the office manage late arrivals?
6. How will the office handle last minute cancellations?
7. Could traffic be a factor?
Press/Media

1. What media is office targeting?
2. How will event be shaped to attract media?
3. How should media be notified?
4. Are briefing packets required?
5. What are TV/radio equipment set up requirements?
6. Should the Member meet with reporters before or after event?
7. What, if any, follow up work is required?
Advance Work

1. Who will test equipment?
2. Is lighting adequate?
3. What backdrop will be used?
4. Who will estimate Member travel time?
5. Does office/staff need security or police assistance?
6. Whom should the office contact if disruptions or threats are made?
Follow-Up

1. Whom does the office need to send thank-you notes to?
2. Are any activities required after the event?
3. What bills need to be paid?
4. What type of evaluation should be conducted to assess the event?
Formulating a Comprehensive Planning Checklist

Even with the best planning, communication and coordination, unexpected “surprises” are bound to happen. The following questions, compiled from district/state staff, can prevent last minute glitches by helping craft a comprehensive event action plan, which could then be used as a template for future events.

**Logistics**

1. What kind of space is required?
2. What equipment is needed (e.g., a podium, microphones, video camera, projector, laptop, lighting)?
3. What else is needed (e.g., flip charts, notepads, water pitchers, extra chairs)?
4. How will the office transport staff and materials (e.g., signs, handouts)?

**Press**

1. What type of reporters or media is the office trying to reach (e.g., dailies, weeklies, TV, radio, blogs)?
2. How can the event be shaped to attract them?
3. How should reporters be notified (e.g., press release, e-mail or phone calls)?
4. Are briefing packets necessary?
Q&A
Evaluation

Please tell us what you think of today’s discussion.
Webinars for District/State Directors

1. **Scheduling & Events:**
   Demanding Friends, Crucial Allies, and Managing a Three-Ring Circus
   *Tuesday, May 24*

2. **Fostering a Strategic Outreach Culture:**
   Connecting Members, Staff and Stakeholders to Advance Your Agenda
   *Wednesday, June 22*

3. **District/State–DC Office Relations:**
   The Joys of Harmony, the Perils of Disunion, and the Path to Collective Serenity (almost)
   *Tuesday, July 26*
Congressional Management Foundation

CMF is a 501(c)(3) nonpartisan nonprofit dedicated to helping Congress and its Members meet the evolving needs and expectations of an engaged and informed 21st century citizenry.

Please visit our website for additional resources:

Resources by Topic → District/State Offices
Publications → Keeping It Local

http://CMFweb.org
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