Fostering a Strategic Outreach Culture

Connecting Members, Staff and Stakeholders to Advance Your Agenda

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

- Bradford Fitch
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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
About CMF

- **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: Role & Office Location

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. Obstacles to Conducting Strategic Outreach
II. Creating an Outreach Culture
III. Identifying Outreach Opportunities
IV. Evaluating Outreach
V. Q & A
Obstacles to Conducting Strategic Outreach
Poll 2: Obstacles in Strategic Outreach

Which of the following obstacles in conducting strategic outreach has your office experienced? Check all that apply.

- Overwhelmed with responding to constituent requests
- Staff uncomfortable with promoting an agenda
- Relying too heavily on core supporters
- Staff feel only the Member can perform outreach
“An office can attain more – and often bigger – successes by working strategically and methodically toward specific goals rather than applying a completely reactive and often scattershot approach to district/state activities.”

– Keeping It Local, p. 87
Obstacles to Conducting Outreach

1. Offices are overwhelmed with responding to constituent requests.

2. Staff are uncomfortable with promoting an agenda.

3. Office relies too heavily on core supporters.

4. Staff feel only the Member can perform outreach.
“The most effective district/state offices are those that make the time to focus on strategic outreach, while still maintaining responsive constituent service operations.”  

– Keeping It Local, p. 86
4 Ways to Foster an Outreach Culture

1. Promote Creativity and Strategic Thinking

2. Provide Staff Context and Perspective:
   • Strategic Planning
   • Stakeholder Analysis
   • SWOT Analysis

3. Brainstorm and Discuss Ideas as a Group

4. Address Staff Concerns about Outreach
Stakeholder Analysis

Identify all who can “stake a claim” on Member/office attention or which can affect the Member/office

Analyze and rank importance of each group as: (a) Essential, (b) Important but not Essential, or (c) Marginally Important

Grade office’s performance in meeting needs and expectations of “essential” stakeholders

Develop outreach strategies to better meet the needs and expectations of most important stakeholders
SWOT Analysis

Strengths
Opportunities
CAPITALIZE

Weaknesses
Threats
MITIGATE

INTERNAL
EXTERNAL
“Whichever opportunities for outreach the office chooses, it is essential they be integrated with one another and that they grow out of the overall planning process.”

—Keeping It Local, p. 93
Identifying Available Opportunities

- Should you participate in events scheduled by others that could help achieve the Member’s goals?
- What kinds of initiatives can you develop that will generate support for the Member’s goals?
- With which groups should you be meeting? What do you want to accomplish by meeting with them? Why and how might you want to work more closely with them in the future?
- Is there a trend, hot issue or popular forum you can or should take advantage of?
Selecting the Best Opportunities

1. Does the proposed activity support achievement of one of the office’s goals?

2. Is the cost of pursuing this outreach initiative – in staff time, money or other lost opportunities – worth the benefit?

3. Is the activity likely to generate favorable and prominent press coverage?

4. Will the proposed outreach initiative reach the office’s essential stakeholders?

5. What are the obstacles to success, and what can the office do to overcome them?
Evaluating Outreach
Poll 3: Evaluating Your Efforts

Which of the following has your office used to evaluate the success of your events? Check all that apply.

- Formal survey of event attendees (at event)
- Informal assessment of select event attendees (after event)
- After action review with staff
- Media assessment (amount & quality)
Basic After Action Review

1. What went well?
2. What did not go well?
3. What can or should we do differently next time?
4. What else should we keep in mind when conducting this type of activity?
More Detailed After Action Review

1. Were the objectives of the outreach activity clear?
2. Were communication and coordination smooth?
3. Was there adequate planning? Was the timeline realistic? Was the action plan comprehensive enough?
4. Were there adequate resources (staff, time and money) for this initiative?
5. Who was in charge? How were decisions made?
6. Was the staff well prepared?
Q&A
Evaluation

Please tell us what you think of today’s discussion.
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*
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

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