Setting Up a Congressional Scheduling Operation
Friday, February 12, 12:00 PM – 1:30 PM

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• New Member Resource Center
  ▪ Google: “CMF New Member Resource Center”
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  ▪ Keeping It Local
  ▪ Templates/Manuals/Forms
• Website Guidance
  ▪ Gold Mouse Awards for Best Website
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.
# 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.

<table>
<thead>
<tr>
<th>Activity Details</th>
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<tr>
<td><strong>Location of Event:</strong></td>
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<td>- Select -</td>
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<th>Event Date:*</th>
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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!
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 (tbgmgmt.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):

____________
Setting Up Constituent Communications and Engagement

February 22, 12:00 pm
Setting Up a Congressional Scheduling Operation

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