

MODERNIZATION — STAFF — ASSOCIATION

New Office Guide: District/State Staff Assistants

The following guide walks you through the early days of starting as an SA in a new state or district office, including what questions your office should answer collectively and what to-dos you should accomplish in your first few months.

Table of Contents

[Physical Space](#)

[Staff Onboarding](#)

[CRM Vendor](#)

[Security](#)

[Understanding your Role and Office Structure](#)

[Phones](#)

[Intern Training and Management](#)

[Additional Resources](#)

Physical Space

You have an entirely new office to set up! It's time to work with your office leadership to start developing an office floor plan and picking out furniture.

In addition to setting up a new space when you first move in, the Staff Assistant is also typically responsible for maintaining the office's physical space during normal operations. This includes morning setup (unlocking the office, turning off the security system, setting out newspapers and other materials, sorting the mail, and turning on the phones), daily maintenance (keeping public-facing areas clean, managing the flow of traffic for meetings) and end-of-day cleanup and reset. It will be helpful to work with your leadership to...

- ☐ Create an office opening checklist.
- ☐ Set up your mail hood and figure out how to use it. Some offices also choose to send their mail to DC first and then have it sent to the district for security reasons.
- ☐ Design your office layout for maximum comfort and usability for both staff and visitors. ***CAO can help with this in the House.
- ☐ Purchase decorations, including branded posters/signs through House Creative Services or GSA (House or Senate).

Q: How should you greet different visitors and groups when they arrive? Will your interns be involved, do they need to check in somehow, should you Teams message the person they are meeting with, etc.

Staff Onboarding

The Staff Assistant is usually responsible for onboarding new staff and interns. This includes training them on office protocols and facilitating the setup of equipment and user accounts with your technology support contact.

- ☐ Help draft a staff handbook with FAQs on technology, mandatory trainings, office Standard Operating Procedures (SOPs), etc.

Q: Will your office use the free in-House technology services through the House CAO (TechPartner+) or Senate SAA, or contract with an outside vendor for tech support?

Q: Will your office hire [Green and Gold](#) (House) or other temporary staff or fellows?

Q: Are you responsible for tracking mandatory trainings for district staff, or does your DC counterpart handle all of them?

- ☐ Purchase new equipment and coordinate with your technology partner on setting up office accounts and the devices.
- ☐ Take your mandatory trainings (link for [all House trainings](#) or [Senate Anti-Harassment](#), [Senate Ethics](#), and [Senate Cybersecurity](#)).

CRM Vendor

Q: What system will your office use to track, receive and respond to constituent correspondence and casework?

Q: Who in the office is in charge of creating new accounts and assigning permissions in your CRM?

This question will have already been decided by the time you're hired. The Chief/Member makes the final decision, especially since it is an expensive part of the office budget, but you and the casework team are usually the more frequent users of this system in addition to the Legislative Correspondent(s) in DC, so it might be worth voicing your opinion.

Options: IQ, Fireside, Indigov, iConstituent

- ☐ Make sure you contact your CRM representative to establish a relationship.
- ☐ Take any CRM-specific trainings, and help facilitate CRM trainings for your casework team if helpful.
- ☐ Set up the "Get Help with a Federal Agency" page and any other information about in-person appointments on your Member office website.

Security

Unfortunately, threats toward politicians and political offices are on the rise, so strong and clear security procedures are even more important.

- ☐ Write a security policy that explains protocols for different circumstances (such as whether you answer anonymous phone calls) and who in the office has what responsibilities (such as conducting active shooter drills). (House and Senate)
- ☐ Request a [District Office Security Assessment](#). (House)
- ☐ Reach out to your [assigned Security Specialist](#) through the House Sergeant at Arms for assistance acquiring security systems, equipment, and mail safety hoods; receiving guidance on physical security enhancements and how to select a secure district office space; and learning more about the available [Law Enforcement Coordinator \(LECOR\) Program resources](#). (House)
- ☐ Schedule an Emergency Preparedness Training through SAA. You can take trainings on demand and/or schedule someone to come in person and do a walkthrough of your space. ([House](#) and [Senate](#))
- ☐ Contact your local police department and ask them how they would like you to handle stalkers, threats, protests, and emergency vs. non-emergency situations. The US Capitol Police support district offices as well, and all threats should be reported to them at 202-224-1495 or threats@uscp.gov, but it is also important to develop a good relationship with your local police early. (House and Senate)

Q: How accessible will your office be to the general public? A lot of offices are shifting to appointment-only models, while others have open door policies. Notes from other staffers:

- If there are not at least two staffers on site, our policy is not to bring anyone into the actual office.
- If there are not at least two staffers on site, our policy is not to bring anyone into the actual office.
- If we have a bunch of aggressive people, we do allow them in, but only one at a time.
- We have a non-recording policy in our office.
- I encourage a sign-in sheet for security reasons.
 - I have people sign in on a sheet on a clipboard and then have interns put in the information in an Excel sheet.

Understanding your Role and Office Structure

The Staff Assistant job includes a lot of “random duties as assigned”, but it’s important to understand what regular duties fit within your role since they vary significantly from office to office. **Determine who in your office will manage:**

- ☐ Art Competition (House)
- ☐ App Challenge (House)
- ☐ Service Academy Nominations (House and Senate)
- ☐ Administrative support for Congressionally Directed Spending (if your team participates) (House and Senate)
- ☐ Staffing the Member at district events (House and Senate)

Some other commons tasks for District/State Staff Assistants:

- Paying and managing utilities for the District Office (such as the landscaping company or phone bill), tracking receipts, and managing travel reimbursements
- Writing referral letters to state agencies or nonprofits
- Writing program letters for events, so if we can’t to a certificate request because it is for 100 people we will write a congratulatory letter to everyone
- Submitting a regular [Franking report](#) ([House](#) and [Senate](#))

Q: Will you have a casework portfolio (and what is it if so)?

Q: Will your office have a dedicated casework intake staffer? This could be you as an SA, a caseworker, or its own job, but some offices don’t have this role at all. Intake is

often the most time-consuming part of the process, so it can be useful to have a dedicated role to save time, but it's also an opportunity for a caseworker to build trust and gain relevant details using their expertise.

Q: What relationships/stakeholders will you personally maintain? For example, you might be the POC for answering questions and attending events for political science and civics departments if you are advertising your intern program with them.

- ☐ Learn who your [CAO Customer Advocate](#) is (House)
- ☐ Learn who your General Services Administration (GSA) [Congressional Support Representative](#) is (House)

Phones

The phones will start ringing immediately! Make sure you are knowledgeable about the services you offer and how to answer FAQs.

Q: If a call is casework, how much information gathering or intake should you or your interns do on the front end?

- ☐ Set up your office voicemail.
- ☐ Create a phone training guide that includes a list of FAQs and exactly how to respond in specific scenarios. Consider adding in a practice or role-play component for interns who may not have experience picking up the phone.

Intern Training and Management

The Staff Assistant is often, but not always, in charge of recruiting, hiring, and managing interns.

- ☐ Create a guide for handling in-person walk-ins.
- ☐ Start a group chat for you and your interns and encourage them to ask all questions there so everyone can see the answers.
- ☐ Develop your team's intern handbook.

Q: Is advertising, recruiting, selecting, and training interns your responsibility? If so, are there any expectations from your team's leadership for how they would like these tasks handled? Be sure to confirm dates and finances for available stipends.

Q: What is your policy on intern recruitment? Some offices only recruit from particular colleges and have certain relationships, others advertise far and wide.

Q: How will your team handle assignments and management for your interns? Some offices choose to “attach” interns to specific caseworkers or operational teams, and others keep their roles more general. Some also decide to have a casework-specific intern.

Q: What is your priority in hiring?

Examples of unique intern projects from the last [MSA District Junior Staff Roundtable](#):

- We have a semester-long project where interns pick two to three federal agencies, have them write an initial memo with a brief overview of the agency, and then each month they are tasked to sit down, redo their memos and give an update on what is happening with that agency. They then produce a writeup at the very end.
- I have our interns do social media reports and monitor what is trending and what people are posting about and what is performing best and worst on different platforms.
- We have interns research the types of constituent outreach we already do regularly in our district and brainstorm where we need to be putting more effort. They present their findings to the District Director and Member.
- We task interns with finding different district events for our boss to attend via Facebook or Eventbrite, especially where the Member might not be expected to show up. Constituents love it!
- We do extensive casework training and have interns manage a handful of cases each term.
- We have a buddy system where we pair interns with caseworkers in their field of interest.

Additional Resources

- [MSA Notes from District SA Roundtable \(12/19/24\)](#) (House and Senate)
- Staff Academy: [New District Staff trainings](#) (House)
- CAO Coach Video: [Standing up your District Office](#) (House)
- [CAO Coach Staff Assistant Resources](#) (House)

- [Working with Whistleblowers District Starter Pack](#) (House)