

PROTOCOL FOR STAFFER CLASSIFICATION

2017 “Congress and Its Experts” Research Lab

PI: Jesse M. Crosson

STEP 1 – CLEANING THE DATA

1. We need these spreadsheets to be basically identical to those made by the RAs collecting the 90s data. Thus you’ll need to do a couple of data-cleaning things.
2. First, clean the member’s name. I want the name to be in the following format: LAST NAME, FIRST NAME MIDDLE INITIAL (in all caps). So, my name would be: CROSSON, JESSE M.
3. Next, you’re going to need to fill in the district name, since the data are not in the format I want it in. To do this, **wait until after you are at step 5**. Then, once you are in the Yellowbook, you can go ahead and fill in the district number.
 - a. The format I would like is “STATEABBR#”—no spaces. In other words, California’s 10th congressional district would be: CA10.

STEP 2 – CLASSIFICATION: THE EASY CASES

1. For all “easy cases,” I want you to *leave the classification section blank*. I will fill those in with a computer program, which will save us some time in the long-run.
2. A case is “easy” if the job title:
 - a. Contains the letters “legis”
 - b. Contains the letters “constit”
 - c. Contains the letters “casework”
 - d. Contains the letters “district”
 - e. Contains the letters “communic”
 - f. Contains the letters “press”
3. A case is also considered “easy” if the job title is:
 - a. “field representative”
 - b. “systems administrator”
 - c. “grants coordinator”
 - d. “intern”

STEP 3 – THE HARD CASES

1. If the title does not fall into any of the categories in Step 2, then it is a “hard case.” For this step, you’ll need to know that category codes. Here they are:
 - a. **Legislative staff = 1**
 - b. **Political management = 2**
 - c. **Communications = 3**
 - d. **Office management = 4**
 - e. **Constituency service = 5**
2. For all hard cases, please write “unc” into the classification cell and then highlight the cell **blue**.
3. Once you have a decent number of blue cells, turn to the corresponding edition of the *Congressional Yellowbooks*.

4. For each unclear case, look up the name of your staffer in the corresponding *Yellowbook*. Based on the information you see in the entry, you may be able to make a classification decision, according to the following steps.
5. First and foremost, if the staffer has **legislative issues** listed under the name somewhere, **classify them as legislative staff (code 1)**.
6. Second, if the staffer is **located in a district office**, **classify them as constituency service (code 5)**, unless their title includes an automatic code from Step 2.
7. If there are **not** legislative issues, it gets a little complicated:
 - a. If the person is a chief of staff or deputy chief of staff, mark them as *political management*— unless they have an additional title in the *Yellowbook*. If they do, highlight the cell **yellow**, and we will discuss it.
 - b. If the person is an administrative, staff, or executive assistant and is **paid more than \$10,000**, mark them as *political management*.
 - i. Similarly, if they are **paid less than \$10,000**, mark them as *office management*.
 - c. If the person is a shared employee, mark them as *political management*.
 - d. If the person is marked as counsel, mark them as *political management*.
 - e. If the person is marked as an office manager, mark them as *office management*.
 - f. If the person is marked as a special projects coordinator, mark them as *constituency service*.
 - g. If the person’s title references veterans or veteran services, mark them as *constituency service*.
 - h. If the person’s title includes “scheduler,” mark them as *political management*.

SUMMARY: Step 3 Classifications – (assuming no legislative responsibility)	
<i>Title</i>	<i>Classification</i>
Chief of Staff / Deputy Chief of Staff	Political management
Scheduler	Political management
Administrative/Staff/Executive Assistant – over \$10k	Political management
Administrative/Staff/Executive Assistant – under \$10k	Office management
Shared Employee	Political management
Counsel	Political management
Office Manager	Office management
Special Projects Coordinator	Constituency service
<i>Includes veterans or veteran services</i>	Constituency service

STEP 4 – FURTHER NOTES/THINGS TO CONSIDER

1. If you are ever unsure about how to classify a case, please do not hesitate to mark it in yellow and ask me about it during our next meeting. We want these to be accurate, first and foremost.