NAVIGATING REDISTRICTING FOR CASEWORK TEAMS

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This guide is a product of the POPVOX Foundation; it is not endorsed in any way by the CAO or any other official office, and has not been reviewed by the House Ethics Committee.

As former staffers, we know that the on-the-ground, Member-specific, caseworker-specific, and case-specific practices that each team builds on the foundation of the “official” guidance are where good casework happens.

In planning for redistricting, your team should start with the excellent guidance and resources from the CAO’s transition team (transition.house.gov) and the professional staff at the House Committee on Ethics and the House Office of Legal Counsel where appropriate.

This guide is intended to be an additional perspective for teams looking for further ideas and support, like calling up a caseworker in a neighboring delegation for their advice.

We’d like to thank staff from Fireside 21, Leidos, Indigov, the CAO’s transition team and coach program, and caseworkers from several offices in the House and Senate for their review and feedback.

Suggestions, comments, questions? Drop us a line at anne@popvox.org.
PRINCIPLES FOR A SUCCESSFUL CASEWORK TRANSITION FOLLOWING REDISTRICTING

GETTING STARTED

Redistricting is the process of redrawing Congressional district lines after the decennial Census. For House offices, the redistricting process means that the boundaries of Congressional districts will shift every ten years—sometimes dramatically.

For casework teams, the redistricting process can mean a complicated set of decisions and operations around transferring open cases to constituents’ new representatives. It is not easy to be on the transferring or receiving end of a casework handoff. But, these processes provide an opportunity to make a great impression on new constituents, and to make sure that the cases you have worked on have the best possible chance of success.

Having a clear plan for how your team will handle redistricting will minimize the work involved and help you manage expectations for constituents.

This quick guide offers starting points to help you develop that plan—including working with your casework software provider and the CAO’s transition team to handle the details. This guide is not prescriptive. We know there are many ways to go about these transitions. But our goal is to prompt thinking and planning that will make this transition easier for your team and your constituents.

THREE QUESTIONS FOR REDISTRICTING

What do you (the caseworker) need?

What does your constituent need?

What does the other office need?

Redistricting plan
MAKING A REDISTRICTING PLAN

Conversations to start planning

The first step toward a successful plan is communication: with your team, with other teams, your CMS vendor, and your constituents and stakeholders.

Talk to your team

- Beyond the data consent release (next page!), it may be helpful to talk about messaging with your Member. Does your Member feel that it's important for their signature to be on any handoff/onboard letters? How much do they want to be read in on new cases?
- If your office is particularly engaged on tracking casework metrics, how will you plan to integrate new cases into your analytics?
- What criteria will you use to decide cases that should not be transferred? Again, we'll cover some special cases in more detail below.
- How will you even out any significant imbalances in your team's casework portfolios from this transfer?
- Understanding that this is going to be an addition to your normal workload, are there any other resources (e.g. another paid intern, or borrowing part of a staff assistant's time) that your team will need to be successful?

Talk to neighboring offices

- While they may not have a full list of cases yet, can they give you a sense for how many cases they'll be sending your way? Can you do the same for cases you'll be offloading to new offices?
- Is their Member planning to authorize their CMS vendor to transfer cases to your team? Can you let them know what data your Member has authorized your CMS vendor to transfer to them?
- Can you agree on a date after which you will each no longer take on new cases in areas that will be redistricted? (e.g. although the boundaries formally shift January 3rd, will you start referring cases now in a new district after December 1st?)
- Can you start making a plan for how to introduce constituents to their new caseworkers? Do offices transferring cases to you have a plan? We'll cover this more later!

What do you (the caseworker) need?

✓ Clear guidance from your team on priorities and resources
✓ Strategy to manage the time and effort of redistricting
✓ Reliable coordination with offices sending/receiving cases with your team
✓ Technical support from your CMS provider
YOUR TIMELINE AT A GLANCE

There is a lot to do in just a few months! But you can break it down into a few distinct phases that will help you get ready: preparation this fall through mid-November, handoffs with constituents through the beginning of the new Congress, then onboarding your new cases and integrating them into your caseload and outreach work.

**PREPARATION**
- Start flagging the transition for affected constituents
- Have your Member authorize data transfer: turn in form to CAO after November 9th, [optional] send copy to CMS provider
- Talk with your team and other offices involved
- Clean up the cases you’ll be transferring: make sure case notes are clear, documents are organized

**HANDOFF**
- Deliver any briefing materials not transferred by your CMS provider to the new office
- **Around January 3rd:** CMSs transfer cases
- Audit new cases coming your way to make sure you’re clear on the goals and actions taken
- Introduce yourself to new constituents and/or arrange warm handoffs for all incoming and outgoing cases

**POST-HANDOFF**
- Prioritize follow up on new cases if needed
- Set clear boundaries for constituents who have been transferred to a new office
- Reach out to stakeholders to make sure they’re clear on where to send referrals
- Host any routine casework outreach events in your district’s new areas to make sure people know how to find your team
WORKING WITH YOUR CRM/CMS VENDOR

Constituent data and privacy

Your Member is the sole owner of the data in your CMS, including constituent data in casework, and they have sole authority to release or transfer that data to other Congressional offices.

This means that in order for your CMS provider (IQ, Fireside, Indigov, etc) to transfer cases to their new districts, they must have your Member’s signature on a Data Consent Form submitted to the CAO. We strongly recommend that Members authorize transferring all case data in redistricting transitions and office closures.

This form is available for download today, but becomes interactive on November 9th at transition.house.gov. While Members have until the end of the Congress to submit this form, the sooner your Member authorizes that transition, the more time you will give your team and your CMS provider to ensure a smooth transition. The interactive form will automatically be sent to your CMS provider, but you may want to download and email a copy separately just in case.

Regardless of whether your Member transfers data, in order for the constituent’s new office to continue to act on their behalf, the constituent must submit a new Privacy Act Release Form for their new Representative’s office. We would also recommend flagging the transition for constituents early, giving constituents the courtesy of expressing a preference to have their cases closed instead of transferred.

What happens for transfers to/from freshman offices?

Once again, this comes back to the decision your Member makes, and/or the decision the outgoing Member makes on authorizing data transfers. New offices will sign contracts with CMS vendors in December, meaning that those vendors can start building databases that will be able to receive transfers (and other functions like receiving mail) on January 3rd.

For offices that do not have CMSs up and running, you may want to discuss a specific plan with your team’s leadership, any contacts from incoming or departing offices, and your CMS vendor to see if it may be possible to manually transfer cases or hold on to cases until that office is up and running.

What happens for transfers between different CMSs?

All CMS providers are able to export your cases in a format that can be uploaded to other CMSs. If you have questions about your specific situation, we would highly recommend reaching out to your office’s CMS vendor, or to the CAO’s transition support team. Please see the next page for specific contact information.
WORKING WITH YOUR CMS/CMS VENDOR

CMS Transition Feature Comparison

Please note that some transition functionality is different between the CMS vendors. We strongly recommend contacting your CMS provider for more information.

As noted on the previous page, your Member has until the end of the Congress to return the form expressing their preference for transferring all, part, or none of their data. However, the sooner your CMS provider has that signed form, the sooner they can get working to make sure that transition goes smoothly for your constituents.

The three vendors below* have expressed that **November 15th** would be ideal for letting them know how your office plans to proceed—please note that is not an official deadline from the CAO. This is also not when your cases will transfer, so there is no need to have your handoffs prepared by this date.

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<tr>
<th></th>
<th>Fireside 21</th>
<th>Indigov</th>
<th>Leidos (IQ)</th>
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<tbody>
<tr>
<td><strong>Option to run a report to see redistricted cases ahead of Jan 3rd</strong></td>
<td>Yes, with manual zip code input</td>
<td>Yes, with manual zip code input</td>
<td>Yes</td>
</tr>
<tr>
<td><strong>Option to automatically bulk transfer cases through Jan 3rd using the CAO’s secure data exchange</strong></td>
<td>Yes, free of charge</td>
<td>Yes, $1,000 per data export</td>
<td>Yes**</td>
</tr>
<tr>
<td><strong>Option to manually transfer cases ahead of Jan 3rd</strong></td>
<td>Yes, individual PDF download</td>
<td>Yes, individual PDF download</td>
<td>Yes, individual PDF download</td>
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<tr>
<td><strong>Option to create custom notation for cases opened/closed via redistricting</strong></td>
<td>Yes</td>
<td>Yes (cases automatically tagged as ‘out of district’)</td>
<td>Yes</td>
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<td><strong>Contact information</strong></td>
<td>Your team’s customer success manager, or <a href="mailto:help@fireside21.com">help@fireside21.com</a></td>
<td>Your team’s customer success manager, or <a href="mailto:support@indigov.com">support@indigov.com</a></td>
<td>Your team’s customer success manager, or <a href="mailto:house.sales@leidos.com">house.sales@leidos.com</a></td>
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<tr>
<td><strong>CAO Transition Team</strong></td>
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<td>transition.house.gov</td>
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*Reps from other CMS vendors are welcome to reach out to info@popvox.org to submit information.

**Custom transfers and data conversions may be available for a fee.
PREPARING CASES FOR HANDOFF

Taking some time to make sure that a case is clean and well-organized will pay off in the long term by building or keeping your team’s goodwill with your neighboring offices, ensuring that your hard work on transferred cases isn’t wasted in a disorganized transition, and avoiding panicked phone calls from caseworkers or constituents missing vital information at a crucial moment.

To make the work less intimidating, consider developing a phased handoff prep plan (e.g. each caseworker with cases to transfer preps X cases per week through DATE when your team plans to start messaging to constituents), or involving some of your team’s interns to help write draft case summaries, copy and paste emails, or relabel documents.

What does the other office need?

- Clear information on cases from your team, including next action steps, communications records, and documents
- Constituent handoff that sets them up for success and trust

### Does this case have...

- ✓ Updated constituent contact information
- ✓ A clear goal statement or case summary
- ✓ Clear tags for which agency and program(s) involved in the case
- ✓ Copies of all of my correspondence (agency and constituent)
- ✓ Contact information for all agency contacts involved
- ✓ Clear notes on the next expected action and deadline
- ✓ Any additional background information on the constituent’s circumstances or communication preferences that may be helpful for a new caseworker

### Have I made sure to...

- ✓ Check that all documents for the case are clearly named and dated
- ✓ Clarify any notes that may be confusing or taken out of context —especially notes taken from phone calls with the constituent and agency involved
- ✓ Where possible, take the next step needed in the case to buy the next caseworker time to review
- ✓ Flagged for the agency(s) involved that the case will be transferred to a new office
- ✓ Add the case to a list of redistricted cases for our interns/staff handling the phones
UNUSUAL CASES

Ethics rules around case transfers

The House Ethics manual (2008 edition) states that:

“The statute that establishes the Members’ Representational Allowance provides that the purpose of the allowance is “to support the conduct of the official and representational duties of a Member of the House of Representatives with respect to the district from which the Member is elected.” This statute does not prohibit a Member from ever responding to a non-constituent. In some instances, working for non-constituents on matters that are similar to those facing constituents may enable the Member better to serve his or her district. Other times, the Member may serve on a House committee that has the expertise and ability to provide the requested help. […] As a general matter, however, a Member should not devote official resources to casework for individuals who live outside the district.”

For most cases, this guidance is straightforward and the transfer will be a fairly straightforward process; however, as caseworkers know, some cases and constituent relationships are anything but straightforward. The following types of cases may require extra attention to taking care to brief the receiving caseworker well on all of the case’s details, or extra discussions with the constituent to (as a courtesy, not a requirement) determine their preferences on whether their cases should transfer or close.

➡ Cases expected to close imminently: For cases expected to close in the very near future, it may make more sense to prioritize work that will help close out the case ahead of the end of the Congress, rather than putting the constituent through a transfer.

➡ Cases where the Member has special expertise: As noted in the Ethics manual excerpt above, some Member may take on cases for non-constituents where they have particular expertise, whether related to their Committee assignments or in another area of particular expertise (e.g. the Afghanistan withdrawal).

➡ Cases where the constituent has experienced or is experiencing significant trauma or mental health challenges: As the CAO notes in its casework materials, caseworkers are not social workers, and should not be expected to perform a social work role. However, as we’ve noted before and elsewhere, you know your constituents best: for constituents experiencing difficulties that may make it especially challenging to go through a casework transition, it may be worth discussing your options and approach with your team’s leadership and with staff in the new office that will be taking the case on to make sure that the constituent has adequate support.
STEPS FOR A SUCCESSFUL HANDBOFF

1 Explain the upcoming transition

For constituents not following the news closely, the redistricting process may come as a surprise. The first step for this transition is notifying your constituents that it is happening, and answering their questions. Be ready to explain:

- What is redistricting, and why it means that your team can no longer handle this constituent’s case
- What to expect in the transition, including how their case data will be transferred
- Timeline for the transition, and how to reach their new caseworker

Understanding that this may be worrying for some constituents, a personal phone call may be very welcome; we also recommend following up with an email or letter with additional information for the constituent (we have a template at the end of this guide!).

2 Set up a ‘warm handoff’

To make sure that no cases fall through the cracks, we would strongly recommend setting up a ‘warm handoff’ between constituents and their new caseworkers wherever possible.

A ‘warm handoff’ is when instead of providing contact information to a constituent and asking them to reach out, you take the extra step to facilitate an introduction—like cc’ing the constituent and their new caseworker together on an email, a conference call or Zoom, or even a short in-person meeting. You probably already do this every day for referrals! While it may take a bit more time, a warm handoff builds trust, prevents miscommunications, and leaves constituents with a great final impression of your team and Member.

As always, you know your constituents best, and can prioritize which constituents may benefit most from a personal connection, and which may be happy with an email. You may even consider coordinating with the other office to host in-person or Zoom office hours where constituents can drop in for short introductory meetings with you and their new caseworker.

One of the most important pieces of this transition is making sure that the constituent completes a new Privacy Act Release Form for the office taking on their case. The warm handoff is a great place to send that blank PARF or remind the constituent that it’s coming.

3 Follow up to make sure tech transfer went well

No matter how well you’ve cleaned up your cases and prepared the constituent and their new caseworker, there will always be some details that fall through the cracks. It may be helpful to schedule a short follow up with the new office at a reasonable interval after the transition to make sure that all of the transferred cases came through, and check if they have any questions or have had any trouble getting in touch with any constituents. Scheduling this in advance may reduce the back-and-forth with questions!
While you can hope that every office will take casework handoffs as seriously and prepare as comprehensively as your team will, ultimately the only thing that you can control in redistricting handoffs is how you handle your own casework. For most caseworkers, onboarding will be the mirror image of case handoffs. Setting aside time early to review materials before you reach out to the constituent or the agency will help build trust and help you prioritize.

**Audit your new cases**

While you will (hopefully!) have gotten a good sense from your neighboring offices of which cases are coming your way, the final accounting will happen when the new cases hit your CMS. Working by yourself or with an intern, it will be helpful to go through and make sure that each case has:

1. A clear statement of the case goal
2. Clear records on the agency contacts involved
3. Clear notes on where the case is and what work still needs to happen
4. Updated contact information for the constituent
5. Clear and labeled case documents

**Contact your new constituents (get that Privacy Act permission!)**

With a good sense for how you’ll need to prioritize your incoming cases, you can start contacting your new constituents if you haven’t already done a warm handoff with the team handing the case off to you. As part of that handoff, don’t forget to get a new Privacy Act form if the constituent has not already provided one.

Depending on how thorough the handing-off office has been in explaining the redistricting process to constituents, you may need to spend some time answering questions. You will probably also want to walk new constituents through your team’s process, how they can best contact you, and what they can expect from you as you work to help resolve their case.

**Reach out to the agencies involved**

Once you’ve reviewed the case and talked to the constituent, the next step is to go ahead and get started. Whether it’s a familiar casework contact or a new one, it’s a good idea to reach out to ask that the agency update any records they have on this case to add your contact information, and provide the new Privacy Act Release Form. If you know enough to about the case to figure out the next step, now is also a great time to ask for it; if not, asking for a general status update will also be helpful.

Again, if you have enough cases with a particular agency contact, it may be helpful to see if they have time to go over all of them in one batch with you.
Flag for referrals

Whether this responsibility falls to you or to your outreach team, a friendly heads up about any shifting district boundaries will be helpful for stakeholders who may refer cases to you in the portion of your district that has changed. This may include state or local elected officials, referring stakeholders like Veterans Service Officers, local health clinics, senior centers, immigrant support agencies, homeless shelters, churches, charitable organizations, and more.

Especially if you are taking on a part of the district you have not previously covered, introducing your team and sharing some info or materials about how your team does casework is a nice touch. If your team regularly does outreach events focused on casework, you may consider scheduling office hours or a town hall in the redistricted portion of your district and inviting stakeholders and constituents whose cases have been transferred to meet your team.

For stakeholders you will no longer work with, a short note with thanks for their partnership is a polite gesture—you never know where the districts will be redrawn in ten years!

Setting constituent boundaries

While this transition will be no problem for many constituents, there will always be some constituents who forget or misplace their new caseworker’s information (or frankly, prefer your office). While it might be tempting to continue to work with them, in the long run, it will be helpful to set boundaries to make sure that the transition ‘sticks.’

Have a list of transferred constituents ready for your interns on the phones: instead of having the interns connect the constituents to you, have them ready with a short, polite script to remind the constituent that their case is no longer with your office, and offer to transfer their call.

Have a response ready for constituents who continue to email you: having a short, polite email ready to copy and paste (cc’ing their new caseworker if appropriate) will help

Have a suggestion ready for constituents who complain about their new office: It’s going to happen! And in general, it’s not appropriate or helpful to entertain complaints about a neighboring office. For constituents who have serious reservations about their case being transferred, as a last resort, you might offer to connect them to one of their Senators instead.
Warm handoff + PARF ask

Dear [CONSTITUENT],

As we discussed on the phone on [DATE, due to the recent redistricting process in [STATE], [NEW REP] will now be your official representative in Congress.

The point of contact in [NEW REP]'s office who will be working with you to resolve your case going forward is [NEW CASEWORKER], who I have copied on this email. [He/She] is also reachable at [OFFICE PHONE NUMBER]. I have fully briefed [him/her] on your case, and am confident that you are in great hands going forward. Our office will also provide their office with relevant records on your case to date, so there is no need to re-send any documentation.

Under the Privacy Act, [NEW REP]'s office will require a new Privacy Act Release Form authorizing them to make inquiries on your behalf with [AGENCY]. I have attached their office's form; please return it by email or mail to [NEW OFFICE] as quickly as possible.

Please let me or [NEW CASEWORKER] know if you have any questions about this transition. It has been my pleasure to work with you to resolve your case with [AGENCY], and I wish you all the best going forward.

Sincerely,
[CASEWORKER]

Customizing this letter:

As noted above, we’d recommend starting the conversation about redistricting with a phone call, especially for constituents who have been on your books for a long time. However, depending on your caseload and the constituent’s communication preferences, you stick to email or mail.

Make sure to clear providing direct contact information with the constituent’s new caseworker before sending out. If you are handing the case off to a freshman office, you may not have this information until some weeks into the new Congress.
Optional: Redistricting explainer

Curious about why this transition is happening?

There are two processes at play: reapportionment and redistricting. Reapportionment is the process of dividing the 435 available seats in the US House of Representatives among the states. House seats are assigned to states based on state population following the US Census every ten years, but the states themselves are in charge of drawing the boundaries of individual Congressional districts—or redistricting. This can be a minor boundary adjustment to maintain equal populations, or a more dramatic change, particularly when states gain or lose seats in Congress based on population changes. [CUSTOMIZE TO EXPLAIN YOUR DISTRICT’S BOUNDARY CHANGES].

House Ethics rules dictate that in the vast majority of cases, Members should not use their office’s resources on behalf of people who are not their constituents. This means that when a constituent’s Member changes due to redistricting, their original Member will transfer any open casework for that constituent to their new Representative.

If you’d like to learn more about redistricting, you can browse this introductory explainer from Ballotpedia, a more in-depth look at redistricting from the Congressional Research Service, or [INSERT NONPARTISAN ARTICLE ON YOUR STATE’S REDISTRICTING].

Using this section:

We know that some constituents have more interest in understanding the details of their cases than others, and being transferred in redistricting is no different. As always, you know your constituents best: if you think your constituents may be confused by this information, please leave it out, or customize it to reflect your state’s specific situation.

However, if you think a constituent may appreciate the additional information, or a constituent asks questions about redistricting, we have provided this information as a template for an email reply, an additional form letter, or a section on your website. See the next pages for additional FAQ information.
RESOURCES

Onboarding introduction + PARF reminder

Dear [CONSTITUENT],

I hope this finds you well. As [FMR CASEWORKER] discussed with you, after the recent redistricting process in our state, your area is now represented in Congress by [YOUR REP]. I am part of the team handling constituent services for this district, and will be your point of contact going forward. It is a pleasure to meet you, and I look forward to working with you to resolve your case with [AGENCY].

I have been fully briefed on your case and the work to date to resolve it by [FMR CASEWORKER], but please let me know if it would be helpful for us to schedule a time to go over any additional details. As [s/he] mentioned, to move forward, I will need a signed copy of our office’s Privacy Act Release Form specifically authorizing our office to make inquiries on your behalf. I have re-attached a copy of that form to this email; it is also available on our website at [ADDRESS], or we will be happy to mail you a hard copy.

Please do not hesitate to contact me if you have any question or concerns. I am reachable at this email or at our office at [NUMBER, HOURS]. I look forward to working with you.

Sincerely,

[CASEWORKER]

Agency introduction + new PARF

Dear [AGENCY CONTACT],

As [FMR CASEWORKER] may have mentioned, due to this year’s redistricting process, [CONSTITUENT] is now represented by [YOUR REP]. Please find attached a signed Privacy Act Release Form from this constituent for our office, and I would appreciate it if you would direct future correspondence on this case to me. The best way to reach me is [PHONE/EMAIL INFO].

[FMR CASEWORKER] has briefed me on the status of this case and your correspondence to date; If you have any additional information that would be helpful for me to review on this case, I would be very happy to discuss that as well.

[Inquiry on the case status or other questions on the case].

Please do not hesitate to contact me if you have any questions or concerns. I look forward to working with you to resolve this matter.

Regards,

[CASEWORKER]

This email sets the tone for your relationship with this new case. Make sure that it reflects your preferences for communication, and how much time you can spend with each new case.
FAQ for constituents

Why has my Member changed?
There are two processes at play: reapportionment and redistricting.

Reapportionment is the process of dividing the 435 available seats in the US House of Representatives among the states. House seats are assigned to states based on state population following the US Census every ten years, but the states themselves are in charge of drawing the boundaries of individual Congressional districts—or redistricting. This can be a minor boundary adjustment to maintain equal populations, or a more dramatic change, particularly when states gain or lose seats in Congress based on population changes.

If you’d like to learn more about redistricting, you can browse this introductory explainer from Ballotpedia, a more in-depth look at redistricting from the Congressional Research Service, or [INSERT NONPARTISAN ARTICLE ON YOUR STATE’S REDISTRICTING].

Why can’t your office keep working on my case?
House Ethics rules dictate that in the vast majority of cases, Members should not use their office’s resources on behalf of people who are not their constituents. This means that unfortunately, if you are no longer in our district, we cannot continue working on your case. However, please know that our team will do everything we can prepare your new caseworker to continue our work and resolve your issue as quickly and favorably as possible.

I didn’t vote for [new Member]—will they still take my case?
Yes! For most Congressional offices, caseworkers or constituent services representatives take a lot of pride in providing excellent constituent services to all of their constituents, no matter their political affiliation. Most official offices (i.e. not campaign offices) will also have no way of telling who you voted for.

Can I opt out of having my information shared with [new Member]?
Legally, this decision is solely made by your Member of Congress [optional: explain your member’s decision on transferring cases]. However, as a courtesy, our team may work with you to close out your case if you’d prefer. If you have a strong preference, please alert our team by [SET YOUR DEADLINE] and we’ll be happy to discuss options with you.

Do I have any other alternatives besides [new Member]?
We have every confidence that staff in any Congressional office will be professional and dedicated to serving their constituents. However, if you have significant reservations about working with your new Representative, our team can also connect you to either of your Senators. Please give us a call to talk through your concerns and options.