



# **Inside Oversight: Levin Center at Wayne Law Tutorials**

## **SERIES 5 OVERSIGHT GENERALLY**

### **Tutorial: Working with an Agency Liaison**

In this video, Levin Center experts offer tips and advice on how to work with a federal agency liaison in a Congressional investigation.

#### **Instructors**

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U.S. Senate Permanent Subcommittee on Investigations

#### **Transcript**

Zack: Hi. I'm Zack Schram, and this is Elise Bean, and we're here to share with you some tips we've learned over the years on how to work with federal agency liaisons to advance your investigations. Both of us conducted oversight investigations for Senator Carl Levin on the Permanent Subcommittee on Investigations in the United States Senate.

Elise: Most federal agencies have designated personnel whose sole responsibility is to work with Congress. Those Congressional liaisons typically work on legislation, appropriations, nominations, hearings, and – our special focus – oversight investigations. In this segment, we'd like to offer you some tips on how to work effectively with an agency liaison on an oversight inquiry.

#### **Establish a relationship.**

Zack: Tip Number One: Establish a personal relationship with the Congressional liaison at each agency of interest. The Congressional Research Service maintains a list of agency liaisons which you can use to identify the relevant agencies and individuals. You can introduce yourself by telephone or email or, better yet, schedule an in-person meeting. Try to get to know the liaison before an investigation begins, so there's no pressure. A pre-existing relationship will then make it easier to work with the liaison when an investigation starts.

### **Learn the liaison's background.**

Elise: Tip Number Two: Learn the liaison's background. You can try looking up their work experience online, using a service like LinkedIn, or search for a biography on the agency's website. Some liaisons stay in their jobs for years, while others are relatively new, so it's good to learn how long they've been at the agency and if they have a specialty. You can also ask colleagues about a liaison's character and work style. When you meet a liaison in person, you can further explore their work experience and outlook. Knowing a liaison's background will help you deal with them more effectively.

### **Work to maintain a positive relationship.**

Zack: Tip Number Three: Work to maintain a positive relationship with your agency liaisons. Because liaisons can save you time and effort, or make your life more difficult, it is worth taking the time to build good working relationships. That includes treating each liaison with respect and civility, giving them a heads up when appropriate, and giving them an opportunity to respond to critics or complaints. A positive working relationship will pay huge dividends over time.

### **Consult with liaisons about possible investigative topics.**

Elise: Tip Number Four: When you are designing a new investigation, you may want to consult with the relevant agency liaisons about possible topics or approaches. Liaisons typically have a lot of information about their agencies' challenges, past inquiries, and reforms, and may be able to suggest worthwhile topics or explain the ins and outs of particular issues. Agency liaisons can help save you from re-inventing the wheel or chasing dead ends.

### **Use liaisons to advance your fact-finding.**

Zack: Tip Number Five: If an investigation is underway, you can and should use agency liaisons to advance your fact-finding. You can ask a liaison to identify agency experts and set up briefings with them. If you are considering a document request, you can ask the liaison for information about the types of documents at the agency and copies of key reports. If you've made a document request, the liaison

may be in charge of the document collection process and can provide status updates. If you are considering interviews, the liaison may be able to suggest relevant agency personnel and manage the scheduling process. An agency liaison can facilitate your document production and interviews or, instead, slow them down. A good working relationship can help make the difference.

### **Seek liaison help to ensure an accurate report.**

Elise: Tip Number Six: If you are writing a report, you may want to use relevant agency liaisons to help ensure its accuracy. You can ask a liaison to get information needed for the report or connect you to agency personnel with expertise. You can ask a liaison to review, or get an agency expert to review, draft report sections to ensure the information is correct. You can also ask for help in citing sources for a footnote. Again, liaisons can assist or impede your efforts, depending upon whether you're on good terms.

### **Use the liaison to facilitate hearing arrangements.**

Zack: Tip Number Seven: If you are working on a hearing, you will likely have to rely on agency liaisons to facilitate the hearing arrangements. Liaisons often play a critical role in securing an agency's agreement to appear at the hearing and supply an appropriate witness. Liaisons may help draft agency testimony and can get testimony clearance from the Office of Management and Budget. Liaisons are also often the key intermediary in conveying to more senior agency personnel your boss' hearing expectations and goals. In addition, they may lead the agency's efforts to respond to post-hearing questions for the record. A good working relationship with the liaison will facilitate all of that work.

### **Enlist the liaison in policy reforms.**

Elise: Tip Number Eight: You may also want to enlist agency liaisons in your efforts to achieve policy reforms. You can ask liaisons to help identify possible reforms or provide agency reactions to reform proposals. You can also work with liaisons to set up meetings, track agency actions, and ensure policy changes actually happen.

### **If a liaison isn't working out, talk to a higher up.**

Zack: Our final tip: If a particular agency liaison isn't being helpful, consider speaking with a more senior agency official. You may be able to convey your concerns, resolve problems, or even switch to a different liaison. Taking that course of action should be a last resort, however; some agency liaisons work in the

federal bureaucracy for years and won't soon forget your going over their head to their boss.

Elise: Agency liaisons can help or hurt your investigation. We hope these tips will help you work effectively with those key agency representatives.

### **Working with an Agency Liaison**

- 1. Establish a relationship.**
- 2. Learn the liaison's background.**
- 3. Work to maintain a positive relationship.**
- 4. Consult with liaisons about investigative topics.**
- 5. Use liaisons to advance your fact-finding.**
- 6. Seek liaison help to ensure an accurate report.**
- 7. Use liaisons to facilitate hearing arrangements.**
- 8. Enlist agency liaisons in policy reforms.**
- 9. If a liaison isn't working out, talk to a higher up.**

Elise: Thanks for joining us.

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