

## Academic–Practitioner Exchange: Planning an Effective Presidential Transition in 2008–2009

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## Recommendations for an Effective 2008 Transition

*In response to Martha Joynt Kumar's essay on maximizing presidential transitions while minimizing hazards, this essay presents additional practical recommendations, framed within the context of the upcoming presidential transition.*

This is to lay out my personal thoughts and recommendations regarding the upcoming presidential transition of 2008, based on my experience as the executive director of the presidential transition of 2000, the research I did to prepare for that assignment, and the resources I know this next administration will inherit.

### General

- Six months or so before the election, designate someone to, at a minimum, plan the transition and, preferably, prepare to be the executive director or chief operating officer of the transition. Don't worry about jinxing the campaign or being too presumptuous: It is irresponsible for anybody who could be president not to prepare to govern effectively from day one.
  - Set specific goals for the transition and assign specific people to be responsible for the accomplishment of each. Without goals to drive the preparation to govern, the transition period will be spent responding to the tremendous inflow of advice, job seekers, volunteers, well-wishers, and press inquiries. I suggest the following generic transition goals for whomever is elected president:
    - Clearly communicate that you are aggressively preparing to govern, that you are operating without hubris or triumphant partisanship, that you are experienced and not a neophyte, that you are ethical, and that you understand the president-elect is not the president until noon on January 20.
    - Select the senior White House staff and choose an organizational structure and decision-making process by mid-December.
    - Select the cabinet members by Christmas and have them briefed and ready for confirmation
- hearings by about January 10, a timetable that has been met by prior administrations. The Senate will be anxious to hold hearings even before the new president is sworn in so that the new cabinet members can be confirmed within a day or two of the inauguration.
- Summarize the new administration's priorities for each cabinet department and the primary issues, facts, and campaign promises related to each. It is important to prepare each secretary-designee to be the new president's secretary versus merely the secretary.
  - Prepare to proactively reach out to Congress, supporters, trade associations, well-wishers, and job seekers in order to show your interest in them and to connect with them in the way you choose to do so and according to your timetable. Work especially to establish a strong working relationship with the congressional leadership.
  - Develop a preliminary 20-day, 100-day, and 180-day schedule for the new president to guide the initial focus for his or her energies and time.
  - Prepare to present the new administration's proposed budget by early February, when the fiscal year 2010 budget is to be presented to Congress.
  - Review the executive orders and regulatory issues requiring immediate attention from the new administration.
- Plan on the transition costing at least \$9 million (2000 dollars), which is what the 1992 and 2000 transitions each cost. Have a campaign fund-raising group ready to field a direct mail solicitation shortly after the election for the difference between the forecasted costs and what the General Services Administration provides.
  - Count on needing to organize at least 800 people at the peak of the transition. The Ronald Reagan and Bill Clinton transitions each used more than 1,000 people, but many of these extra people were needed to do work such as data entry and correspondence that can be done more efficiently today

with the help of technology and the Internet. The majority of these people can be volunteers, as there will be plenty of people available to provide general support, and congressional staffers, who will be in fall recess, to work on policy and governance matters.

- It is a good idea to use private transition monies to pay for temporary housing for transition workers and to provide some relocation assistance. For legal reasons, all of this support must be provided and paid out before the inauguration. In 2000, senior White House staff-to-be were given the estimated cost of their physical move, while all other staff members relocating to Washington, DC, from the campaign or governor's office were given \$1,000 each.

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senior people with established credibility to actively seek input, and set up a system for ensuring timely responses to congressional recommendations and questions.

### Assemble the New Administration's Team

- Select someone to be in charge of presidential personnel at least six months before the election, if at all possible. Have him or her confer with appropriate subject-matter principals and policy people, and use the generic position description materials compiled by the PPO to reach preliminary conclusions about the type of person the president-elect should be seeking for each cabinet position. When conferring with subject-matter

principals, solicit suggestions about who should be considered for each senior position. Then, initial discussions about cabinet member and senior subcabinet selections can be substantive and goal oriented, and not just about who did what during the campaign. A significant challenge in assembling any new administration's team is balancing the need to select the best people to do the work ahead with the natural desire to reward key people who helped get the new president elected.

- Begin early enough before the election, plan and organize, assemble the necessary resources, and make it a high priority to put in place the 100 or so most important cabinet and subcabinet personnel by about April 1. Every administration might prioritize the positions differently, but everyone agrees that it will be very important for this next administration to work with the Senate to put into place as quickly as possible the key national and homeland security subcabinet.

- No previous administration has had confirmed more than about 25 cabinet and subcabinet personnel by April 1—therefore, this goal is a significant challenge. The PPO is currently defining the resources, timetable, and organization that it believes the new administration will have to employ to help the new president select these 100 people in time to get them cleared and confirmed by the Senate by April 1. In addition, White House counsel, the PPO, and the Office of Management and Budget (OMB) are working to significantly expedite the clearance process to make it possible to accomplish that goal. These same offices are working with the Senate to get them the information on the nominees they need to accomplish the goal.

- Along these same lines, the new administration should set as its goal to have the entire cabinet and subcabinet, which is about 400 people, working by the August recess. No previous administration has had more than about 240 cabinet and subcabinet personnel confirmed by this date.

### Manage the "Incoming"

- Expect a large number of job seekers, at least 40,000 in the first few weeks and at least 75,000 in the first few months. Make an online application available on a transition Web site so that applicants can apply directly (and, by the way, do their own data entry). I suggest the transition incorporate into its Web site the functional online application currently used by the Office of Presidential Personnel (PPO), as is or with modifications, or formally decide months before the election that it wants to develop its own.

- Also use the transition Web site to help potential applicants understand the reality of public service and that it is not for everyone: The pay is low and the hours are long, divestiture of assets is often called for, there are postemployment and lobbying restrictions, and there is a lot of public and congressional scrutiny.

- Expect a lot of advice from members of previous administrations, "experts," interest groups, lobbyists, governors, legislators, donors, and the like. Organize to receive this information: "Partner" with them, but in such a way as not to be consumed by the partnership. Designate separate people to serve as contact points for governors, donors, and members of Congress.

- Send separate communiqués to governors, mayors, members of Congress, donors, and supporters to tell them how best to communicate with the transition team. Differentiate between how they can apply for a position, recommend someone for a position, provide input, and volunteer.

- Be proactive in connecting with Congress. Members from the president-elect's party, in particular, will want to know whether the new administration intends do it "with them" or "to them." Designate

- Make every effort to designate senior White House staff by January 1 so that they can get comfortable working together and managing the president-elect's schedule in the weeks leading up to the inauguration, as they will manage it after he or she takes the oath of office. These staffers also need to be in position to provide guidance and counsel to the new cabinet secretaries. The new president's chief of staff is the best person to lead this effort, separate from but in coordination with the effort to identify the cabinet and subcabinet positions.
- Have early conversations with secretary-designees about the collaborative nature of the subcabinet selection process. Some presidents have allowed their secretaries to select their own subcabinets, whereas other presidents have mandated who would serve in each secretary's subcabinet. It is important that each appointee is loyal to the president, knows that the president selected him or her, and is someone the secretary can work with. Therefore, the recommended but more challenging approach to subcabinet selection is for presidential personnel and the secretaries to collaborate—both have to agree on who should be recommended to the president.

### Prepare the New Team to Govern

- Focus on getting the new secretary-designees off to an informed, confident start. Provide them with basic briefing material on the department, the president-elect's campaign promises in their subject area, staff to support them during the confirmation process (a chief shepherd who has helped previous nominees get confirmed, a public affairs person, a presidential personnel contact, and a cabinet affairs person), a lot of contact information, and temporary office space (preferably so that all the secretary-designees can be near and get to know each other).
- Use small teams of five or so people to interact with department personnel to put together focused briefing books for the secretaries-to-be. Minimize potential conflicts of interest in interacting with the departments and maximize the quality of the briefing material. Therefore, exclude lobbyists and overt

job seekers from these teams, but assemble them and other "experts" into advisory groups for each new secretary and allow them to submit individual but not group recommendations on any issue they desire to comment on.

- Designate a small team to work with the OMB to ensure that the fiscal year 2010 budget reflects the new administration's priorities. The OMB is very experienced at working with budget-knowledgeable representatives of new administrations to accomplish their budget-related goals in the two months or so they have to work together.
- Designate a few people to research all current executive orders to determine whether there are any that the new president wants to rescind or replace with orders of his or her own to define new courses of action right away.

A presidential transition is very, very intense and full of conflicting emotions and pressures.

- The candidates naturally want to wait until after the election to prepare to govern, but it is irresponsible to do so.
- The president-elect's staff and advisors want to celebrate and recover from the grueling campaign, but they can't—the new administration only has about 75 days to prepare to govern and deliver what they said they would if elected.
- The president-elect's staff and advisors have been focusing on the more than half of the people they needed to vote for their candidate, but now they need to focus on the entire populace they have been elected to serve.
- The president-elect's natural desire is to reward key people who helped get him or her elected, but the focus really needs to be on selecting the best people to do the governing work ahead.

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Every candidate must prepare to govern, starting months before the conventions when each officially becomes the candidate. And every transition must organize and prepare to focus on what they must get done if they want the president-elect to be well prepared to govern at noon on January 20, 2009.