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Managing presidential transitions: Eight tips for taking care of the team

People are your best asset in a transition. Eight best practices can help you to ensure that your team functions at the highest level during the short transition period.

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Presidential transitions are large, complex, and difficult. Much has been written about how to manage the process. But how do you go about building the full team? How should its members work together? How do you make sure everyone is performing at the highest level? No process works unless the people executing it understand and embrace its objectives. Building and sustaining the right team can help the transition accomplish the formidable task of preparing an administration to govern in about 75 days.

In this article, we share tips and tricks from participants in previous transitions about how to prepare the transition team for success.

1. **Consider the continuity of personnel after the transition period**
   Some transition roles, especially those with clear post-inauguration analogs, benefit from continuity throughout the transition period and into the new administration. For example, when the role of personnel director changed hands after the inauguration, previous transition teams noticed challenges, including duplication of effort in vetting and building slates of officials, as well as a longer ramp-up period. Similarly, putting people on the staff of the agency-review team where they will probably receive a government appointment helps them build relationships with career civil servants and to learn about the agency during the transition period. They can then hit the ground running on day one.

   The exhibit shows typical roles on the transition team and their potential post-inauguration analogs. Leadership teams may want to consider staffing for the roles on the exhibit's right-hand side when they select personnel for the transition team.

2. **Build a transition team that executes collectively**
   For a team to accomplish its tasks in only about 75 days, it needs specific skills and expertise—and must be able to work together quickly and effectively in a rapidly changing environment. Consider the broader team dynamics as you build the post-election transition team:

— a complementary set of skills, experiences, and working styles

Exhibit

Key roles on a pre-inauguration presidential transition team and their post-inauguration analogs.

Potential roles before and after inauguration

Pre-inauguration	Post-inauguration
Operations	White House Office of Management and Administration, Office of Administration in the Executive Office of the President
Personnel and appointments; personnel integration	White House Office of Presidential Personnel
Policy	Domestic, National Security, and Economic councils
Communications	White House Communications and White House Press Office
President-elect support	Office of Scheduling and Advance, Oval Office Operations
Public liaison and intergovernmental affairs	White House Office of Public Engagement and Intergovernmental Affairs
Legislative affairs	White House Office of Legislative Affairs
General counsel	Office of the White House Counsel
Agency review	Executive-branch departments and agencies, White House Office of Cabinet Affairs

- the inclusion of doers who are willing to jump in and execute, in addition to strategists or policy experts (who are rarely in short supply)
- the message that the transition team's composition reflects the values of the new administration and the beliefs that the president-elect articulated during the campaign
- how the team can partner with others in the post-election landscape to handle tasks that do not require the participation of the core transition staff

3. **Consider offering specialized support to senior staff, who have an outsized role in successful transitions**
   At the beginning of a transition period, senior staff (for instance, top campaign personnel and the White House "staff in waiting") are simultaneously ramping up their own roles and beginning to lead teams. The transition team might consider establishing "white glove" processes to ensure that senior staff come onboard smoothly, get the right messages, and receive the support they need to start off well. The elements of such processes could include:

- *Clear plans for when and how the post-election roles of the senior staff are handed out.* This information must also be communicated to the broader transition and campaign teams. For example, people in top positions might receive a call from the executive director on election night and their positions might be announced in all-staff emails (with an organizational chart) on the Monday after Election Day.
- *A formal onboarding and expectation-setting session.* This should clearly outline the parameters and objectives of senior roles (and their associated decision rights) and provide clear guidance on values, expected working norms, and behavior.
- *Clear guidance about the people senior leaders should coordinate with and the mechanisms for coordination.* These are the "who," "when," and "how" issues—for example, senior leaders might be advised to call each member of their teams the day after the election, to meet with the head of personnel every Monday, and to email rather than call the White House chief of staff when they have questions.
- *A clear point-person for integration issues.* If senior staff have questions, they should know exactly who is their first line of defense.

4. **Develop a plan to onboard individual appointees as they are named during the transition**
   Previous transitions faced some challenges integrating senior appointees (for instance, the chief of staff, the White House heads of departments, and Cabinet members) into the transition team. A few principles can help:

- *Set decision-making expectations.* Get early alignment about how much input appointees will have for which decisions, especially policy and personnel ones (for instance, the role they will play in appointments). Cabinet members and the White House not uncommonly have different perspectives on decision making for both senior and junior positions. Setting expectations on operational issues (for instance, who has access to the president-elect and who will have office space during the transition) can help provide clarity, especially for people who have not been involved with the transition before their appointments are announced.
- *Establish processes to engage with transition functions.* Create a standard process for how appointees will engage with each transition function. The deputy head of the transition, for example, might send an email connecting the leader of the agency-review team with new appointees to set up a one-hour meeting within 12 hours of their appointment.
- *Overcommunicate the "rules of the road."* Establish and communicate a consistent set of external-communication guidelines, ethics regulations, and other rules important for both the confirmation and the transition teams. Appointees must understand these guidelines rapidly and completely.

— *Remember that the top priority for appointees who need confirmation is to be confirmed.* One of the transition team's core objectives is to prepare appointees for confirmation and governance as incoming senior leaders of the administration.

— *Acknowledge the future roles of appointees.* One key responsibility of the transition team is preparing appointees to govern. As their appointments are announced, they should tell the agency-review team what they will need. The transition staff must respond agilely to their requirements.

5. **Be deliberate about timing the onboarding of the transition staff**
Transition staffs for previous administrations expressed frustration over a "hurry up and wait" mentality: their members rushed to Washington, DC, after the election only to find that they had no clear assignments during their first days on the team. Recognize that the campaign staff and transition staff have been working long hours and may need time to relocate or to solve other logistical problems. Although 75 or so days is a tight time frame, team members should not be required to start work until tasks are ready for them to work on. Setting reasonable expectations and being intentional about onboarding time lines make it possible for the staff to be ready for the next sprint.

6. **Have a plan for junior staff**
Junior staff are the heart of transition teams—they often account for most of the team, bring the greatest amount of energy, and work on the tasks that others do not want to do. Junior staff coming from the campaign will probably be excited about potential roles in the administration, but they may also worry about how to pay their bills and keep their health insurance in the interim. Think about how to support these women and men during the transition period. When staffing the team, consider the full post-election universe—the transition, the inaugural committee, and the formal party structures (the Democratic National Committee or the Republican National Committee). No matter where people land during the transition period, create a process to help them apply for roles and express their preferences.

7. **Use one standard process to assign and communicate post-election roles**
Traditionally, the transition-staffing process has been a challenge: requests for positions come in from many directions and are handled informally, so wires sometimes get crossed. Establishing and communicating—up front—a single, uniform process that everyone must use helps avoid this problem. So does a clear plan for when and how appointments will be announced.

8. **Ensure that the staff feels it is heard and can provide feedback**
In 75 or so days, it is easy to overlook feedback mechanisms. But during such a short period of time, formal opportunities for feedback are a quick way to show the staff that it is valued and heard. Establishing and publicizing channels for staff feedback also help to surface small issues before they become big ones that sap morale and lead to staff turnover. These channels might include office hours for senior staff, an ombudsman for confidential feedback, or even an inbox for anonymous comments and questions.

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