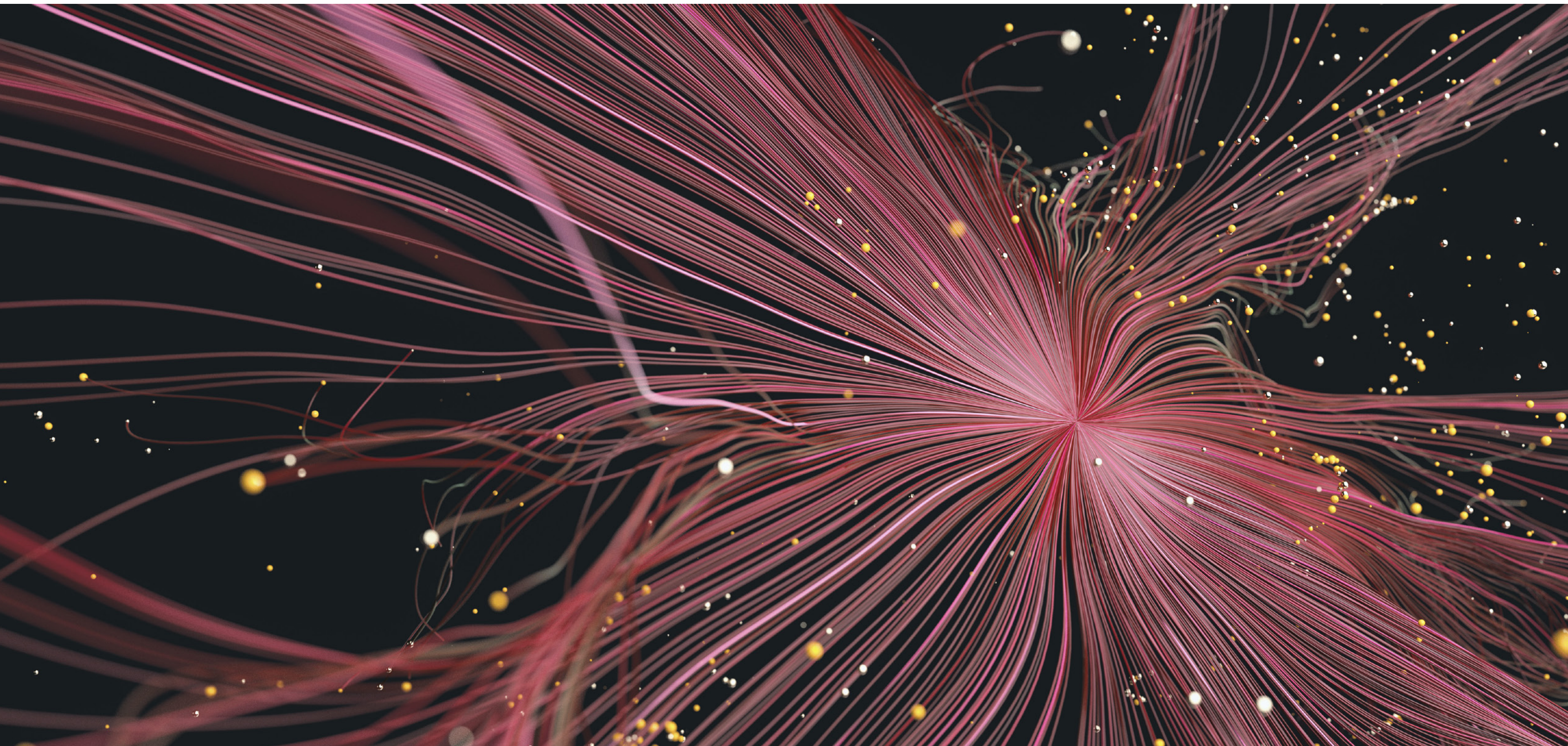
McKinsey & Company

Public and Social Sector Practice

Moving teams from campaign to transition: Five things to get right

How the shift from campaigning to transitioning is managed can set the foundation for an administration.

by Scott Blackburn, Thomas Dohrmann, Adi Kumar, and Catharina Wrede Braden



© Andriy Onufriyenko/Getty Images

November 2020

The approximately 75-day period between the US presidential election and inauguration day is a high-stakes sprint to prepare to govern. Critical to the effectiveness of this transition is the successful overnight merger of two separate entities—the campaign team and the pre-election transition team—into one unified, high-performing, post-election transition team. As the team directly supporting the president-elect, it helps define a clear direction, align the troops, and set the right tone for a successful administration. Failing to integrate these two teams can lead to duplicative efforts and infighting at best; at worst, it can result in empty cabinet seats, stalled legislation, and national security risk that erodes confidence in the president at home and abroad.

But merging teams well is hard. Until Election Day, these two teams operate independently, with different cultures and networks, in pursuit of distinct goals: the campaign team is focused on victory, and the pre-election transition team is focused on preparing the operational infrastructure required to govern.

Transition leaders can increase the chances of a successful integration by drawing on best practices and lessons learned from previous administrations, as well as from thousands of major corporate mergers.

The following five tasks are most important to get right:

— *Get the right people into the right roles.* Planning early to bring together the right people and skills from the pre-election transition and campaign teams is the foundation of a successful integration.

— *Decide who gets to decide.* Lack of clarity on who makes which decisions is usually a major pain point. When merging two legacy teams, aligning on the chain of command for major decision processes prevents duplication, enables staff to get questions resolved rapidly, and ensures the right people are involved along the way.

— *Set the tone for the team.* The two teams bring strong but separate cultures and networks. Leaders need to rapidly and intentionally establish, communicate, and model expectations to reset and redirect staff toward the goals, values, and norms of the newly merged organization.

— *Invest in starting off right.* Given the tight timeline, quickly aligning the merged top team on objectives, milestones, values, and decision paths is vital to making progress on the highest priorities.

— *Make integration someone's job.* Getting integration right is critical but can often fall through the cracks because it is not an assigned responsibility. Standing up a small team to focus on integration helps smooth the merger of two fast-moving teams.

This paper focuses on integration of the two pre-election teams into a single high-performing post-election team; it does not cover general best practices in post-election transition team operations. The best practices shared here are applicable to both incumbent and newly elected administrations. While this paper is written for US presidential transitions, its principles may be broadly applicable to states and other governments.

Get the right people into the right roles

Rapidly getting people into the right roles ensures the integrated team hits the ground running with strong leadership in place. A successful post-election transition team starts with a clearly defined organizational structure that thoughtfully merges redundant functions and integrates the different skills, expertise, and cultures of the campaign and pre-election transition teams. Three best practices can help support this transition: think about staffing early, well before the election; build deliberately; and create "parking places."

Think about staffing early, well before the election

Deciding in advance of the election who to staff in which roles and when they will start ensures priority positions are filled the day after the election, staffing is conducted with the transition to governing in mind, and people are not brought on only to be left waiting to be assigned tasks. It also sets the foundation for a high-performing, integrated team. Consider the following actions:

— *Identify and staff the highest priority needs* for the post-election transition team, in particular the positions that must be in place the day after the election (for example, core operations staff from the campaign who can help run the transition budget and think through how to hire and pay people).

— *Identify and hire the individuals likely to assume full-time positions in corresponding key roles* (for example, hire likely presidential personnel office [PPO] staff to the transition's personnel team) to ensure a smooth shift to governing and avoid confusion, loss of institutional knowledge, and duplicate work.

— *Prepare offer letters with specific start dates in advance,* for delivery the day after the election, so the right people start immediately and critical staff who are not needed for the first few days can take a brief, well-deserved break.

Build deliberately

Some functions can be "lifted and shifted" from the campaign or pre-election teams, when the function remains nearly the same and skills from the other organization are not essential (for example, the campaign's communications team can convert overnight into the post-election transition team's communications office). For these "lift and shift" teams, the challenge is to be deliberate and thoughtful about how they are connected to other teams, with clear rules and norms, so teams do not operate in silos and perform duplicative or poorly

Transition leaders can increase the chances of a successful integration by drawing on best practices from previous administrations and major corporate mergers.

integrated work. See Appendix A for more detail on establishing effective collaboration.

Other functions benefit from the merging of campaign, pre-election transition, and other personnel. For these mixed teams, careful attention to matching personalities, expertise, and skill sets helps ensure a high-performing team (exhibit).

There may not be a clear pre-election leader for every function or topic requiring post-election coverage. Transition leadership should take special care early to identify these parts of the organization, given that they will require additional up-front investment to make sure roles, ownership, and decision rights are clear.

Three functions in the post-election organization—policy, agency review, and personnel—may also require special consideration in staffing and integration management, given their scale and typical integration challenges (agency review and personnel being two particularly large functions). See Appendix B for best practices for integrating these teams.

Create 'parking places'

The post-election transition team is unlikely to be able to accommodate all personnel who have worked on the campaign and pre-election transition teams, and the sheer number of job seekers can disrupt a smooth integration. When positioning staff, consider the full post-election ecosystem, including the inaugural committee, campaign wind-down team, the Democratic and Republican national committees, and other campaign-affiliated or mission-aligned organizations that can use staff members' skills.[1]

It may make sense to give some staff paid time off to reward their months of hard work rather than create unnecessary roles for them in the transition team.

Establishing and communicating a clear, priority application process (for example, specialized application links) for former campaign and other pre-election staff interested in jobs in the administration reduces short-term staffing pressure and inbound inquiries to the post-election transition team, and it also helps keep teams focused and roles clear.

Decide who gets to decide

Lack of clarity about who makes which decisions is repeatedly cited as the largest problem for transition teams. Pre-election transition and campaign teams have separate and strong personalities, networks, and decision-making norms. Decision making for the post-election team may require a different set of inputs than the campaign or pre-election transition teams have grown used to. In the absence of clear, proactive guidance on decision making, there are four typical failure modes:

— *Unclear chains of command, leading to ad hoc back channeling.* Lacking clear guidance on who makes which decisions, staff revert to informal networks and back channels. This can rapidly result in siloed, scattered decision making and duplicative work; for example, numerous past transition teams have wound up with parallel, competing slates for key positions.

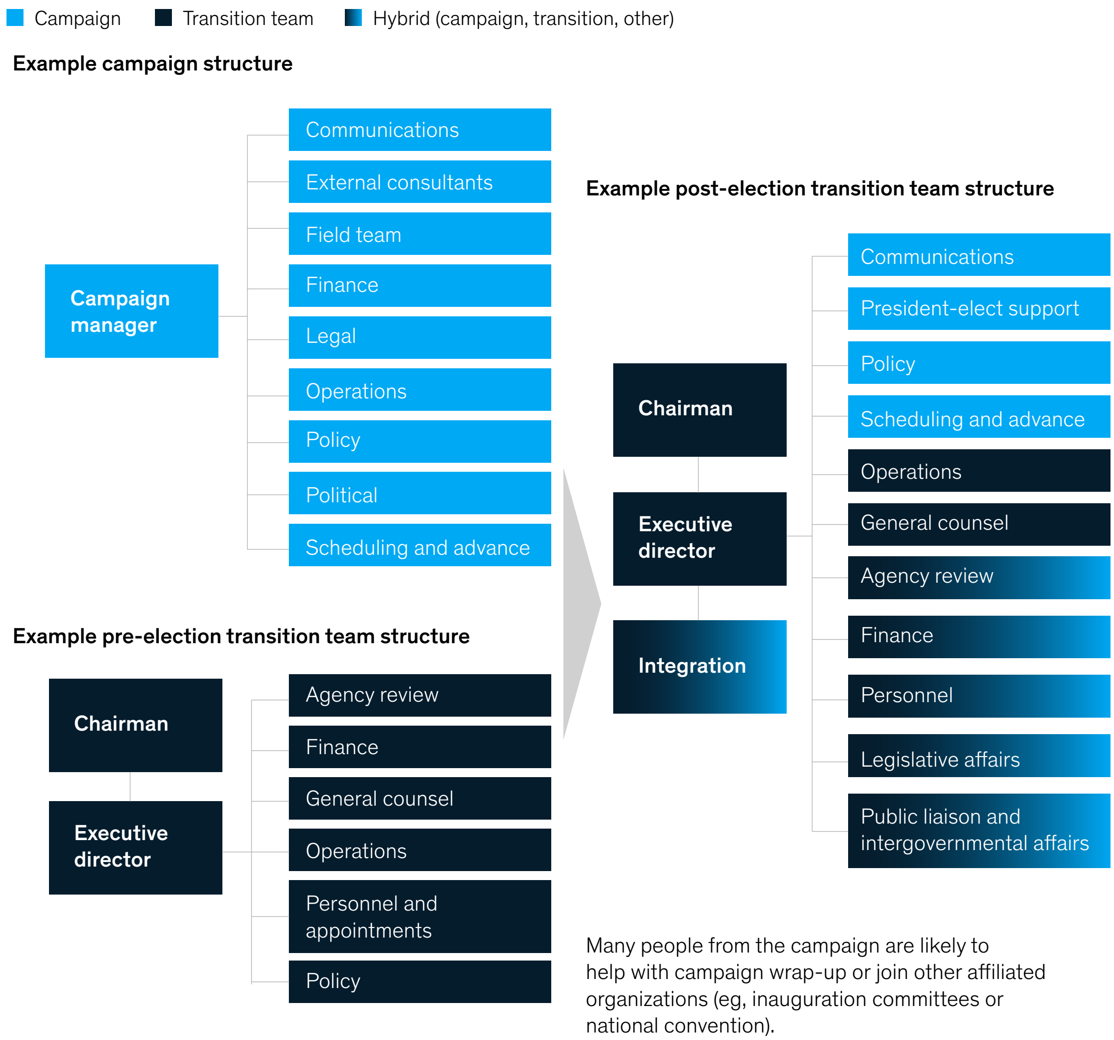
— *Insufficient delegation, leading to top leaders becoming bottlenecks.* Campaigns naturally run with a tight, top-down central team, so the level of delegation necessary to run a transition may feel foreign to campaign leaders. Transition teams that do not embrace delegation will create bottlenecks on key issues that hamper progress. The result: leaders who are too far into the weeds and distracted from broader strategic issues and staff who are disempowered.

— *Too many voices, leading to decision paralysis.* Decision processes that involve too many people will quickly lead to chaotic meetings, slow or halted decision making, and people feeling slighted when not heard.

[1] These could include 501(c)(3), 501(c)(4), or 527 organizations.

Exhibit

There are multiple possibilities for how organizaional charts might merge after election day.



— *Too few important voices, leading to poor or inconsistent decision making.* On the other hand, having too few voices is also a problem. Without well-defined processes, experts who may have critical information can get cut out of the process. Poorly integrated transition teams may bypass key players from a different pre-election team who would have contributed valuable input.

A few best practices can help mitigate these failure modes: develop clear decision processes immediately, develop clear decision rights for each key role, communicate formal decision rights and processes, and enforce those rights and processes.

Develop clear decision processes immediately—ideally, pre-election—for the most critical, challenging areas
Three areas in particular benefit from clear decision-making processes:

1. Making appointments (for example, how a slate gets assembled)

2. Developing policy (for example, the legislation in the 100-day plan)

3. Producing external communications (for example, how the team will announce personnel decisions)

Getting decision making right in these three areas is so important that stopping to articulate, codify, and distribute the processes associated with these decisions will likely pay off for even the most time-strapped team.

A step-by-step process map helps clarify and communicate major decision paths for these critical decisions. For each major decision set, consider the following questions:

— What is the scope of this decision process (for example, what level of seniority is required for personnel decisions)?

— What are the steps to getting a decision made? Which steps can be done in parallel and which must be done in sequence?

— At each step, which individuals are involved, and are they consulted, informed, or responsible for the decision?

— Who is the one individual ultimately accountable for each decision?

— Once made, how will this decision be communicated internally to the transition team?

— Who has the authority to speak externally about this decision? How will they communicate it (if at all)?

It is helpful to address these questions before Election Day so that decision processes can be shared with the leadership team soon after the election.

Develop clear decision rights for each key role, ideally pre-election
Top transition leaders should have a strong understanding of which decisions they own and—of equal importance—do not own. Leaders should also have clarity on where and how they provide input and on which decisions they do not have final say. A nonexhaustive starter list in Appendix C offers key questions that transition leaders should align on and communicate as early as possible.

Communicate formal decision rights and processes
Decision-making rights and processes are useful only to the extent that everyone knows what they are. Clear decision rights and processes should be disseminated from the top (that is, the president-elect should establish and convey the most important ones) and frequently reinforced through various channels (for example, highlighted during orientation and referred to at meetings).

Consistent overcommunication of supporting process points can also help rein in extraneous voices and forestall the development of informal decision channels. For example, consider the following types of decisions and processes:

— *Who has what role in decision making.* For example, “Person X is leading the meetings, determining agenda items, and collecting input, but Person Y will have ultimate decision rights.”

— *Where the team is in the decision-making process.* For example, “This is an initial brainstorming session to help create a proposal that we will bring to the final decision maker next Tuesday.”

— *What kind of input is needed.* For example, "We have already decided issue A, and today we want your input on issue B only, with the assumption that legislation C will pass."

— *How input will be considered.* For example, "This is one of two roundtables we will host to gather expert opinions," or "This decision should not go further than the seven people in this room."

— *How many people per department should join a meeting.* For example, "To keep meetings to a manageable size while still having broad representation, each department should designate one senior point of contact, who will attend weekly meetings and later debrief his or her department."

Enforce decision rights and processes
When agreed-upon decision processes are not followed up front, individuals quickly fall back on informal and ad hoc channels. It is important that leaders immediately and directly address violations, even if well-meaning or inadvertent, to maintain discipline and set an example. For exceptional instances in which the team needs to respond to unanticipated urgent situations (for example, junior staff identifies the need for chief of staff to weigh in on an unexpected personnel issue quickly to meet a Hill deadline), clear escalation paths should be established to maintain agility.

Set the tone for the team

Cultural differences are one of the most frequently cited reasons that mergers fail in corporate America, and this hurdle can be equally challenging for the merger of pre-election transition and campaign teams.

Prior to the election, the large campaign apparatus operated in a fast-paced, entrepreneurial environment where a clear hierarchy enabled rapid redirection and redeployment toward changing mandates. Conversely, the small pre-election transition team operated in a private, focused manner, with clear direction on its mandate.

Prioritizing a shared culture up front can help prevent many organizational issues, including competing power centers based on pre-election roles. Consider which cultural elements of the campaign have led to its success and how they can be embedded into the transition in the pre-election period to ensure they persevere as transition-period activities pick up speed. Setting the right tone involves defining and communicating a set of simple core values for the transition team, setting and communicating unified leadership norms, concretely signaling that two teams are merged into one, and celebrating the team regularly.

Define and communicate a set of simple transition team core values
Core values help set expectations and foster a shared team identity. These values—perhaps three to five in number—should come from the very top of the organization, reflect the beliefs and character of the president-elect, and be continuously reinforced by leadership behavior. They should be simple enough, and communicated frequently enough, to help guide transition team members in how they should act during a fast-paced and often hectic time—for example, "Core focus on the mission," "One team," "Assume positive intent."

Set and communicate unified leadership norms
While values guide staff behavior, norms guide leadership behavior. Leaders from the pre-election transition team and the campaign team should quickly agree upon these norms and model them to embody an effective, united team. Examples of norms include the following:

— *Show solidarity* by keeping disagreements behind closed doors once a decision is made.

— *Follow the (important) processes* to keep moving quickly and effectively.

— *Run efficient meetings* that are focused on decision making, and speak up if meetings do not seem valuable.

Celebrate the team regularly

Most transition work occurs behind the scenes and can feel thankless. Celebrations re-energize the team and build a sense of community in a fast-moving environment. Carve out time for a few all-staff celebrations tied to key milestones where pre-election staff members can commemorate their achievements together. These events do not need to be lengthy, but they can serve as protected time to reflect on established values, formally acknowledge the work of individuals at all levels, and create memorable moments (for example, a direct thank you from the president-elect or chief of staff, or invitations to inauguration events). Additionally, regular microcelebrations of key outcomes (for example, completion of deliverables such as submitting agency review reports or distributing ID cards) can serve to thank and motivate staff who went the extra mile.

Invest in starting off right

Aligning top leaders on core transition objectives, milestones, and ways of working within the first 72 hours after the election is essential to building a high-performing transition. This is especially true in fast-paced environments where misunderstandings and ambiguity can easily snowball. Too often, teams in high-pressure situations are so focused on jumping into execution that they forget to stop and get everyone driving toward the same goals.

Immediately after the election, the top team—perhaps five to 15 senior leaders from the pre-election campaign and transition teams—could host a major kickoff meeting. This meeting's goals are threefold: align the team on common objectives, high-priority tasks, and timelines; outline individual responsibilities, major processes, and decision rights; and lay out norms and expectations. Top leaders have an outsized impact on the organization, and it is particularly important to get alignment up front to help provide the entire organization with clear and consistent guidance.

Key agenda items for this initial transition team kickoff meeting could include the following:

— *Confirm overall objectives and near-term priorities.* Review key priorities for the transition period and their expected results (for example, announcing X nomination by Y date).

— *Confirm the activities required to achieve priorities.* Outline major transition activities and milestones to accomplish the key priorities, including owners of tasks and deliverables, target timelines, how progress against these milestones will be tracked, and how transition leaders should expect to interact with this tracker. Transition leaders should have the opportunity to ask clarifying questions, pressure test milestones and timelines, and determine how they will need to coordinate.

— *Determine the rules of the road.* Set decision processes for key issues, including who will decide on key roles, and establish leadership norms for the top team (for example, how to communicate with staff when leadership does not agree or how to handle conflict among the leadership team). Propose principles for how appointees should integrate with the team as they are named (see sidebar, "Take extra care to integrate senior staff") and how external communications will be managed.

— *Agree on the desired culture and ways of working.* Discuss desired culture, values, and working norms for the post-election transition team; assess whether and how the current culture of the campaign and pre-election transition needs to change; and—most important—reinforce the leadership team's role in modeling those values and working norms and encouraging those values and norms on their teams.

— *Make a plan to engage the staff.* Set up time for staff to get to know one another (for example, virtual dinners or cocktails during the first week, or a gathering during the first weekend after the election) hosted by leadership, where leaders will discuss and model cultural norms.

Make integration someone's job

Because smooth integration is essential to the success of the transition team, it should have a clear organizational owner. Traditionally, managing integration moves quickly to the bottom of to-do lists, given competing priorities. Consider appointing a dedicated integration lead, supported by two to three junior staff, who will be responsible for the previous four items—getting the right people in the right roles, deciding who decides, setting the tone, and investing in starting off right—and other critical integration areas, including the following actions:

— *Identify and resolve key internal issues to ensure emerging challenges do not balloon into larger problems.* This could include flagging differences in expectations, operations, and culture between the campaign team and the pre-election transition team, as well as identifying actions to address challenges (for example, helping determine who is accountable

Take extra care to integrate senior staff

Senior staff play an outsize role in a successful integration. Leaders might consider establishing "white glove" processes to ensure senior staff are onboarded smoothly and start off right. Elements could include the following:

— *Outline clear plans for when and how senior staff announce post-election roles.* These plans should be shared with them and with the broader team (for example, that they will receive a call from the executive director on election night and have their position announced in an all-staff email with an organizational chart the Monday after Election Day).

— *Host a formal onboarding and expectation-setting session.* This session should clearly outline the parameters of the role and associated decision rights (see Appendix C for more information about decision rights). The session should also lay out clear guidance on values, expected working norms, and behavior.

— *Offer clear guidance on who they should coordinate with and the mechanisms for that coordination.* This guidance should encompass the who, when, and how—for example, meet with the head of personnel every Monday; email but do not call the White House chief of staff; make calls to each member of their team the day after the election.

— *Designate a point person for any integration issues that arise.* This could potentially be the integration lead.

This additional level of care in codifying and standardizing processes can help ensure that senior staff have the right information, feel heard, and start off right.

Considerations for integrating senior appointees

Transition teams often face challenges in effectively integrating senior appointees such as the chief of staff, White House heads of department, and cabinet members as they are identified through the transition period. A formal process for integrating them can be helpful, as can having transition leaders agree on and communicate the following principles early on:

— *Acknowledge their future role.* Many senior appointees will, in practice, assume the ability to direct transition staff. For example, the newly named White House chief of staff often acts as the senior-most transition official (outside of the president-elect and vice president-elect). If the newly named White House communications director or the newly named White House presidential personnel office director are not the heads of those functions on the transition, those functions are often most effective if they respond to the needs of the newly named heads of the White House offices. Similarly, it can be helpful for cabinet nominees, when named, to leverage and provide guidance to agency review teams. The transition staff can act as an

Take extra care to integrate senior staff (continued)

organization-in-waiting for the top brass to whom they will report or deliver.

— *Remember that for appointees needing confirmation, their top priority is just that.* One of the transition team's core objectives is to prepare appointees for confirmation and governance as incoming senior leaders of the administration.

— *Set decision-making expectations.* Get early alignment on the level of input appointees will have on specific decisions, especially regarding policy and personnel (for example, what role they will play in appointments). It is not uncommon for cabinet secretaries and the White House to have differing perspectives on decision making for both senior and junior personnel positions. Set expectations about operational issues such as access to the president-elect and office space during the transition.

— *Establish processes to engage with transition functions.* Create a standard process for how appointees will engage with each transition function (for example, that within 12 hours of appointment, the deputy head of transition will send an email connecting the agency review team lead and new nominee to set up a one-hour meeting).

— *Overcommunicate the rules of the road.* Establish and communicate a consistent set of external communication guidelines, ethics regulations, and other rules key to both confirmation and transition-team operations that appointees need to rapidly and fully understand.

for areas of overlap for issues that fall between or outside of the mandate of functional teams).

— *Oversee internal communications to help ensure staff are informed of leadership priorities and can align their work to the highest-value priorities.* The integration lead would also ensure that key messages are cascaded and understood throughout the organization.

— *Care for staff by providing an avenue for staff questions, standardizing processes that apply to all staff, and resolving areas of confusion.* As one example, the integration lead could support the creation of a single internal staffing process and serve as the point person for staffing questions.

With a broad mandate and oversight of the office, the integration lead could be senior enough to report directly to the executive director. The integration lead could also work closely with the heads of each functional team, especially personnel and operations, as well as the executive director's right-hand person for project management. The person selected should be respected and trusted by leadership on both the pre-election transition and the campaign teams and looked up to by junior staff, as well as have a high emotional intelligence and their finger on the pulse of the entire pre-transition apparatus (transition, campaign, and party committee). The lead should be in place and at work before Election Day.

The integration lead could be supported by a small junior staff:

— One to two people can support tasks related to caring for junior staff. These individuals should have worked on the campaign and know staff well, be empathetic, and be good problem solvers. They will need to liaise with the campaign wind-down team inaugural committee, and transition personnel and operations teams.

— One to two people can assist with identifying and resolving issues and preparing internal communications. These individuals should be experienced project managers and have strong writing skills.

The success of the overnight merger of the campaign and pre-election transition teams has a substantial impact on the administration's efficacy. To effectively set the stage for how the president-elect will govern, the transition team needs to be thoughtful and intentional about which people belong in which roles, who gets to decide what, what kind of unifying culture is being built, and what the team is aiming to accomplish.

Setting up a formalized function to care for the people and the issues critical to a strong integration process can create an orderly, disciplined approach that increases the odds that the transition team will get these things right. If done correctly, the integration sets a firm foundation that ensures newly elected leaders are ready to govern.

Scott Blackburn and **Adi Kumar** are partners in McKinsey's Washington, DC, office where **Thomas Dohrmann** is a senior partner; **Catharina Wrede Braden** is a partner in the Washington, DC, office and leads the firm's North America public sector strategy and risk group.

The authors wish to thank Kerry Kraemer, Sarah Lu, Amanda Patarino, and Andrea Vidler for their contributions to this article.

Appendix A: Getting teams to talk to one another

The complexity and short time frame of the post-election transition requires thoughtful cross-functional collaboration to ensure alignment and avoid internal contradictions. Taking the time to develop a few formal processes can help ensure certain functions collaborate well.

Agency review is typically the largest component of the transition team. Establishing effective collaboration between agency review teams and other functions requires dedicated attention, as mishandling coordination between these teams can be a major driver of duplicative work and dysfunction (exhibit). Certain interdependent agency review relationships have been consistently highlighted as needing more effective collaboration.

Exhibit

Effective collaboration among interdependent agency review teams can prevent duplicate work or dysfunction.

	Description	Example mechanisms
Agency-to-agency review	Interdependent agency review teams should coordinate on overlapping policy implementation issues (eg, Departments of Homeland Security and State coordinating on visa or immigration policy).	• Daily agency coordination calls for all agency team leaders • Documented sign-off processes for implementation plans that include relevant cross-agency consideration
Policy-to-agency review	Policy and agency review teams should coordinate on first-day, 100-day, and 200-day plans and understand the comprehensive set of areas each agency is responsible for (eg, guidance for commerce agency review).	• If working in person, colocation once per week • Beginning- and end-of-week pull-up and pull-down meetings
	Policy and agency review teams need a clear understanding of how agency budgets will be developed and how that process will affect policy implementation.	• Joint development of budget-setting processes along with operations • Biweekly policy and agency review all-hands calls focused on the budgeting process
Personnel-to-agency review	Personnel should include agency review teams in early slate development to avoid selection of nominees in silos and instead approach selection as an assessment of agency needs from a portfolio perspective.	• Clear and transparent system for agency review teams to submit suggested appointees and nominees • Weekly or biweekly committee meetings, led by personnel and appointments, to gather perspectives from agency review and others

Appendix B: Staffing and integration management across three priority functions

Pivotal to the success of the transition team, the policy, agency review, and personnel and appointments functions deserve special consideration in scope, staffing, and operating model.

Policy

The policy office typically develops day-one, 100-day, and 200-day policy plans, including proposals for legislation to renew or let lapse and executive orders to pursue. This team is usually "lifted and shifted" from the campaign where staff have been working on these issues for months.

Plans developed by this office are critical to guiding the work of other parts of the organization, and yet the process of developing policy and implementation plans is often chaotic and inefficient due to lack of integration and communication, especially between the policy and agency review teams. Because of the importance of this relationship and the drastically different sizes of the two teams (agency review may be six times the size of the policy team), formal mechanisms may need to be put in place to facilitate collaboration (for example, co-locating, daily coordination calls, or formal document review processes).

Given the interconnectedness of the policy team's work with other functions, getting the policy team up and running early can prevent bottlenecking and support smooth functioning across the integrated post-election transition team. Because little policy is created in the last few weeks of the election, the pre-election transition team could identify and convey intended offers to select policy team members several weeks before the election. As long as the campaign agrees that this will not unduly divert focus and impede their efforts, these members could jumpstart key tasks such as the compilation of relevant campaign promises for agency review teams and the drafting of executive orders for general counsel review. If transition work is remote, bringing policy team members on board before the election will be even easier as they won't have to immediately relocate and could potentially continue to support both efforts where needed, gradually shifting to the transition team on a full-time basis.

Agency review

Agency review teams play two primary roles: assessing and codifying the culture, responsibilities, and challenges of specific federal agencies; and identifying key roles to fill. It is important to ensure strong coordination with other critical functions such as policy and personnel.

The following three best practices can help ensure a smooth integration:

— *Be intentional in the staffing strategy.* There are two dominant approaches to staffing a gency review teams, each with its benefits and challenges:

Approach A: Staff personnel to the agencies in which they are likely to be offered full-time positions. This prioritizes continuity and leadership preparedness and helps transition to governing. However, it can lead to distracting power dynamics (for example, people vying for positions) or failure to hire highly effective staff because they are interested in temporary or short-term roles with the transition team rather than full-time positions in the administration.

Approach B: To curtail distracting power dynamics, avoid staffing people to the agencies they are likely to join full-time. This approach may lead to a longer ramp-up and onboarding period after the inauguration for those full-time employees who did not have the transition period to get up to speed on the agencies within which they will be working, but it avoids some of the pitfalls of the other approach.

— *Include the right mix of skills.* An effective agency review team typically includes a hybrid of campaign, pre-election transition, and other personnel. Campaign experts and external advisors offer deep agency and subject matter expertise; pre-election transition team personnel who have been preparing publicly sourced agency memos provide continuity; and junior staff—often from the campaign—serve in support roles.

— *Don't overstaff.* Agency review teams have historically made up the largest portion of the post-election transition team, with anywhere from 200 to 500 staff. In the past, these teams have often been used as a "soft landing" for more junior loyalists or campaign staff. As a result, these teams have at times ended up two or three times larger than they need to be, stretching managerial, HR, and other resources thin and failing to position junior staff for success. Best practice suggests hiring only for roles deemed necessary, maintaining firm guidelines on hiring, and creating a standard process for future hires.

Personnel and appointments

The personnel and appointments team is responsible for refining the recommended slate of names for president-elect appointments, vetting nominated candidates, and (in coordination with legislative affairs) helping the nominees prepare for and navigate the confirmation process.

Personnel staff are typically a mix of campaign, pre-election transition, and other experts. Pre-election transition staff who were working on slate development make up the majority of the post-election team and offer continuity. Additionally, high-level, well-connected campaign staff can speak to the skill sets and expertise of individuals the president-elect might want included, while junior campaign staff who worked to vet donors often have the appropriate expertise to serve on the vetting team. Finally, staff dedicated to navigating the actual confirmation process (in coordination with legislative affairs) will likely need experience with and an understanding of the confirmation processes and therefore may come from many sources, including the Hill.

Appendix C: Starter checklist for key questions about decision rights

Asking and answering a few questions about key roles can help establish decision rights.

Overall

— Which decisions does the president-elect make?

— Which decisions will be made by the chief of staff (CoS), once named?

— Which decisions will be delegated to the executive director (ED) or chair (as well as CoS, cabinet secretaries, and other direct reports)?

— What types of decisions will senior appointees make, once named?

Incoming White House chief of staff

— How will the president-elect be informed of decisions made by the CoS?

— Which decision rights will the CoS take over from the ED or chair? How will the CoS be informed of updates on decisions that remain with the ED or chair?

— Who reports directly to the CoS (for example, White House staff as named)? Who does the ED or chair report to?

ED or chair

— How will the ED or chair get input from the president-elect and CoS on decisions he or she makes?

— What types of decisions will be delegated to the function leads? How will the ED or chair be informed of those decisions?

Head of personnel (either PPO head or transition team personnel lead)

— What types of personnel decisions must be submitted to the president-elect, or ED or chair? How do all relevant parties stay informed of personnel decisions?

— What personnel decisions will be made by another function (for example, legislative affairs)?

— How will personnel ensure decisions are being made holistically (for example, considering diversity for the entire portfolio of appointees across departments)?

— In the event the transition team personnel lead and PPO head are different people, how will they split decision rights?

Transition team function lead (for example, head of agency review, head of policy)

— What types of decisions need to be run by the ED or chair? How do function leads ensure they are looping in the right stakeholders?

— How do teams interact with communications, public liaison and government affairs, general counsel, legislative affairs? Which decisions need to be run by each of those functions, and how do the functions stay informed?

— What coordination process will function leads follow to ensure there is no duplication of work or gaps in coverage (for example, ensuring only one slate of appointees is being developed)?

— What types of decisions will be delegated to staff? How will the function lead be informed of those decisions?

— Who is responsible for holding which staff accountable for their work?

Agency lead on agency review team (for example, head of Department of Homeland Security review, head of Department of Energy review)

— Which decisions will be made by the agency review team (for example, agency personnel decision rights between personnel, policy, agency review, and the agency transition team)?

— What level of input will the teams at the agencies have on agency review deliverables (for example, memos to the president-elect, cabinet secretaries)?