
Guidelines for Cabinet Orientation

The president and members of his Cabinet must work together as a cohesive team with a shared vision, common values and clear priorities. The challenges facing government today require leaders to work across agencies and marshal the resources of their respective agencies to address difficult, longstanding problems.

President Obama hosted a retreat for his Cabinet in the summer following his inauguration to build important relationships and create a shared sense of purpose among his Cabinet members. However, the retreat did not occur until summer, several months after the inauguration. In the view of one senior Obama official, the offsite should have happened much earlier in the president's administration to have had maximum impact on the Cabinet as a team.

Creating the culture of the president's Cabinet should begin early. Planning for a Cabinet-level offsite with the president should begin well before Inauguration Day, and the offsite itself should happen as close as possible to the inaugural, provided a significant majority of Cabinet members have been identified and/or are well into the confirmation process.

Ideally, the new president or president-elect should spend dedicated time with his Cabinet and senior White House staff to cover a range of issues essential to effective governing and service as a Cabinet secretary:

Values and Vision

- What are the values that will guide the work of this Administration? How will each member of the Cabinet demonstrate those values? What is this Administration's "brand"?
- What is the president's vision for the first 100 days, the first year and the first term, and how will the senior leadership team contribute to realizing that vision and engage others in doing so?
- What are the specific goals and milestones by which the president will measure progress in
- The economy and fiscal outlook?
- Policy?
- Personnel?
- Management improvement?
- Addressing government-wide challenges?
- In what key ways will the Administration leave the federal government better than we found it?

Making Decisions in the Administration

- What is the president's intention with respect to the frequency and purpose of White House staff meetings, Cabinet meetings and the role of each individual in those meetings?
- Which existing interagency bodies exist, or what new interagency bodies will be established, to enable collaboration across departments and agencies in addressing government-wide challenges? How and by whom will government-wide initiatives be prioritized?
- How will the departments work with the White House on policy, personnel and other management decisions?
- Where do Cabinet secretaries have autonomy?
- How and by whom will decisions and progress be shared with the American people?

Emergency Response

- Line of succession
- Role of the White House Military Office
- Continuity of Government plans
- White House level
- Department level
- Knowing when there is an emergency, and knowing one's role

- Understanding and navigating response across agencies and sectors
- Knowing the key emergency response staff in one's department
- Keys to a rapid and effective emergency response

In addition, there is essential knowledge that Cabinet members and senior members of their leadership teams need to have on “Day One” in order to get off to a good start, avoid mistakes and accomplish objectives. An orientation program should be initiated for members of the Cabinet and senior agency officials on the following key issues:

Understanding the Federal Environment

- What makes the federal government unique or different from the private sector?
- Mix of career and political staff
- Partisanship
- Budgeting complexity
- Layers of oversight and accountability (including accountability to Congress)
- Difficulty of measuring outcomes/results
- Cross-cutting nature of challenges
- “Living in a Fishbowl”
- Rewards—“best job I ever had”
- What are the hallmarks of a successful leader in the federal government?

Leading in the Federal Space: Being Smart and Avoiding Costly Mistakes

- Good habits and practices
- Get to know your Designated Agency Ethics Officer
- Common ethics and legal violations and how to avoid them
- Government funds—expense accounts, credit cards, etc.
- Personnel (may include hiring/firing dos and don'ts)
- Travel
- Procurement
- Lobbyists
- Avoiding legal behavior that could nevertheless create impression of impropriety or embarrass the President

Opportunities for Transforming Government

- What are the challenges facing government (both long-standing and emerging) that require a government-wide approach and sustained attention over time?
- GAO High Risk list; prior presidents' management agendas
- What does it take to make real, systemic change and fix chronic problems?
- Choosing where to prioritize and invest in order to address these challenges

Managing the Political/Career Interface

- Role of the career staff
- What signals does this Administration want to send to career employees? To subordinate political appointees?
- Engaging career staff early and often
- Identifying and re-recruiting top career talent
- What are the key positions and are they filled with the right people?
- Who are the key people you need to know, and who you will need to be successful?
- Understanding union activity in your department

Federal Budget Process and the Role of OMB

- Understanding the president's budget as a statement of policy
- OMB's role
- Concurrent budget processes
- Where and when Cabinet secretaries can have an impact
- Coordination with White House and OMB—how it's done and what the process looks like

Working with Congress

- “Board of Directors” role; culture of House vs. Senate
- Legislative, oversight and appropriations responsibilities
- Keeping an agency out of trouble—i.e., doctrine of no surprises
- Role of GAO
- Who a Cabinet secretary needs to know, and who they need as an ally

Working with the Media/New Media

- Staying on message and reflecting the President’s priorities
- Using the media to advance priorities
- Using the media to communicate with the American people
- New media—voiding mistakes, creating and seizing opportunities

Forming and Using Your Senior Leadership Team

- Clarity of roles and governance
- Choosing the right model
- Roles of a deputy secretary
- Roles of a chief of staff

Identifying and Working with Allies Outside of the Federal Government

- Identifying organizations and individuals who can help advance the president’s agenda
- Communicating with the American people and engaging the public in addressing challenges
- Engaging the Nation’s governors and local leaders

*See Section 3 of the Presidential Transition Act of 1963, as amended. 3 U.S.C. § 102 note.



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