# Agency briefing materials for Landing Teams

## transition binder for The landing team: table of contents

1. **Agency contact**
   1. Name, title, and contact information for agency liaison to landing teams
2. **In-person Briefing Schedule**
   1. Topic / date / time / location of in-person briefings
   2. Interview guide
3. **Organizational Overview**
   1. Overview of organization’s mission and priorities
   2. Organizational chart – *highlight key decision makers, influencers, etc.*
   3. Biographies and head shots of career and political staff in key leadership positions
4. **Top Issues for New Leadership**
   1. 30/60/90 day issues – *Include a visual calendar of critical path events and deadlines with supporting 1-2 page issue papers for critical topics*
      1. Management issues (e.g., operational, budget, and financial)
      2. Draft 2018-2022 Agency Strategic Plan and 2018-2019 Agency Priority Goals
      3. Potential legal, media, or congressional issues, and GAO/OIG reports
      4. Cyber security issues
      5. Key congressional or outside contacts for each issue
   2. Pending decisions
   3. Process for decision approval
   4. Quick wins – what can be accomplished in the first 100 days – *tailor to each campaign*
5. **Budget Overview**
6. Major budget changes from 2009-2017
7. Funding sources
8. Expenditures by program - *highlight areas of flexibility, cost cutting opportunities, etc.*
9. **Congressional Relations and Issues**
   1. Oversight committees (oversight, authorization and appropriations)
      1. Membership and key issues for each
      2. Key staff – *include career agency staff who manage relationships*
      3. Overview of previous hearings
      4. Current inquiries
   2. Other members with special interest or subject matter expertise
   3. Confirmation hearing prep
      1. Leadership and members
      2. Top issues addressed at hearings
      3. Process, logistics, and historical roadblocks
   4. Implications of Continuing Resolutions
   5. Implications of changes in new Congress (e.g., majorities, chairmanships, etc.)
10. **Administrative Information**
    1. Contact information for agency transition team and immediate office staff
    2. Security procedures, transportation and parking information
    3. Computer access, IT usage information, telephone instructions
    4. Map / floor plan of organization facilities (including evacuation plans)

# Agency "OWNER’S MANUAL"

## TRANSITION BINDER “THE OWNER’S MANUAL”: TABLE OF CONTENTS

1. **In-person Briefing Schedule**
   1. Topic / date / time / location of in-person briefings
   2. Briefing guide
2. **Organizational Overview**
   1. Organization’s mission / strategic plan / priorities
   2. Organization’s history
   3. Statutory requirements and enabling legislation
   4. Key mission delivery performance measures/scorecard
      1. Performance agreements
   5. Historical performance outcomes
   6. Organizational chart (with headcount) – *highlight key decision makers, influencers, etc.*
   7. Order of succession
   8. Biographies and head shots of career staff in key leadership positions
   9. Biographies and head shots of political staff in key leadership positions
   10. List of agency detailees on the Hill and other agencies
   11. Workforce data and trends
       1. Size of workforce
       2. By level (Executive and senior level, General Schedule, Federal Wage System, other)
       3. Length of federal service
       4. % retirement eligible
       5. Age breakdown of workforce
       6. % of positions vacant
       7. Agency profile trends over time
   12. OPM limits on Schedule C’s/non-career SESs and rules pertaining to hiring
   13. Organizational culture overview
       1. FEVS and Best Places to Work data
   14. Important relationships with other federal agencies
3. **Top Issues for New Leadership**
   1. 30/60/90 day issues – *Include a visual calendar of critical path events and deadlines with supporting 1-2 page issue papers for critical topics*
      1. Management issues (e.g., operational, budget, and financial)
      2. Draft FYs 2018-2022 Agency Strategic Plan and FY 2018-2019 Agency Priority Goals (due to OMB June 2017)
      3. Potential legal, media, or congressional issues, regulatory actions, expiring authorities, recent GAO/OIG reports especially high risk issues
      4. Cyber security infrastructure and Cybersecurity National Action Plan (CNAP) related procedures
      5. Key congressional or outside contacts for each issue
   2. History of key management initiatives and mandates
   3. Pending decisions
   4. Issues requiring White House involvement
   5. Process for decision-making
   6. Common challenges or roadblocks to policy
   7. Most important political staff positions needed to be filled
   8. Quick wins – what can be accomplished in the next 100 days – *tailored to each campaign*
      1. Administrative action
4. **Budget Overview**
   1. Basic guide for understanding key budget details
   2. Budget dashboard that agency staff can update on an ongoing basis
   3. Major budgetary constraints
   4. Budget history
5. Major changes from 2009 to 2017
6. Historical context of budget decisions, changes, and implications
   1. Funding sources
   2. Expenditures
7. Personnel/non-personnel expenses by program – *highlight areas of flexibility, cost cutting opportunities, etc.*
8. **Component/Division Information** *– This should be an enterprise overview. In-depth binders may be developed for major components.*
   1. Mission
   2. Organizational chart
   3. Workforce
   4. Budget
   5. Top issues
9. **Oversight** 
   1. Office of the Inspector General (OIG)
      1. Biography of the Inspector General
      2. Top issues and recent reports
   2. Government Accountability Office (GAO)
      1. High Risk List
      2. Duplication Reports
10. **Governance**
    1. Key structures and decision making processes
       1. Talent and performance management
       2. Budget process
       3. Risk assessments
    2. Calendar of agency actions and activities
    3. Participation in Enterprise Government activities
       1. Interagency council membership
       2. Cross-department initiatives and funding
       3. Shared Services
11. **Policies and Regulations**
    1. Overview of historical policies and regulations
       1. Number of new regulations per year
       2. % deemed significant by OIRA
    2. Recently adopted or pending policies and regulations
    3. Overview of the policy/regulation review and enforcement process
12. Enforcement issues
    1. Summary of litigation
13. **Congressional Relations and Issues**
    1. Oversight committees (oversight, authorization and appropriations)
       1. Membership and key issues for each
       2. Key staff – *include career agency staff who manage relationships*
       3. Overview of previous hearings
       4. Current inquiries
    2. Other members with special interest or subject matter expertise
    3. Confirmation hearing prep
       1. Leadership and members
       2. Top issues addressed at hearings
       3. Process, logistics, and historical roadblocks
    4. Required authorization / appropriations reports and updates to Congress
    5. Key pending legislation
    6. Implications of Continuing Resolutions
    7. Implications of changes in new Congress (e.g., majorities, chairmanships, etc.)
14. **External Stakeholders Overview and Issues (media, federal employee unions, interest groups, and regulated entities)**
    1. Stakeholder group overview (mission and leadership)
    2. Special initiatives or hot topics of the stakeholder
    3. Recent engagements with stakeholder
    4. Pertinent third party reports (e.g. NTSB)
15. **Crisis Management and Emergency Response**
    1. Emergency response plan
       1. Roles / responsibilities
       2. Decisions to be made
    2. Continuity of operations information
    3. Primary points of contact
16. **Administrative Information**
    1. Contact information for agency transition team and immediate office staff
    2. Security procedures
    3. IT issues
17. Privacy infrastructure
18. Key IT contacts
    1. Computer access, technology usage information, telephone Instructions
    2. Map / floor plan of organization facilities (inc. evacuation plans)
    3. Transportation and parking information
    4. Lessons learned for success on Day 1 (e.g., opportunities to streamline administrative processes to address surge in demand)