Agency Briefing Template

TABLE OF CONTENTS

***Key audience****: Agency review team members (post-election)*

***Source****:* [*Agency Transition Guide*](https://presidentialtransition.org/transition-resources/agency-transition-guide/) *(chapter 2 - planning, page 41)*

*Agency review teams that arrive at agencies post-election look for information to help make decisions on certain appointments, including potential holdovers and key career staff, and to develop an assessment of conditions inside the agency for the president-elect.* *The materials created for these teams should be concise and tailored to three main priorities. Key elements of this briefing are outlined below.*

1. **AGENCY CONTACT** 
   1. Name, title and contact information for agency liaison to agency review teams
2. **IN-PERSON BRIEFING SCHEDULE**
3. Topic/date/time/location of in-person briefings
4. Interview guide
5. **ORGANIZATIONAL OVERVIEW**
6. Overview of organization’s mission and priorities
7. Organizational chart—highlight key decision makers etc.
8. Biographies and headshots of career and political staff in key leadership positions
9. **TOP ISSUES FOR NEW LEADERSHIP**
10. 30/60/90-day issues – Include a visual calendar of critical path events and deadlines with supporting one-to-two-page issue papers for critical topics
    * 1. Management issues (e.g., operational, budget, and financial)
      2. Draft fiscal Agency Strategic Plan and Priority Goals
      3. Potential legal, media, or congressional issues, regulatory actions, expiring authorities, recent GAO/OIG reports especially high-risk issues
      4. Cybersecurity infrastructure and Cybersecurity National Action Plan (CNAP) related procedures
      5. Key congressional or outside contacts for each issue
11. History of key management initiatives and mandates
12. Pending decisions
13. Issues requiring White House involvement
14. Process for decision-making
15. Quick wins – what can be accomplished in the next 100 days – tailored to each campaign
16. **BUDGET OVERVIEWS**
17. Major budget changes
18. Funding sources
19. Expenditures by program—highlight areas of flexibility, cost-cutting opportunities, etc.
20. **CONGRESSIONAL RELATIONS AND ISSUES**
21. Oversight committees (oversight, authorization and appropriations)
22. Membership and key issues for each
23. Key staff – include career agency staff who manage relationships
24. Overview of previous hearings
25. Current inquiries
26. Other members with special interest or subject matter expertise
27. Confirmation hearing prep
28. Leadership and members
29. Top issues addressed at hearings
30. Process, logistics, and historical roadblocks
31. Implications of Continuing Resolutions
32. Implications of changes in new Congress (e.g., majorities, chairmanships)
33. **ADMINISTRATIVE INFORMATION**
34. Contact information for agency transition team and immediate office staff
35. Security procedures
36. Computer access, technology usage information, telephone instructions
37. Map / floor plan of organization facilities (including evacuation plans)
38. Agency “owner’s manual”