**Sherpa Process**

**Sherpa Requirements**

* Flexible schedule
* Knowledge of Committee and Committee approach
* Thorough knowledge of agency issues, personalities, and process
  + Sherpa must thoroughly read the Nominee book and understand the issues

**Sherpa Guidance**

* On Nominee Paperwork
  + Must be thoroughly reviewed
    - You must personally review all Nominee paperwork prior to submission to OGE, White House, Agency, and Hill
    - You can do this with the Nominee or individually
* On Requesting Meetings
  + Keep Detailed Records
    - Who, what, when, where, why
  + Order of the Request is Critical
    - Observe seniority protocol
      1. Republican Leader McConnell
      2. Senate Republican Chairman/Ranking Members
      3. Senate Democrat Chairman/Ranking Members
      4. Republican Members of Committee in order of seniority
      5. Democrat Members of Committee in order of seniority
  + Selecting Members for Meetings
    - May be best to avoid democrats who are overly critical of your nominees agency
    - You will need to check with committee leadership to identify these people
* Senate Staff Outreach
  + Contact GOP Staff Directors immediately following GOP Leadership contact
    - Identify which staffer handles nominations
* On Member Meetings
  + Actual Meeting Order
    - Leadership First then the rest
    - Use your judgment based on personalities
  + Keep Detailed Records
    - Who, what, when, where, why
  + Meeting Attendees
    - Never let the Nominee go to Hill alone
      * Keep the group small because it will be a big deal
      * Only the Nominee and Sherpa should be in the meeting
      * This will be a big deal with photo ops for the public\
  + Meetings Press
    - Press may be around before or after meetings
    - Nominee should not say anything except, "We had a fine session and will reserve my answers for the committee at the hearing"
* On House Member Meetings
  + Offer to meet with Speaker
  + Offer to meet with nominee’s home district member (if supportive)
    - Solicit this member to introduce the nominee to Senate Committee, along with home state Senators
  + Offer to meet with GOP Chairmen of Key House Committees
    - Try to schedule these for after confirmation (most should oblige)
      * If impossible keep them polite but brief
  + NO OTHER MEETINGS
* On Agency Meetings
  + Nominee may want to meet with their predecessor
    - Admin Assistant or Sherpa will set this up
    - Cannot take place in the agency building or anywhere near it
      * ie. a low key, public location for Saturday breakfast
    - Nominee cannot go to agency building until confirmed
  + Sherpa should reach out to the agency’s Congressional/Legislative operation
    - Reach out but keep them at a distance
    - Be aware of their personal situation
    - They should be professional and stay out of the way
* On Nominee’s Personal Meetings
* Don’t allow them
* If the nominee insists, limit these as much as possible
  + They must have someone connected to us with them
  + At least the Sherpa needs to be present to take notes etc

**Nominee Guidance**

* On Nominee Paperwork
  + You must thoroughly review all paperwork prior to submission to OGE, White House, Agency, and Hill
* On Member Meetings
  + Agenda
    - Stick to the 80/20 rule
      * Member speaks 80%, Nominee 20%
      * Stick to listen only mode
    - Keep to confirmation process issues
    - Avoid in depth Policy discussions
    - Do not let confirmation become contingent to policy commitments
      * Never make policy commitments
      * Nominee cannot commit the President-Elect to anything
* On Agency Meetings
* On Personal Meetings

**Sherpa Task Checklist**

* Nominee Paperwork Review
  + Sherpa Review of all paperwork
  + Nominee Review of all paperwork
* Meeting Requests
  + Meetings requests made in order of seniority
    - Nominee Admin Assistant or Sherpa makes request
    - Meeting Request Form submitted to appropriate staff member?
* Senate Staff Outreach
  + Contact GOP Staff Directors
    - Identify and Record nominations staffer contact information?
* Member Meetings
  + Member meetings held with Leadership first
    - Member Meeting Notes Form submitted to appropriate staff directly following each meeting?
* Agency Meetings
  + Set up meeting with current Agency Secretary
    - Nominee Admin Assistant makes request
    - Agency Meeting request form submitted to appropriate staff member?