**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?