**Sherpa Task Checklist**

1. Committee Staff Outreach
   * GOP Staff Directors Contacted
     + Nominations Committee staffer identified and contacted
     + Committee paperwork obtained and completed
2. Nominee Committee Paperwork Review and Submission
   * Paperwork reviewed by thoroughly by Nominee
   * Paperwork reviewed by Sherpa
   * Committee paperwork submitted
3. “Nominee Book” Review
   * “Nominee Book” studied by Nominee
   * “Nominee Book” studied by Sherpa
4. Internal Briefings
   * Nominee received internal policy briefings
   * Sherpa received internal policy briefings
5. Meeting Requests
   * Meetings requested
     + Meetings requested by Administrative Assistant or Sherpa
     + Meeting Request Form submitted to Nominations Team
6. Member Meetings
   * Member meetings held with Leadership
   * Member meetings held with relevant Senators
   * Member Meeting Notes Form submitted to Nominations Team
7. Confirmation Hearing
   * Determine time and place
   * Notify relevant policy staff and nominations team
   * Provide logistical and transportation support

**Sherpa Guidance**

**Nominee’s Personal Meetings**

* Nominee must devote all time to confirmation process
  + No work on current position etc.
* Do not allow Nominee to have any meetings or discussions with special interest representatives related to the Nominee’s perspective Agency
* No public comments should be made regarding the Nominee’s perspective agency or any other issue
* Ensure the Nominee has canceled all speaking commitments and requests during the nomination process

**Committee Paperwork for the Nominee**

* + Must be thoroughly reviewed
    - You and the Nominee must personally review all committee paperwork prior to submission
    - You can do this with the Nominee or individually

**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

**Senate Staff Outreach**

* + Contact GOP Staff Directors immediately following GOP Leadership contact
    - Identify which staffer handles nominations

**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
      * Prepare for disorder pre and post meeting
        + ie media, camera crews, photos, etc
  + Agenda
    - Stick to the 80/20 rule
      * Member speaks 80%, Nominee 20%
      * Stick to listen only mode
    - Try to keep to confirmation issues
      * However, do not shy away from other issues of the Senator’s choosing
    - Avoid confirmation becoming contingent to policy commitments
      * Nominee cannot commit the President-Elect to policy commitments
  + Media and Press
    - Media may be around before or after meetings
    - Nominee should avoid policy comments,
      * ie "We had a fine session and will reserve my answers for the committee at the hearing"
    - Sherpa should not talk to the media

**House Member Meetings**

* + Priority should be given to the Senate
  + Offer can be made to meet with Speaker
  + Offer to meet with nominee’s home district member (if supportive)
  + 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