**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