



# Advice to Incoming Agency Leaders from Those Who Have Been There

January 19, 2022





## About the Partnership

The Partnership for Public Service is a nonpartisan, nonprofit organization that works to revitalize the federal government by inspiring a new generation to serve and by transforming the way government works. The Partnership teams up with federal agencies and other stakeholders to make our government more effective and efficient.



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As President Joe Biden’s administration enters its third year, conventional wisdom suggests there will be a number of key changes to the leadership teams running federal agencies. Some senior officials will get promoted while others will leave. Some will just be starting their jobs after finally getting through the [lengthy Senate confirmation process](#). In the past six months, about 230 people have been confirmed by the Senate to begin work in key leadership roles.

Starting a new role midway through a president’s term has unique challenges; it can feel like relationships and processes are already established. To help new political leaders hit the ground running, the Partnership for Public Service’s Center for Presidential Transition® and the [Boston Consulting Group](#) interviewed about 15 current and former officials from across different administrations with top management experience in government. These officials shared reflections on their first few months on the job and offered advice to future political appointees.

This report compiles our interviewees’ knowledge of government, management expertise and practical lessons to offer a roadmap for a successful start to any federal leadership appointment. **Their advice centers on three key areas:**



**Learn your agency and position.** While it might sound obvious, your most important task is to understand what you and your colleagues can influence. You must understand your authority, personnel and budget so you can maximize opportunities despite constraints. This knowledge will allow you to be creative and determine how your responsibilities are interconnected with across the federal enterprise.



**Build a unified team.** You will encounter vacancies in important political and career positions. While the leaders of your agency must work to fill those vacancies with the best candidates as quickly as possible, the reality is that federal hiring processes can be lengthy—and positions requiring Senate [confirmation have taken longer to confirm](#) for each successive administration, so these vacancies could persist. Your immediate effectiveness depends on building a unified team among the career civil servants and political appointees in place.



**Leverage governance structures.** Your agency will have existing channels of communication and decision-making forums. Learn how to be effective within these structures and, where appropriate, adapt them to meet the priorities and decision-making style of your leadership team.

These three areas have one unifying theme: political leaders must take the initiative to find the information, build relationships and create the processes that will help them accomplish the administration’s priorities.

It helps to arrive at an agency with relevant knowledge from job experiences—as many of our interviewees did—but the following advice is designed to help new appointees from any background accelerate progress of priorities once in office.



## Tip 1: Learn Your Agency And Position

Making policy recommendations from outside government is different than executing policy given the responsibilities and constraints of holding office. When running programs such as grant delivery, national security and safety oversight, the stakes are high: the [public's trust in the government](#) is closely linked to their experience interacting with an agency. Our interviewees stressed the importance of asking the right questions to understand the main issues your agency faces—early and with urgency.

Many appointees described having little to no time to learn once they started the job and advised incoming officials to read up on the agency as much as possible before their first day. “If you haven't spent the time to learn about the agency ahead of time, you're already at a disadvantage,” one official said.



### Learn Your Role

- **Connect with people who previously held the position and understand the value of your new role within the agency.** Ask your predecessors to help clarify your key responsibilities and offer advice on adjusting to the culture of your agency. Every official who was able to meet with their predecessors said the conversation was invaluable. In addition to providing insight on recent news reports, predecessors can offer perspective on risks and recommendations offered by the Government Accountability Office and your agency Inspector General.

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*“I got to sit down with five or six outgoing politicals from the [previous] administration before I started...the outgoing chief of staff [and] several of the outgoing folks who were nice enough to give me their time and at least give me the lay of the land of what I was walking into. So that is definitely a best practice that I offered to the incoming chief of staff when I left.”*

***Former agency chief of staff***

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- **Learn the formal and informal organizational chart.** New appointees must understand the official chain of command defining who will be consulted on particular decisions. As importantly, one chief of staff advised new appointees to think of informal sources of authority in terms of concentric circles around political leaders—those whose impact may be unwritten, but who influence decisions and the ability to generate lasting results.
- **Find the individuals in other agencies whose responsibilities intersect with yours and establish regular touchpoints to build strong relationships.** Issues are increasingly cross-cutting, and responsibility for topics such as international trade, cybersecurity and social services is shared across multiple agencies. Learn which agencies are among the stakeholders for your program areas and develop a team environment with the people invested in accomplishing those shared priorities.



## Understand the Laws, Budgets and Programs in Your Purview

- **Form strong relationships with career staff who have deep experience in the history and status of ongoing programs, policies and risks.** Career staff are often the best source of information regarding the operation of your agency, particularly the funding and legal authorities that are key to tangible accomplishments. One chief of staff shared, “You’ve got a lot of career folks who have been...working on a prior team, priorities and policies and implementing them in good faith. Making sure they knew you value their perspective was really key.”

“There weren’t a lot of political [in place when I started],” another recent appointee explained. “I learned most about...the organization and the operations through my relationships with different career employees. The mindset for someone like me coming in from the outside was that federal workforce was very bifurcated with political here and careers here and they butt heads... and it isn’t like that.”

- **Schedule conversations with your general counsel, chief financial officer, assistant secretary of public affairs and assistant secretary of legislative affairs, or their representatives at your level, as soon as possible.** One official described making a spreadsheet consisting of the names of relevant stakeholders and prioritizing them based on responsibilities, rank and proximity. The people in these roles are critical for understanding your authorities and making informed decisions.

- **Use those conversations to fortify respect for requirements and understand where a creative, problem-solving approach is necessary.** Several interviewees noted that while many requirements for agencies are set by law, only some of these receive the funding required to implement them. Hard resource choices are inevitable.
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*“You can learn a lot about what you need to do from a policy standpoint first by understanding what your legal and regulatory mandate is...I think the trick for most political appointees is to figure out how do you get [something] done so you’re complying with both the letter and spirit of the legislation.”*

***Recent appointee with significant business experience***

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- **Depending on your role, be in close contact with the Office of Management and Budget.** Your OMB program examiner will be one of the most knowledgeable people about the history of appropriations for your programs and areas of ongoing debate. Staff at the Office of Information and Regulatory Affairs will also share regulatory guidelines and be important resources for making changes.



## Tip 2: Build a Unified Team

Successful leaders are able to build a team that integrates the knowledge and skills of both political appointees and career staff. The career workforce is the heart of the federal government and reflects the most fundamental principal of democracy: a government that is continuous and functions effectively no matter who is in charge.



### Plan to Manage Your Team Around Vacancies in Key Positions

- **Identify both the political and career vacancies on your team. Anticipate that hiring for both categories will be time-consuming.** Several leaders we spoke with were surprised to find out how many positions needed to be filled once they took office, and how slow they were to fill over time. The [slow Senate confirmation process](#) is one significant factor, as are vetting, security clearance and hiring processes.

“I thought that we would be mostly staffed up on our confirmed personnel well within year one,” an official who began near the start of the Biden administration explained. “We’re well through year two at this point and we’re not very close to having all our confirmed personnel.”

Meet the officials responsible for hiring and strategize on how to fill vacancies with the greatest efficiency. In the interim, find the people across government performing necessary functions related to yours so you can start accomplishing priorities even without a full staff.

- **Do everything you can to prepare in advance for the arrival of new appointees.** Prepare lists of people that confirmed officials should meet upon arrival. As one official said, this prevents people focusing on lower priorities from getting in the door first. Gauge the likely priorities of new Senate-confirmed appointees from their congressional testimony and public statements, along with any appropriate interactions prior to confirmation. Prioritize hiring for the roles and skillsets needed to match the incoming leaders’ goals. In the interim, seasoned career executives are accustomed to stepping into acting roles and stepping back when appointees arrive.



## Build Connectivity Between Political and Career Staff

- **Clarify and clearly communicate responsibilities for staff in all roles under your purview.** Changes in agency leadership are [times of uncertainty](#) for many career staff, and defining responsibilities helps to alleviate some anxiousness.

One official shared their experience of being on the receiving side of leadership changes. “I remember being a career civil servant and having the new [president’s] team arrive and say, ‘Yeah, we’re not doing it that way anymore. We’re going to do it this way.’ As a career person, you want to be helpful and you want to obviously implement what the president’s trying to do, especially if you’re working in the White House. But it does take a little bit of a mental shift. I think political appointees—in particular at senior levels—have to be conscious of that mental shift and the fact that folks have been doing things a certain way for a certain period of time...and it may take a minute. A little bit of patience, a lot of transparency and a lot of communication are really essential.”

- **Recognize and address the challenges facing your career staff.** Addressing morale issues early will help protect and maintain your best talent, as well as build trust to resolve future problems. Incoming leaders can use the annual [Federal Employee Viewpoint Survey](#) and the [Best Places to Work in the Federal Government](#)<sup>®</sup> rankings, produced by the Partnership and BCG, to identify and address top employee concerns.



## Tip 3: Leverage Governance Structures

Governance is the set of processes that a leadership team uses to monitor its activities, make or communicate decisions and to evaluate whether it is achieving its objectives. Over time, most agencies have created standardized procedures governing how and when component heads meet to make decisions or stay connected on priorities. In some agencies, these structures last across administrations. In others, they change depending on new leadership preferences. For new appointees, an effective tenure starts with learning, maintaining and adapting governance practices that align with needs and styles of the agency's leadership.



### Learn the Existing Processes Your Agency Uses to Make Decisions and Adjust as Necessary to Match New Leadership Preferences

- **Leaders should decide the purpose and value of meetings and forums and be deliberate about who should participate.** All leaders we interviewed agreed that it is critical to have a clear understanding of who should be involved in discussions and how decisions get made and communicated. In some cases, new leaders were able to continue the methods that preceded them. In others, officials felt it was necessary to introduce new forums, adjust meeting cadences, or create new methods for sharing information to conform to new management styles—although they cautioned that substantial changes can be jarring for agency staff.

One senior leader said, “I convene our principals regularly to talk about things that they need to hear and then things that I need to hear. But prior to my getting here, that wasn’t happening...There was no preexisting executive committee that was evergreen, so we had to build that from scratch.”

Another said “It took us a while...to nail the right cadence of oversight meetings by the deputy and the secretary and the enterprise...I think we’ve landed now...but it took us a couple of months to stumble into that structure...One piece [of advice is] to get to the institutional management piece quickly.”

- **Create new, temporary meeting cadences when major priorities involve many offices and complexity.** One appointee talked about managing a major initiative immediately upon taking office and organizing the team to work together. “We had a very tight turn on delivering, so we had to quickly jump in to standing up governance processes...[We tried] to establish a regular battle rhythm—a regular set of meetings at the relevant senior leader levels—in a coherent way that linked the secretary and deputy’s office. We worked on...an approach with integrated senior advisors, a set of priorities and a governance structure in which the deputy secretary served to tee up and support the secretary’s priorities rather than having essentially two principals with separate spheres of influence.”
- **Learn the executive secretary processes that determine how briefing materials, decision memoranda and other official paperwork move through review and finalization.** While new appointees might see these processes as bureaucratic, they are an important way of communicating your best work to the secretary and other leaders. Investing your time to make your submissions high quality will be evident and reflect well on you across the agency.
- **Ask front offices to adapt templates and deadlines to provide leadership with the best information on the most convenient timeline to review.** “My priority as chief of staff... was to put in [place] really strong governance that supported what we were trying to get done... Putting in place our own decision-making structures, our communication processes with the department, our executive secretary rules for paper flow and procedures—that was a big first two, three weeks priority for us,” the official explained. “It evolved too, which I think is natural for any department.”



## Prioritize how Agency Leaders Dedicate Their Time

- **Decide which issues your office will or will not oversee.** In some instances, officials described the need to determine priorities with little to no guidance from the White House. As one chief of staff explained, you must decide how much you expect to manage the organization versus how much you expect to manage the principal.

Another chief of staff advised, “You just have to accept [that you] cannot fix all of the things in the building.” Leaders must have a concrete set of priorities, milestones and initiatives to track over time.

- **Decide how to balance the priorities of dealing with day-to-day operations of any agency—including staffing and human resources concerns—with long-term vision and goals.** The regular operations of any agency can consume all of your time and leaders must make sure they prioritize some staff to thinking big picture, or else such larger goals cannot be accomplished. As one chief of staff shared, “You have to be ruthless on that kind of prioritization in order to make progress in the face of the bureaucracy.”

Another appointee encouraged others to use the structure of their teams to address both areas of responsibility. “You need the team that is dealing with the day to day, dealing with the red flags and really getting themselves in that world. But you need the team that is thinking about the vision and communicating that. And these two teams have to talk because this feeds that, and this sort of pushes and pulls that.”



## Conclusion

Being a political appointee demands that individuals must be proactive and make decisions with relative autonomy. New appointees must quickly gather information about what they are required to do, what they cannot do, where they may face opposition and where they have space to innovate.

One appointee recommended that incoming leaders start by asking, “When you write your thank you note after your tenure, what are the three things you want to highlight?”

The federal government serves the country best when its leaders are efficient, flexible and focused on major achievements. Use your enthusiasm upon entering office to commit to learning, building relationships and the execution that will create successes for you and your agency.

To help prepare federal leaders to successfully prioritize and execute in a federal environment, the Partnership for Public Service created the [Ready to Govern](#)<sup>®</sup> program, a series of 90-minute onboarding sessions aimed at helping federal leaders to navigate a complex organization and accelerate their ability to make an impact.

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