

Second-Term Presidential Planning Guide

Why transition planning is necessary for a successful second-term presidency and how to do it.

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Executive Summary

Presidential challengers generally understand the need to get ready to govern well before an election. However, less attention has been paid to the opportunity for first-term incumbent presidents to plan ahead for a successful second term. The Second-Term Presidential Planning Guide, developed by the Partnership for Public Service's Center for Presidential Transition® and the Boston Consulting Group, offers a roadmap for incumbent administrations to harness their first-term achievements and set the stage for new progress. Through establishing a dedicated second-term planning team, an incumbent administration can set a new standard in planning to achieve its vision and manage the federal government more effectively.

The importance of second-term planning

The transition to a second term presents a unique opportunity for an administration to evaluate its progress, build on the foundations laid in the first term and make plans to implement the vision for the future.

There are five key reasons why a White House should prioritize creating a second-term planning team, including:



Previous administrations have faced significant headwinds in their fifth year, including at least one chamber of Congress controlled by the opposing political party.



White House officials and agency leaders are busy dealing with the day-to-day challenges of running the government and can't dedicate time to focus on long-term planning.



Second-term administrations often see a high level of turnover among senior leadership. Planning can lessen that turnover to promote continuity, reward high performers and inject fresh energy where needed.



A second term is an opportunity to learn from the first term and reset practices as needed.



Winning re-election represents a new mandate from and for the public.

Creating a second-term planning team

A dedicated second-term planning team can allow the White House to better prepare its long-range goals while simultaneously allowing the current administration to focus on managing the government. This team should be created with the backing of the president and the White House chief of staff and should be comprised of trusted advisors and subject-matter experts. The team could be situated inside or outside of the administration as there are benefits and risks to any structure. What is key, however, is that an administration seeking a second term devotes resources and staff to advanced planning.

The role of the second-term planning team

The planning team should focus on several key tasks, including:

- Identifying goals it needs to accomplish to prepare the White House for a potential second term.
- Reviewing first-term management practices and implementation to understand what contributed to key wins and identifying areas for improvement.
- Partner with the Office of Presidential Personnel and agencies to retain highperforming officials and prepare for turnover where needed.
- Make use of management tools such as interagency councils and the required president's management agenda.
- Create implementation plans to enact policy promises within the first 100 days of a second term.

The role of the Executive Office of the President in planning for a second-term agenda

Following re-election, the responsibility to implement the second-term planning efforts will fall to the Executive Office of the President in coordination with Cabinet agencies. Key steps to complete include:

- Collaborate with senior staff to align with campaign promises and communicate the policy priorities for the second term.
- Use the process for designing the president's fifth-year budget proposal to drive priorities.
- Partner with Cabinet secretaries and agencies to execute a second-term agenda as well as long-term planning and goal setting.
- Convene an early town hall with members of the career Senior Executive Service.

The role of agency leaders in second-term planning

Agency leaders are instrumental in translating the White House's strategic vision into actionable plans and meaningful outcomes. To help do so, they should consider the following activities:

- Create their own internal second-term planning team to complement and support the work of the main second-term planning team.
- Refresh and build upon relationships with relevant experts.
- Host agency leadership retreats to plan long-term goals and timelines for a second term.
- Create plans to tackle necessary changes and major accomplishments that were difficult to prioritize in a first term.
- Review and update decision-making processes.
- Partner with PPO to fill vacancies and prepare designees to fill acting roles.

The Center for Presidential Transition serves as the premier nonpartisan source of information and resources to help presidential candidates and their teams lay the groundwork for a new administration or for a president's second term. This guide serves as part of the Center's offerings including the Presidential Transition Guide and the Agency Transition Guide.

Introduction

This guide offers a roadmap for presidents seeking re-election to prepare for a successful second term. While modern presidential challengers have learned the importance of <u>planning</u> in the spring of an election year to get ready to govern, less attention has been paid to the importance of an incumbent administration preparing for the transition to a second term.

It is imperative for any president seeking a second term to establish a dedicated group to evaluate progress against first-term priorities and create plans that build on the first four years. This team could be structured in several different ways—whether it is an external organization or one based within the Executive Office of the President. Regardless of how it is structured and staffed, the critical element for such a team is that its members have dedicated time to devote to second-term planning apart from their day-to-day duties.

An incumbent has benefits that a challenger does not: incumbent administrations have learned to manage the levers of government; they are up to date on the issues each agency must manage; and they can create substantial continuity of top political personnel who will not require a learning curve to get things done.

Such grounding also allows second-term administrations to invest in the overall management of government. This is a critical need that can be difficult for first-term administrations to prioritize.

Through establishing a dedicated team, an incumbent administration can set a new standard in planning to achieve its vision and manage the federal government effectively. For the purposes of this guide, such a group will be known as a Second-Term Evaluation and Planning team—or STEP team. The STEP team should consist of a variety of experts with knowledge of the government, the current administration and planning for presidential transitions.

Officials from recent two-term administrations advise future presidents to commit more time and resources to second-term planning than they did. As Josh Bolten, chief of staff to

President George W. Bush <u>said</u>, those who do not plan fully for a second term are facing "a huge lost opportunity" for an administration to relaunch itself and to refresh its personnel and policy.

Second-term presidents have a distinct advantage over teams planning for a first term: during their initial campaign, they already managed a transition operation to prepare to govern. While any candidate who has previously held the presidency has a greater understanding than someone who has never held the office before, even they must repeat their first-term planning to refresh their personnel and gather the latest information on issues facing agencies.

Establishing a second-term transition team has many parallels to a first-term planning operation. A second-term transition team can help a busy Office of Presidential Personnel retain existing talent and identify new talent, as well as create recommendations to help agencies continue first-term progress and review cross-cutting management processes. What practices worked? What can be improved or made more efficient?

Previous presidents seeking a second term have avoided stand-alone transition operations for several reasons. Such work might be perceived as presumptuous, unnecessary or distracting. Sitting White House staff are busy focusing on the president's current priorities while managing emerging crises. Current staff might also be concerned about losing control over strategic direction to new players.

A dedicated team established for second-term planning will not set the agenda or make large strategy decisions for the next four years. It should exist to develop implementation plans for the priorities of the White House and the campaign.

Thoroughly planning for a second term is not, in fact, presumptuous. It is imperative for responsible governance, and any administration seeking a second term should be as prepared as possible to lead the federal government, should they win re-election. Establishing a team devoted solely to planning for a second term will not compete with those currently conducting the day-to-day work on running the White House—but will complement them by setting up the entire administration for future success.

A dedicated second-term planning team will not set the agenda or make large strategy decisions for the next four years. It should exist to develop implementation plans for the

priorities of the White House and the campaign. If the campaign agenda for a second term is to finish the work that has been started in the first term, the transition team will support the White House leadership and campaign to achieve that goal. A distinct transition team is the best way to conduct effective second-term planning while current leaders are focused on running the day-to-day operations of the federal government.

Produced by the Partnership for Public Service's Center for Presidential Transition® and BCG, the guide explains in more detail why this work is necessary. It also offers options for how to establish such a group, provides recommendations and discusses the areas where political officials across the government can demonstrate their leadership in this effort.

This guide incorporates reflections from approximately two dozen former administration officials, as well as existing literature on second-term planning. This guide serves as part of a series of offerings from the Center for Presidential Transition and BCG, including:

- <u>Presidential Transition Guide</u> The fifth edition of the Presidential Transition Guide, released in 2023, covers the major activities of a transition for non-incumbent presidential candidates and their top campaign and transition staff, as well as the role of the incumbent administration in supporting transition efforts to prepare for a possible turnover.
- Agency Transition Guide Our Agency Transition Guide helps career officials build well-organized internal transition teams to provide incoming senior leaders with critical information about agency policies, operations, budgets and personnel.

The Center for Presidential Transition

The Partnership for Public Service's Center for Presidential Transition serves as the premier nonpartisan source of information and resources to help presidential candidates and their teams lay the groundwork for a new administration or for a president's second term. The Center provides critical assistance on how to organize and execute a transition, helps agency career executives prepare for new political leadership, offers guidance to political appointees on the unique aspects of government leadership and engages with Congress to promote transition reforms.

The Center's online platform, <u>presidentialtransition.org</u>, contains an extensive collection of historical documents from previous transitions and additional guidance such as appointee position descriptions and templates for transition materials.



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Chapter 1: Why Dedicate Resources to Second-Term Planning?

Planning for a second term can be especially difficult since a sitting president is busy with the immense day-to-day challenges of running the government while simultaneously campaigning for re-election. Administration officials already running the government may feel that planning for unpredictable future years is a low priority.

But no administration should miss the opportunity to cement its second-term legacy. Hitting a fifth year running requires the same investment that a challenger candidate makes through establishing a specific and empowered transition planning group. For an incumbent administration, this group must have the explicit support and backing of the White House.

No administration should squander the unique opportunity to cement its second-term legacy. Hitting a fifth year running requires the same investment that a challenger candidate makes through establishing a specific and empowered planning group.

The challenges and opportunities facing a president at the start of a potential second term are unique. There are five key reasons why a White House anticipating a second term should prioritize second-term planning:

Reason 1: Previous administrations have faced significant headwinds in their fifth years, including a frequent change of control in Congress

Recent history demonstrates the challenge that previous two-term administrations have faced in achieving many of their top policy goals. <u>Fifth years</u> have been particularly difficult, with most presidents finding this year to be unproductive. This has been due in large part to a difficult political environment and significant turnover among top staff.

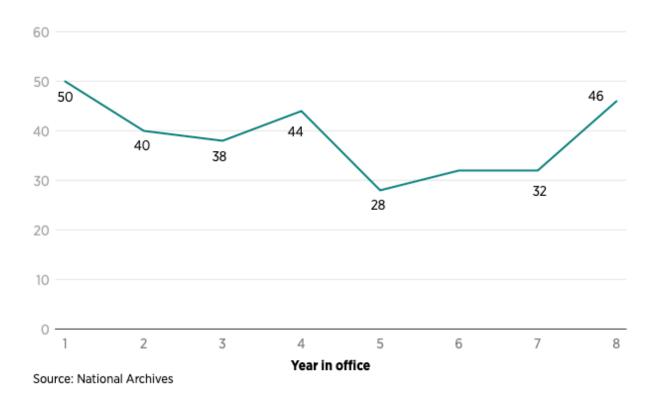
Since President Harry Truman, <u>fifth-year presidents</u> have had to deal with at least one chamber of Congress controlled by the opposition party, with the single exception of President George W. Bush in 2005. This pattern underscores the significance of Congress in shaping a president's second-term agenda and effect on a president's legislative goals.

George W. Bush, for example, <u>was unable to enact Social Security reform</u> in 2005 despite conducting a <u>60-day tour</u> in an attempt to win support. President Barack Obama expressed <u>regret</u> about not being able to accomplish more on gun reform following the mass shooting at Sandy Hook Elementary School just a month after his 2012 re-election.

Administrations in their fifth year have also faced struggles related to policy implementation and oversight. The website launches for the Affordable Care Act and Medicare Part D during the fifth years of the Obama and George W. Bush administrations, respectively, experienced significant technical difficulties. The Bush administration came under fire in year five for its response to Hurricane Katrina. Obama's administration faced criticism when it changed positions on the "red line" policy regarding the use of chemical weapons in Syria.

Executive orders are another common indicator of an administration's productivity. While only one element of governing and a tool best used in specific circumstances, the average number of executive orders during recent two-term administrations was lower in fifth years than any of the first four years in office. This drop may reflect that, given competing priorities in a fourth year, previous first-term White House teams have dedicated little attention to the effort of preparing and circulating new executive actions for a fifth year.

Average number of executive orders by year in office for Clinton, W. Bush and Obama administrations



Successful planning for a second term—treating it with the importance of planning for a first term—can help second-term administrations avoid the pitfalls their predecessors experienced. As part of any planning, a dedicated effort on how to work with a challenging Congress is key to increasing the odds of legislative success in a fifth term.

Reason 2: White House officials and agency leaders are too busy dealing with the day-to-day challenges of running the government to focus on long-term planning

Some previous administrations have convened working groups of senior officials for meetings or retreats to devise second-term plans. But these senior officials were already managing the details of the president's daily schedule and responding to domestic and international crises.

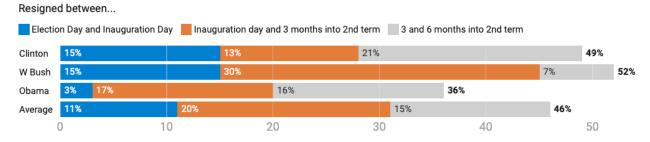
Asking senior officials to spend time on long-term planning is incredibly difficult on top of their already packed schedules and responsibilities. The best—and probably only—way to ensure an effective second-term plan is to designate a dedicated group of trusted leaders to focus solely on planning for a second term.

Reason 3: A second-term administration can offer continuity for top personnel and inject fresh energy where needed

For the last three two-term presidents, an <u>average of 46% of their top Senate-confirmed officials</u> serving on Election Day left their jobs within the first six months of the second terms. Administrations should seek to avoid unnecessary turnover, especially considering the <u>growing challenges</u> of the Senate confirmation process.

Incumbent administrations should take steps to retain the energy and experience of current appointees through opportunities for advancement, identify where personnel changes are truly necessary and keep working to fill important vacancies quickly to avoid fifth-year delays in policy implementation.

Percent of top Senate-confirmed appointees who resigned near the start of the second term



Appointments at the levels of secretary, deputy secretary and undersecretary. Appointees were included if they were nominated by the sitting president and were confirmed prior to the second Election Day. Appointees who moved from one Senate-confirmed position to another position in government were considered resignations.

Reason 4: A second term is an opportunity to learn from the first term and reset practices

A sitting president has a distinct advantage over those preparing for a first term: a track record to learn from as well as experience dealing with external challenges. Are the decision-making processes as efficient as they could be? Could any processes be streamlined? Would changing aspects of external engagement do more to build support?

Four years of dedicated experience allows an administration to learn from and improve upon the management practices of the first term. A trusted group can offer an honest appraisal of the processes that worked and help the administration pinpoint areas most in need of a second-term focus.

Reason 5: Winning re-election represents a new mandate from and for the public

Once the election results are final, a re-election victory suggests approval from the public on first-term achievements and endorsement for new campaign promises. Much like a first-term candidate should establish a transition planning operation to enact those promises, a second-term president should be prepared—before Inauguration Day—with implementation plans to enact what the public has endorsed.

This mandate from the public demands dedicated attention to fulfill. A planning team can help a second-term president prepare to deal with additional complexity: the external environment will have changed in four years. The political and legislative landscape will be different and a second-term president must recalibrate priorities and deliver in new ways.

As a veteran of three Republican transition teams, Chris Liddell wrote, "Year Four is a perfect time to reflect on the progress toward the legacy and reset the goals. Most substantial change takes two presidential terms to achieve and lock in. Based on the performance of the first term...aspirations can be raised even higher for a second term, and a lasting legacy will be constructed."

By following these recommendations, administrations can learn from and build on their accomplishments of the first term while preparing for the challenges that they will face during their second term.

^{1.} Chris Liddell, "Year Zero: The Five Year Presidency," University of Virginia Press, 2024, 101.



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Chapter 2: Creating a Second-Term Planning Team

A second-term planning team could be structured in many different ways. Those planning for such a team should consider the following issues:

An effective STEP team requires a mandate from highest levels of the administration

Because the second-term transition process has no legal mandate for the sitting White House to set aside specific resources, it is critical that the planning team receive a mandate from the president, vice president or White House chief of staff. This directive will not only empower the team but also provide direction about priorities. The endorsement by the White House will encourage federal entities to work with the team and provide the necessary access to information. It also signals to all stakeholders the administration's commitment to leveraging the second term for major progress.

Timing for second-term planning work

For a second-term administration to hit the ground running, it should begin early in the election year to engage in four key stages to prepare:

Fall Ramp Up	Post-election	Post-inauguration
Sept. – Election Day	Election - Jan. 20	Jan. 21 Onward
 Day after election action plan finalized with accountable personnel designated Initial PPO conversations to determine likely leadership vacancies at the White House and agencies Designate acting officials for senior level vacancies Complete an internal retrospective of first-term policy process 	 Execute 75-day assessment plan Submit nominations for all senior-level vacancies Begin leadership transitions and install acting officials as needed Finalize budget proposal and incorporate campaign 	 Begin implementing year five agenda Fold second-term planning staff into ongoing government operations Continue to fill vacancies for openings Hold leadership retreats for agency teams as new appointees are onboarded Execute policy goals
	Sept Election Day Day after election action plan finalized with accountable personnel designated Initial PPO conversations to determine likely leadership vacancies at the White House and agencies Designate acting officials for senior level vacancies Complete an internal retrospective of first-	Day after election action plan finalized with accountable personnel designated Initial PPO conversations to determine likely leadership vacancies at the White House and agencies Designate acting officials for senior level vacancies Complete an internal retrospective of first-term policy process Execute 75- day assessment plan Submit nominations for all senior-level vacancies Begin leadership transitions and install acting officials as needed Finalize budget proposal and incorporate

Team composition and White House oversight

The Second Term Evaluation and Planning team could be assembled as an outside and standalone operation, like a first-term transition team; as a distinct team within the White House; or a hybrid. Each of the models has their own benefits and challenges.

Potential models for a STEP team				
	Fully internal team within the EOP	Internal leadership with outside support	Fully external operations	
Overview	 Planning led by select White House staff, adding to their day- to-day responsibilities 	Joint effort with White House leadership supported by outside volunteers and special government employees	Outside 501(c)(4) organization established to conduct planning efforts	
Benefits	Allows for direct management of execution and planning activities	 Allows for close White House oversight Provides dedicated planning capacity Avoids complications of establishing an outside organization 	 Creates a more robust planning structure similar to first-term transition efforts Allows for fully dedicated, paid staff to focus on transition planning 	
Risks & considerations	 Planning may become a low priority for staff Staff may be planning for their own departures or focusing on other tasks 	 White House leadership will still be focused on their primary roles and will face distractions May have difficultly bringing in outside support without devoted funding 	Requires establishing a new legal organization and fundraising	

Regardless of how the team is ultimately structured, the STEP team should be made up of high-performing staff and advisors trusted by the president and include experts in management, policy and administration. The White House should consider whether some experts from outside the government, including alumni of the current or previous administrations, could bring new insights. Some agencies have found success using external experts brought on as special government employees, consultants or under nongratuitous service agreements to help solve specific problems. External individuals may be

able to recommend lessons learned through clearer eyes than those with ongoing responsibility to manage the White House.

The team should be led by a senior leader who is familiar with both the president's goals and government operations, and have an authentic relationship with the president, such as a former White House chief of staff, Cabinet secretary or senior advisor.

The sitting White House chief of staff or a senior designee should serve on the STEP team in an advisory role to bring additional validation to the initiative and ensure proper coordination with the White House.

Key factors to consider when establishing a STEP team

Incumbent presidents have obligations for record-keeping, transparency and ethics that outside candidates do not. In creating a STEP team, an administration should consult with counsel to determine whether an external operation or internal team structure best accounts for these requirements. One option is to create a temporary office within the Executive Office of the President where the STEP team has access to direction and authority from the president or chief of staff, as well as existing technology and operational support.

Regardless of the model used, the White House and STEP team must stay aligned with the General Services Administration and Office of Management and Budget, which oversee the government's official transition activities.

The structure of the STEP team must account for factors including:



Competing power centers: The role of the STEP team must be clearly defined to avoid the potential for competing with the administration's policy planning and the re-election campaign. It should focus on management and implementation strategies only and defer to the sitting White House staff and campaign for policy direction and agenda-setting.



Presidential records requirements: Unlike a candidate outside government, the sitting president has obligations under the Presidential Records Act, which states that records created or received by the president as part of their duties are the property of the U.S. government. Counsel within the White House as well as the National Archives and Records Administration should advise on records requirements for a STEP team, whether established within the White House or as an outside group.



Security clearances: Reviewing and making recommendations for agency operations may require STEP team members to have or obtain security clearances. When standing up the team, the administration should set expectations about what level of access the team will need and factor those timelines into personnel planning.



Agency access: Similarly, the administration will need to consider how to facilitate access to agencies.



Transparency: Any outsiders brought on to advise government agencies may be subject to the Federal Advisory Committee Act or other requirements for public access. Additionally, a group established within the White House should comply with norms and traditions around transparency for White House activities.



Compensation: Setting up a STEP team within the White House may require hiring of temporary employees or the enlistment of detailees from federal agencies. Requesting advisory support from outside the White House may offer different flexibility for volunteer status. Counsel should advise on the best structure to comply with the requirements associated with any employment status, including:

- Will government alumni and outside experts serve as volunteers? If not, under what hiring authority will they serve?
- If outstanding appointees are detailed from other federal roles, are others prepared to fulfill their agency responsibilities on an acting basis?



Technology and operational logistics: The group will likely require office space, devices and infrastructure for email accounts and shared files. Each potential source for that logistical support—whether within the White House or a federal agency—will create different requirements.



Operational costs: Like the issue of transition team compensation, the administration should also consider how the work will be funded. Depending on the official standing of the team members, transition work may fall under the budget and supervision of the White House. The Presidential Transition Act does not allocate transition funding for an incumbent administration, so financial support for this effort will need to be drawn from elsewhere in the budget.

Regardless of how the STEP team is established, it can only succeed with the time, space and mandate to manage second-term planning exclusively.



Photo credits: Motionarray

Chapter 3: The Role of the Second-Term Planning Team

The first 100 days set the tone for a president's second term, and the administration must be ready to hit the ground running. The transition team should focus on preparing for this period by identifying the best opportunities for the administration to achieve its goals through legislation, strategic partnerships, and management and budget policies.

A STEP team will mimic many of the duties of a <u>first-term transition team</u>, including personnel support and the development of implementation plans for the first hundred days. Like a first-term transition team, its work should operate in parallel with, but separate from, the campaign. Campaign leadership will run on policy priorities and proposals, which should guide the transition team's work. The STEP operation is not a policy shop. Instead, it should offer policy implementation options that the future administration could use to achieve the campaign's goals.

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The shift to a second term allows a transition team to build on practices that worked well during the first four years and find areas to improve in the second four years. The STEP team should be given access to review organizational charts and workflows across the White House and agencies. Ultimately, it should offer two types of support: first, an analysis of first-term successes and lessons learned; and second, a menu of management and policy implementation recommendations to enact the agenda dictated by the White House and the campaign.

To fulfill its mission, the transition team should engage in the following activities:

Determine goals and work backwards

The first priority for the STEP team should be to coordinate with the White House to determine its goals, mission and timetable. What processes and decisions should be made by Election Day and by a second inauguration? Like a transition team planning for a first term, the STEP team should have a clear mandate from leadership. The STEP team may be effective in helping think about personnel retention, policy planning, decision-making processes or other important management priorities.

The STEP team will be of most value if it is able to start early and has a clear expectation about its goals and timetable.

Review first-term management and implementation

To offer credible and realistic recommendations for a second term, the STEP team must gain a full picture of management and policy implementation in the first term. This process can be modeled off a <u>first-term agency review team</u>. An expert affiliated with the STEP team, perhaps a trusted official who has departed the administration, can review decision-making processes and coordination mechanisms, and make recommendations on new roles or governance structures to improve upon existing efforts. The White House can use required transition processes to support checkpoint briefings with agency leadership.

By law, agencies must create comprehensive resources and briefings ahead of every presidential election in case a new administration wins the election and takes over the White House. During years when an incumbent wins re-election, these resources often go unread and unused. Instead, these briefings can be a foundation to discuss how agencies can best advance the president's second-term priorities and campaign promises.

The memos created by White House offices, like the policy councils and task forces, in the last year of a first term could also provide critical information for the STEP team's recommendations. After leaving office, President George W. Bush's national security advisor, Stephen Hadley, obtained declassification of the memos written by the National Security Council staff under his watch in 2008. In 2023, Hadley published an assessment of whether the actions and advice in those memos had adequately prepared the next president for the challenges facing the U.S. government.² As part of its work in the last year of a first term, one role for the STEP team could be to use the memos prepared by White House offices to complement the information provided by agency briefings and provide a full picture of recommendations for a second term.

Review personnel and prepare for appointee turnover

An incumbent president has the opportunity to create substantial continuity in leadership across federal departments and agencies. Furthermore, the existing political leadership team in place has had the opportunity to build trust with an empowered and engaged career workforce and nurture strong connections between the two at every agency.

However, all recent two-term administrations faced significant turnover among top-level White House personnel and other high-level positions between their first and second term. The months leading up to re-election can be <u>particularly exhausting</u> for agency leaders as they race to complete priorities, prepare for the possibility of transition and manage surprises and crises. On average, <u>nearly half of top agency leaders</u> resign within six months of a second term's start. In the last three two-term administrations, 76% of the top Senate-confirmed political appointees served for <u>less than four years</u>, with an average tenure of three years.

On average, nearly half of top agency leaders resign within six months of a second term's start. In the last three two-term administrations, 76% of the top Senate-confirmed political appointees served for less than four years, with an average tenure of three years.

Some recent administrations have adopted a norm that all political appointees should not expect reappointment at the start of the second term and should therefore tender a

² Stephen J. Hadley (ed.), "Hand-Off: The Foreign Policy George W. Bush Passed to Barack Obama," Rowman & Littlefield, 2023.

resignation. There are no official rules requiring such letters. Those administrations chose this strategy to allow a president to nominate new individuals for roles in which they would like to see turnover without having the difficult conversation of asking for a resignation.

The Obama administration was deliberate about evaluating and retaining personnel as they approached re-election. During the summer of 2012, the Office of Presidential Personnel, agency leadership and White House liaisons reviewed political appointees to identify top performers, places where changes should be made and how to keep top performers engaged. White House liaisons worked with agency leadership to incentivize appointees to stay while building a culture where experienced appointees could request new placements.

Early work on replacement nominees will ease the turnover process later on. For example, because the Obama administration knew Treasury Secretary Timothy Geithner intended to leave early in 2013, they were able to announce a replacement nomination with his resignation. The president also asked Deputy Secretary Neal Wolin to stay on for an additional six months to ease the transition process.

High turnover and the resulting loss of institutional knowledge can force new appointees to relearn the lessons of previous occupants and risk slowing down implementation efforts. A STEP team can help an incumbent administration manage the balance between injecting fresh energy where appropriate and retaining experienced leadership.

Partner with the Office of Presidential Personnel and agencies to retain top appointees

Many political appointees admit to exhaustion at the end of a first term, but there are at least three reasons that administration leaders should take deliberate steps to retain top performers. First, current leaders have up-to-date knowledge about the challenges facing their agency and can get off to a fast start. Second, existing leaders have developed relationships and trust with senior career executives that are necessary to manage agency business well. Third, the increasing delays in the Senate confirmation process make it even more difficult to fill vacancies in a second term.

The White House should direct and empower Cabinet secretaries to organize such outreach and coordinate with the Office of Presidential Personnel on how to keep top performers engaged, whether in their current roles or more senior ones. PPO can also offer

high-performing appointees opportunities to move between agencies to keep them engaged. Re-election campaign staff may also wish to take on roles in the administration post-election and should be considered in the lists of those up for promotion or reassignment.

Reasons administration leaders should take steps to retain top performers:

- Current leaders have up-to-date knowledge about the challenges facing their agency.
- Existing leaders have developed relationships and trust with senior career executives that are necessary to manage agency business well.
- The increasing delays in the Senate confirmation process make it even more difficult to fill vacancies in a second term.

Maintaining direct contact with agency leadership is vital to this process. Many political appointee positions fall within Cabinet agencies and subcomponents, and agency leaders are best positioned to have conversations with individual appointees about continuing in the administration for a second term. The STEP team can support this work by organizing feedback from agency leaders about retention opportunities. It will be important for White House sponsors to set the tone that the STEP team exists to support a strong team across government without regard to STEP members' personal placement in a second term.

A STEP team can help an already busy personnel office handle the inevitable surge in turnover around re-election. In addition to organizing feedback from agencies, the STEP team can provide additional capacity to PPO in organizing opportunities to move personnel across agencies or supporting efforts to vet new appointees.

In the last transition cycle, congressional appropriators recommended an additional amount of funding for PPO to help recruit, vet and nominate candidates for senior positions. This led to surge funding for PPO that increased its capacity in 2021. The Partnership recommends that Congress continue this approach for 2025 and future transition cycles, and such funding should be available to new and second-term administrations alike. Even absent that additional support, a STEP team can help organize feedback from departments and agencies or support vetting for new candidates.

Under the Presidential Transition Act, funds provided by Congress for appointee orientation are available even to a re-elected incumbent. In recent transition cycles, Congress has provided \$1 million in appointee orientation funds.

More information on the appointment process can be found in the <u>Presidential Transition</u> <u>Guide</u> produced by the Partnership and BCG. The Partnership's "<u>Ready To</u>" resources can also help appointees prepare for their new roles and <u>execute</u> them responsibly.

Prepare signature legislation to prioritize for bipartisan support

The weeks following a re-election victory may provide an incumbent a boost in popularity. However, any such boost is likely to dissipate as history has shown recent second-term administrations have faced challenging political headwinds. Therefore, transition teams must plan to move quickly since the first weeks of a second term likely present the best possible opportunity for leading major bipartisan action.

Bipartisan cooperation is essential for any second-term president who hopes to leave a lasting legacy. An analysis by former Trump White House aide Chris Liddell found that few significant pieces of legislation have passed during a president's fifth year.³ A more hostile Congress—along with a lack of legislative planning during fourth years—have contributed to this legislative drought.

Bipartisan cooperation is difficult, especially in today's polarized environment. However, as Liddell and others have argued, bipartisan legislation can create a more lasting legacy than executive action alone. Furthermore, agenda items that can be addressed with quick executive actions have likely already been dealt with in the first term.

Build off the first-term President's Management Agenda to invest in improved government operations

During transition planning for a first term, a new president's team has invested the time and energy to define its management goals for the federal government, with the White House normally issuing its President's Management Agenda during the first year in office. After four years of managing the government, an incumbent team has a better understanding of the complex issues that require the elevation, focus and whole of government approach that a PMA provides.

³ Christopher P. Liddell, "Year Zero: The Five Year Presidency," University of Virginia Press, 2023, 180.

The planning phase for a second term is an ideal time to take a close look at the successes from the first PMA and prioritize what issues require cross-agency coordination and attention from senior leaders. A PMA provides a mechanism for agencies to work across barriers to tackle challenges in a transparent and accountable way.

Leaders of a second-term planning team should seize this opportunity to refine the goals, activities and reporting mechanisms. Because they have the benefit of being able to assess how the agenda was enacted during the first term, they can build on that work to make a second term even stronger. Broadly speaking, a <u>management agenda</u> should do the following:



Link management priorities such as IT, data and workforce modernization to the successful execution of policy objectives.



Recognize management experience as a key requirement in selecting appointees.



Strengthen the capacity of the federal government to achieve mission objectives.



Promote interagency collaboration, especially through established forums such as the President's Management Council.



Encourage innovation to improve outcomes and productivity, including new ways of doing business, greater use of technology and delivering better customer experiences.



Articulate a defined approach to decision-making within agencies and between agencies and the White House that covers routine decisions, new initiatives and unanticipated events.



Reduce the risk of operational and policy implementation failures.

Identify new partnership opportunities to achieve policy goals

Each modern White House is organized to build relationships with state, local and tribal governments; Congress; interest and affinity groups; business coalitions and industry task forces; and other important interests. Changes in the external environment, such as new party control in Congress, can lead an administration to shift focus in how it builds support and implementation plans for its agenda. When explaining this strategic shift, one Obama official described their first term as focused on achievements in Congress—such as the passage of the Affordable Care Act—while the second-term team pivoted to expand planning efforts with state, local and tribal governments. That official credited senior administration staff for selecting personnel who understood how local priorities might align with the administration's agenda for its second term.

There are two main benefits to reviewing partnership opportunities in a second term. First, new engagement strategies can help an administration enact positive change without relying on uncertain action from Congress. Second, if a first-term administration can identify which strategies and methods of communications were most successful with certain external partners, it can extend those strategies across others and strengthen its overall engagement with groups representing the country broadly.

Support transition planning for potential change of administration

In addition to planning for a second term, an incumbent White House must fulfill its obligations to plan for a potential administration change. The foundation of a seamless transition is early and comprehensive planning, which is not only a best practice, but a <u>statutory requirement</u>. This requires the incumbent administration to prepare detailed agency briefing materials, ensure clear succession plans are in place and facilitate a smooth transfer of knowledge to a potential incoming administration. In addition to fulfilling the legal obligations and responsibilities for continuity to a new team, these materials can be used to evaluate first-term successes, determine where current programs stand and



Photo credits: Motionarray

Chapter 4: How the Executive Office of the President Can Implement Your Second-Term and Management Agenda

While the STEP team should provide the dedicated attention and capacity that second-term planning needs, after Inauguration Day it will fall to the Executive Office of the President staff to enact and execute a successful second term. Therefore, in addition to reporting to a senior official such as the White House chief of staff, the STEP team should also offer regular updates to a core group of White House senior staff.

Communication between the teams will help ensure that the management recommendations made by the STEP team have the support to be implemented by staff remaining through a second-term transition. This coordinated effort will help an incumbent president take advantage of the unique opportunity—given its up-to-date knowledge and experience—to invest in exceptional management of the federal government.

This chapter outlines the activities that senior White House staff can perform to support second-term planning and execute its recommendations.

Work with White House senior staff to finalize the agenda

During election years, previous presidents have convened White House senior staff in planning sessions to define the policy priorities for a second term. Such sessions continue to be critical because a combination of campaign leaders and senior White House staff define the vision, messages and policy direction that inform the re-election campaign.

Where the STEP team provides additional capacity is the creation of implementation plans to enact that agenda and build upon the lessons of the first term. Following re-election, the president and senior staff should review the transition team's recommendations against risk factors such as the individual dynamics of the current administration, staffing changes and election outcomes.

The president and top advisors should work together to combine the campaign's promises, ongoing efforts from the first term and recommendations from the STEP team to lay out a clear agenda for the second term. This agenda will then guide management policies and collaboration throughout the federal enterprise.

Empower Cabinet and agency leaders to build and execute plans

In managing the day-to-day operations of complex federal agencies, Cabinet leaders are essential sources of expertise. Their service in the first term has given them a close-up view of the internal challenges, modernization opportunities and potential policy initiatives that should be tackled in the next four years. The STEP team should work with Cabinet Affairs to solicit feedback from Cabinet leaders about new priorities and coordinate them with White House planning.

Though presidents have traditionally begun their administrations with commitments to "Cabinet government," many administrations underuse this valuable resource in subsequent years.⁴ During his first term, President Obama met with his full Cabinet just 19 times, while President Trump held 25 meetings during his four years in office. Robust communication during second-term planning will reduce any distance between the decision-makers in the White House and those in agencies. It also ensures that Cabinet and White House leaders are moving in lockstep.

⁴ Chris Liddell, "Year Zero: The Five Year Presidency," University of Virginia Press, 2024, 96.

Appoint mission and management coordinators

Major elements of a president's agenda often involve implementing new laws across multiple agencies. This was true with the COVID-19 vaccine development and deployment, the Bipartisan Infrastructure Law and the Infrastructure Investments and Jobs Act. Such complex interagency coordination requires a senior, empowered leader to drive action and resolve conflict. That "mission coordinator" can use policy councils for coordination.

What is less commonly understood is that a second term provides the opportunity for an experienced administration to invest in managing the government now that the re-election considerations and relative lack of experience in a first term are behind it. Just as important as the president's policy agenda is a management agenda to modernize, strengthen and reform key mission support functions that underpin the delivery and implementation of effective policy.

The GPRA Modernization Act of 2010—also known as GPRAMA—directs a president to consider management agenda goals covering a limited number of policy areas needing improvement. While the first-term PMA provides a starting place, those goals do not have to remain the same in a second term. New goals may be identified and embedded in the work of agencies. In considering the mission support functions in need of modernization and reform, the Government Accountability Office's High Risk List provides a potential roadmap for identifying priority areas.

Early planning for a second term management agenda should include reviewing current PMA goals for progress and alignment to an overall second-term policy agenda. This work should be led by the Office of Management and Budget's deputy director for management. This work could be furthered during the planning process through a small group of internal and external management experts.

Prepare appointments early to avoid delays in the Senate confirmation process

When it comes to filling positions that require Senate confirmation, administrations will face an increasingly difficult confirmation process. The average length of the Senate confirmation process increases with every successive administration. Officials confirmed during the first three years of the Biden administration took an average of 172 days. By contrast, confirmations during the corresponding period during the George W. Bush administration took less than half that time—just 84 days.

Average length to confirm Senate-confirmed political appointees through year three

All civilian positions except for federal judges, U.S. attorneys and U.S. mashals

	Average number of days	
W. Bush	84.4	
Obama	104.2	
Trump	152.8	
Biden	172.3	

Source: Data compiled by the Partnership for Public Services' Center for Presidential Transition from Congress.gov

Notes: Consists of all civillian positions excluding federal judges, U.S. attorneys and U.S. marshals. Data includes ambassadors. Data is through Dec. 31 of the president's third year. The confirmation process is defined as the time between a president sending a formal nomination to the Senate and the confirmation vote. Nominations that were returned and resubmitted soon after are combined, as are simultaneous nominations to related positions.

In the first year for new presidents, norms and goodwill help foster speedy confirmation for some top nominees—particularly Cabinet leaders. However, by the fifth year, the Senate may have less motivation to make things easy for the incumbent. Prompt action after reelection will prevent vacancies from dragging on throughout the term. These actions should include making sure PPO is adequately staffed during the transition, preparing to fill expected vacancies given the turnover at the beginning of second terms and incorporating lessons learned from the first term while filling Senate-confirmed positions.

Convene an early town hall meeting with career SES

The members of the career Senior Executive Service are the linchpin between the priorities of political leaders and the experience of the career civil service in confronting complex issues over time. The beginning of a second term is an important moment to reinforce that the career SES members are a crucial part of the president's team. To support this effort, the STEP team should help the White House plan for the president to host a large convening of the career SES early in the second term. Having a direct, personal meeting with this group reinforces their critical role in achieving the administration's priorities. This gesture may seem small, but prior presidents conducted gatherings like these to great effect. George H.W. Bush held multiple meetings like this with staff in each Cabinet agency, with the first one taking place just seven days into his presidency. George W. Bush also held one, as did Obama. Career SES leaders translate urgency and direction from the president and political appointees to the rest of the workforce, who in turn create concrete results for the public.

Use the president's fifth year budget proposal to drive priorities

Presidents must submit budget proposals for the upcoming fiscal year by the first Monday in February, which arrives quickly after re-election. Unlike a new administration, a second-term administration benefits greatly from its familiarity with the government's most pressing priorities. A second-term administration should capitalize on this huge advantage to release an on-time, detailed budget with clear ties to policy goals.

When beginning a first term, an incoming team has just a few short weeks in which to work with the outgoing administration to learn and modify their budget. Simultaneously, the new team is developing relationships with OMB career officials for the first time and relying on information from agency review teams to inform their new budget. Additionally, in a new administration, many Cabinet and agency leaders will likely not be confirmed by the time the budget is released, further limiting the budget team's visibility into the details of agency spending.

By contrast, second-term officials can work closely with trusted, familiar colleagues who have deep knowledge of their agencies' current operations and can begin the budget process far in advance of re-election. They can build on their own work done during the normal budgeting process and make adjustments based on re-election promises and priorities. Given their broad knowledge of government operations, OMB should be in close contact with the STEP team. The STEP team's analysis of the first term should look for

areas where resources can be saved, reallocated or increased to best support future policy implementation.

Whether the administration is starting a first term or a second, the president's budget is generally the first comprehensive policy document released after an election and should be treated as a powerful opportunity to signal the administration's priorities to Congress. The <u>budget section</u> of the Presidential Transition Guide offers more detailed guidance about this process.

Chapter 5: The Role of Agency Leaders in Second-Term Planning

Though much of this guide focuses on the tone and direction set by the White House, leaders across federal agencies are pivotal in preparing for second-term success. The traditional mindset for political appointees to "run through the tape" of a first term should evolve to "set up for new wins" in a second term. After four years at the helm of an agency, secretaries and their teams understand the roots of long-term challenges and have the tools and relationships to invest in solutions. Agency leaders can use an election year to create a year-five agenda to address opportunities that were unknown or hard to prioritize in the first term.

During a re-election year, political leaders at agencies can take the following steps to plan for a successful start to a second term. In doing so, they confront the real challenge that—as senior political leaders like themselves depart—new political leaders will arrive with their own mandate for strategic planning. This is one reason it is so important for the STEP team, like a first-term transition team, to be involved in planning for both personnel and policy. The STEP team can help create continuity between the plans developed by departing political leaders and the new leaders arriving to implement them.

Establish an internal review team

Much like the White House's STEP team organizes implementation plans for administration-wide priorities, agencies should conduct their own internal reviews and

planning. Each agency should identify an individual with an enterprise perspective on the agency's management challenges and policy opportunities who has the time and capacity to lead the review. Finding that combination may require asking a recently departed senior official, such as a deputy secretary or chief of staff, to return for a short period. That individual could designate a small team that will organize conversations with the agency's political appointees to inform retention planning; support office leads to review processes and create implementation plans; and consolidate feedback on new opportunities for a year-five focus.

Each agencies' internal review team should work closely with the main STEP team to engage in a give and take in which the agency team shares intel with the White House and follows its lead in setting priorities. The agency team's work "must plug into the White House effort," advised a former, high-ranking agency official. "If it isn't seen to be consistent with the president's priorities, it isn't anything." Another former agency official stated that even though an election serves as "an affirmation to keep going" with about 80% of ongoing objectives, a review of progress can identify opportunities for improvement.

As described in Chapter 3, the White House can use the required process for agencies to create resources and briefings ahead of every presidential election to conduct checkpoint briefings with agency leadership. Post-re-election, these briefings can be tailored to discuss how agencies can best advance the president's second-term priorities and campaign promises. Another useful tool is the president's budget request. Agency teams could base their evaluation and second-term planning on the previous year's budget because it already integrates agency input and White House approval.

The STEP team will need to establish a structure to align the work of agency teams with broader White House planning. The leader of the STEP team may want to identify an executive secretary or chief of staff to coordinate communications and workstreams between White House offices and agencies. Policy councils, such as the Domestic Policy Council, National Security Council and National Economic Council, can also provide a structure to handle coordination between these entities. Alternatively, the STEP team could work with the White House staff secretary's office to circulate memoranda to discuss and codify new priorities.

Tap into all sources of expertise

When reviewing the first term and preparing for the second, agency leaders should start with their internal political leadership and coordinate with relevant policy councils in the White House, but should not stop there. Internal career officials often have the deepest knowledge of their own policy and management areas and can help advise political officials about institutional improvements. Policy oversight experts from Capitol Hill, such as those serving on relevant committee staffs, also have expertise and can make recommendations. Intentionally seeking input from these sources will allow leadership to strengthen relationships and chart the best paths for the second term.

Plan agency leadership retreats

While there is traditional reluctance for an incumbent administration to plan post-inauguration activities before election results are known, Cabinet leaders should schedule ahead and reserve time to conduct internal agency leadership retreats. Ideally, personnel planning during the election year has led to retention among an agency's top ranks, complemented by selection of capable acting officials where necessary. This group will benefit from dedicated time in the first month of a second term to define the legacy achievements their agencies should complete over the next four years and spell out the roles, responsibilities, timelines and specific plans that each office will take to achieve those goals. These retreats should invite top political and career leaders to reinforce that they are a unified team with each person having an important role to play.

All agencies should hold at least one leadership retreat during the transition period, but secretaries should choose the time and format that best fits their risk tolerance, expected personnel turnover and agency culture. Below are considerations for retreat timing:

When should agencies hold a leadership retreat during the transition to a second term?			
Potential timing	Pros	Cons	
3-4 weeks pre-election	 Timing is early enough to help with pretransition planning. All staff will have been in office during the first term and can share hard-earned wisdom. Timing could reinforce resolve to finish the term strong. 	 Goals will be set by officials who may leave before executing them. Planning changes at this time risks impugning the work done by those in place. If leaked, it could appear to be presumptuous for the campaigning president. 	
Between the election and inauguration	 Allows collection of candid wisdom and advice before officials depart. An election win will provide political appointees with a morale boost. An election result would offer certainty to the entire administration about the path of the next four years, making planning easier. 	 Election results can create distractions for political officials post-election. This period will have a high rate of on- and offboarding, which could make planning difficult. Officials who have already declared their upcoming departures to their general counsels and are negotiating new job offers may require special consideration to participate. 	
Post- inauguration	 New leadership will have arrived with fresh energy and ideas for change. As the new term starts, the White House will be providing new directions. This timing allows agencies to respond and redirect accordingly. 	 Most exiting officials will likely be gone and will have taken their institutional knowledge and advice with them. High turnover and a slow confirmation process may mean that some roles, especially political ones, are vacant at this time. 	

Create plans to tackle necessary changes and major accomplishments that were difficult in a first term

The beginning of a first term can be a chaotic time, as new leaders set the groundwork to accomplish a new president's priorities, manage unexpected crises and establish their own footing. By the end of a first term, appointed agency leaders have a clear perspective on what they wish circumstances had allowed them to pursue. The potential for a second term is an opportunity to build internal and external support to introduce the big changes that an agency might need. New leadership should guide changes tactfully during this time to avoid impugning the work done by those that have been there.

During a fourth year, agencies or the Office of Management and Budget might hold issuance of certain regulations because Congressional Review Act requirements make regulations issued in the last six months before an election more vulnerable to reversal by a successor. Any priorities paused due to these considerations may be natural candidates for action early in a second term.

The start of a second term is also a good time for agency leaders to check on their agency's health and ensure that they will leave it better than they found it. What information technology systems require modernization? Do the management of grants, case management, procurement or hiring systems require consolidation or improvements? Where does the agency fall in the Best Places to Work rankings produced by the Partnership for Public Service and BCG? Issues like these are not flashy, but investing in improvements to government functions and service delivery are an important part of an administration's legacy.

Review and update decision-making processes

By its fourth year, each agency leadership team has a well-established cadence for everything from coordination calls among agency leaders; meetings to make progress on specific priorities; timelines and templates to prepare and review briefing material and decision papers; consultation for handling scheduling and speaking requests; and coordinating engagement with external stakeholders. In many cases, the cadence and format for these meetings has improved over time and has been tailored to meet the needs of current agency leaders. In other cases, some processes have become moribund or out of date. Agency leaders should empower officials such as chiefs of staff, executive

secretaries, and directors of scheduling and engagement to review processes in their purview, refresh meeting cadences and participation, and improve business and decision-making processes.

Partner with the Office of Presidential Personnel to fill vacancies

Intentional personnel planning at the end of the first term may still result in turnover and vacancies at the beginning of a second term. Agency leaders should partner with their White House liaison and general counsels to ensure that succession plans are up to date before the end of the first term and that first assistants and delegation orders are properly assigned and documented. These steps will help agency leaders best partner with PPO to name appropriate acting officials and quickly fill key vacancies.

Planning ahead is particularly crucial for Senate-confirmed positions, where confirmation delays could result in long-term vacancies, but it is also important for positions not requiring confirmation, such as noncareer members of the SES. Agencies should work to scout internal candidates for promotion or transfers, ensuring a strategic alignment of talents across the administration. The White House liaisons and STEP team play vital roles in facilitating these efforts, ensuring effective communication and coordination between the agencies and PPO.

Prepare designees to fill acting roles

While all administrations should aim to fill vacancies as swiftly as possible, confirmation timelines have <u>increasingly lengthened</u>, necessitating acting officials to quickly fill openings to maintain a functioning government. The STEP team should help agencies prepare for potential departures and identify people who can step into their temporary positions, ensuring continuity and stability. The Partnership for Public Service's "<u>Ready to Govern</u>" program provides a structured framework for this training, equipping acting officials with the necessary knowledge and skills to navigate the complexities of their interim roles.

Use surge hiring authorities to advance execution of priorities

<u>Surge hiring authority</u> can speed up the hiring process for agencies, allowing them to quickly hire subject matter experts to implement new legislation or complete the White House's priorities. Such authority can be used to respond to emergencies, staff attrition,

demand for new skills or to meet mission requirements of a new program or organization. Signature legislation passed during a first term—such as the Bipartisan Infrastructure Law—often includes hiring authorities to support the accomplishment of required work. Ensuring that agencies have deployed such authorities to their fullest extent is an important tool in cementing first-term progress.

The Partnership's 2020 report "Rapid Reinforcements" offers practical guidelines and case studies agency leaders can use to understand available options. Some possible authorities include the military spouse noncompetitive appointing authority, the returned Peace Corps volunteer noncompetitive eligibility authority, the reinstatement authority and direct hire authorities.

Many agencies <u>effectively used surge hiring</u> in response to the COVID-19 pandemic. For example, the Department of Health and Human Services used additional incentives to attract employees, such as flexible schedules and training programs. To facilitate its surge hiring efforts, the Department of Veterans Affairs changed how it conducted onboarding by delaying certain parts of the credentialing process such as fingerprinting or drug testing until after an employee started work and allowing employees to start during a mid-pay period.

Advance the next generation of leaders

A transition to a second term is a good time to review whether high-performing staff early in their career are ready to move to larger roles. Traditionally, the White House holds sway over senior-level personnel decisions, but are more willing to defer to agencies' input at junior levels. Agency leaders should evaluate their current personnel and promote talented junior staff who are ready for larger roles.

Research shows that Gen Z employees—those born between 1997 and 2012—value opportunities for career growth and may be motivated by increased mentorship and advancement opportunities. With coordination through the STEP team, agency leaders should reward these employees with new opportunities in their agency or elsewhere to build a strong bench of next generation leaders.

Conclusion

The transition from a fourth year to a potential fifth represents a particularly complex and sensitive time for a presidency. The president must simultaneously run for re-election, manage daily crises of governing, follow legal requirements to prepare for a potential successor and plan for a second act in case of a win. For most recent presidents seeking re-election, this final task has taken a backseat to other pressing priorities.

However, overlooking second-term planning deprives an administration of a powerful tool. A second term presents a natural opportunity for an administration to reset and create a plan to achieve concrete goals and build a lasting legacy. By working closely with senior leaders and building upon the successes of a first term, an administration can head into its fifth year with renewed drive and energy.

Armed with personal and institutional experience, a re-elected president could get more done in a second term than the first. With strategic preparation, leaders can make their second term even more impactful than the last.

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