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MAKING AN IMPACT:  
YOUR OPPORTUNITY AS A  
FEDERAL LEADER

# A Guide For Incoming Cabinet Deputy Secretaries

As the deputy secretary, you are pivotal to your department's success and your role offers the biggest opportunity to spur lasting change across government. You serve the organization's mission by leading high-profile initiatives, being the senior liaison to a wide range of stakeholders, convening key decision-makers across the department—including the agency heads—and acting as the alter ego for the secretary. You work with your counterparts in other agencies to implement the administration's policy priorities and management agenda, and as the chief operating officer, you are responsible for aligning the agency's mission with its critical management and support functions.

This guide outlines best practices that you, as deputy secretaries, should follow to increase your impact, focusing on key people, issues and stakeholders. It was informed by insights from former deputy secretaries and other senior federal leaders.

# 1. Staying Aligned on Vision and Strategy, and Developing Your Leadership Team

From day one, you will help shape the administration's and your secretary's vision and priorities for your agency. There will be key relationships for you to establish in your first few weeks, and you will deal with important, urgent and often unforeseen matters that will affect how you spend your time and energy. You are also one of the main political advisors to the secretary and will be involved in the major decisions that affect the department. And it is likely you will be called on to respond to a crisis or help implement a high-profile government initiative.

## BEST PRACTICES

- » **Clarify expectations and responsibilities with your secretary.** This is your most important relationship and will mature over time. The effectiveness of your relationship with the secretary will set the tone for how you interact with senior staff, agency heads, regional offices and the secretary's key advisors. For example, while you may disagree on a decision in private, it is important to show a united front to the rest of the department. Therefore, it is critical you understand what is expected of you from the beginning. Suggested discussion items to prioritize for your first meeting(s) are in **Figure 1**.
- » **Foster a culture of leadership.** Encourage your agency leaders to meet with their leadership teams, including career executives, to establish and reinforce a shared vision and values, and craft clear and concise messages communicating organizational vision and values to the workforce.
- » **Build a cohesive team.** Having political and career staff working together to advance your priorities is a unique characteristic of the federal workforce. Managing this dynamic effectively will help you build a strong team.
  - Seek insights from the agency's senior political leadership team as well as senior career executives when possible, to inform how you build support for the administration's and secretary's priorities.
  - Outline your expectations for your direct reports and the respective roles, procedures and responsibilities of your front office staff.

### FIGURE 1: ITEMS FOR THE DEPUTY SECRETARY TO DISCUSS WITH THE SECRETARY

- How your role aligns with the secretary's and the areas you will have responsibility for, e.g., the extent of your involvement in the department's policymaking process
- How you will communicate with each other and other trusted personnel, e.g., the secretary's senior advisors, front office, chief of staff and your principal assistant
- Which internal and external stakeholder relationships you will oversee, and the meetings you will attend
- Your approach to briefings with the White House and on Capitol Hill that you and/or your secretary will attend
- Decisions on urgent issues such as critical inspector general and Government Accountability Office investigations requiring action, and items on the GAO high-risk list
- The status of and plans for filling vacant political positions
- Major issues that provide opportunities for cross-agency collaboration, and existing initiatives and resources that support an enterprise approach

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<sup>1</sup> Mark Abramson and Paul Lawrence, "The Deputy Secretary: Linchpin to making Government Work," Feb. 2021. Available at <https://bit.ly/3b86CXR>.

- » **Connect with deputy secretaries who served in your role previously.** Ask them about the challenges they faced, especially those unique to your department, how they approached discussions with the secretary about their role as the COO, and how they built productive working relationships with career staff.
  
- » **Prepare for the unexpected.** The deputy secretary often serves as the point person for managing through times of crisis.<sup>1</sup> You may be required to respond to reporters and attend White House briefings or speak at external events. You may also have to address urgent issues and adverse publicity and stand in for the secretary when asked to do so.
  - Set up tabletop exercises for strengthening crisis response capabilities. Such exercises should include crisis communications with the White House, Congress and the media.

## 2. Investing in Your Workforce and Engaging Key Stakeholders

To be able to execute your policy agenda, you need capable, trusted leaders and a qualified, dedicated team. By investing in your agency's workforce—whether it be improving employee engagement, building new pipelines of talent or providing other opportunities for growth— you will be better equipped to address obstacles and deliver positive outcomes for the American people. Your success in advancing the department's priorities and mission will also depend in part on your ability to work effectively with the White House, the Office of Management and Budget and other stakeholders. And many deputy secretaries are selected for their relationships with constituencies outside of government.<sup>2</sup> You will also act as a "convener" of leaders within your own department, across other agencies and from other governments.

### 2024 Survey on the State of Public Trust in Government

Ninety-one percent of Americans agree that "Having competent civil servants is important for having a strong American democracy. Simultaneously, two-thirds of the public agree the government at present is "incompetent."

<sup>3</sup>Partnership for Public Service, "The State of Public Trust in Government 2024," 2024. Available at <https://bit.ly/4feWagp>

### BEST PRACTICES

- » **Establish trust and rapport with career leaders.** Career executives have significant institutional knowledge of their agencies, crucial for helping you deliver on your agency's policies, programs and mission. Many career officials will be acting in critical leadership positions while new political appointees are being confirmed. These officials can help accelerate your understanding of:
  - Formal and informal organizational structures and relationships in the agency and across government, including with Capitol Hill and the media
  - Significant legislation, litigation and other hot topics that may require your response
  - Key stakeholders and interest groups you will need to contact
- » **Communicate across the department early and often.** When you make it a priority to learn about your agency's core business, how the organization is structured and operates, and who its stakeholders are, you build rapport with the teams that carry out the policies and programs. This support is essential for when you must make difficult or unpopular decisions.
  - Introduce yourself by email or a video message to the entire agency. Include your background, leadership vision and what you hope to achieve in your first 100 days.
  - Establish a visible presence—whether in person or virtually—especially with individuals who will have an effect on your ability to serve the secretary, the mission and the organization.
  - Work with the secretary to establish a calendar of internal town halls with the goal of quickly establishing significant two-way interaction opportunities with the full department.
- » **Set a timetable for visiting regional offices.** Make personal visits or use virtual engagement options that will make it easier to meet a larger number of staff members more quickly, especially given that the majority of federal employees are based outside of Washington, D.C. Take advantage of the opportunity to learn about staff members' programs and how they connect to and support the agency and the administration's priorities.

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<sup>2</sup>Ibid.

- Familiarize yourself with the key agency operational responsibilities and career staff who have specialized technical or organizational skills, or financial knowledge. Consider the opportunity to detail career staff on a rotational basis to assist appointed officials in specialized areas.
- » **Commit to making improvements to employee engagement and retention.** Ask your leadership team, in partnership with your chief human capital officer, to use the annual Federal Employee Viewpoint Survey and the Best Places to Work in the Federal Government® rankings to identify and address top employee concerns.
    - Create career growth opportunities to help build a cohesive team by thoughtfully establishing rotational opportunities for both career and appointed staff. Short-term task forces and other assignments can also be used to expand expertise within the department.
- » **Get to know the organizations at the “center of government” and establish trusting relationships with personnel,** including White House senior advisors and Office of Management and Budget officials and career staff. They will help you to advance the agency’s and the secretary’s agenda.
    - You may discuss issues to be covered at your first President’s Management Council meeting, including performance insights about your agency priorities, programs and systems, how OMB budget and management branches will coordinate issues affecting your agency, and concerns regarding immediate and future budget priorities.
    - You may meet regularly with the Office of Cabinet Affairs so you can better understand issues of interest or concern to the White House and advise the secretary about how to respond to them.
- » **Meet with your department’s inspector general.** This will give you better insight into the issues the IG identifies as a high priority, This will give you better insight into the issues the IG identifies as high priority, and how they might be addressed, which is relevant to your responsibilities. Coordinate this meeting with your secretary, who may already have met with the IG (see A Guide for Incoming Cabinet Secretaries).
- » **Meet with your department’s general counsel.** Building a strong and effective working relationship with the general counsel will enable you to advise the secretary about “sleeper” issues that may need to be addressed in the future and help you avoid any surprises. The general counsel will also advise you on any ethical issues.
- » **Prepare to meet with other stakeholders who impact the department’s mission, policies and programs.** As alter ego to the secretary, you will work with external stakeholders involved in the issues for which you have responsibility. Depending on your department’s mission, these stakeholders will include business leaders; non-governmental entities; media organizations; interest groups and associations; union leaders; leaders from other agencies; state, local and tribal governments; and foreign dignitaries and diplomats.
- » **Familiarize yourself with key congressional players and committees, and the legislative landscape.** Meet with your agency’s legislative and congressional affairs team which can brief you on the views of congressional committee members, public affairs staff and IG overseers on issues relevant to your areas of responsibility.

### 3. Building Strong Management Practices

While much of the chief operating officer role is described in law, each leader tailors the role based on the skills, experience and personality of the secretary or you, the deputy secretary, since you also serve as the chief operating officer. As the agency's chief operating officer, it is imperative that you understand the key agency workforce, technology, acquisition, finance and other issues that will need to be addressed immediately and throughout your tenure. Establishing a regular schedule of meetings with your management officials will help deepen your understanding of agency program performance, mission priorities, risk management and operations. Without strong management practices, your agency will not be able to deliver on its priorities and meet the needs of the public.

#### BEST PRACTICES

- » **Meet with your chief management official.** Discuss the department's management and operational responsibilities with this executive, who may also be referred to as the undersecretary for management, assistant secretary for administration and management, or chief management officer.
  - Set expectations for data-driven management and decision-making.
  - Determine how you will assess the agency's capabilities and divisions; this assessment should cover security, procurement, budget execution, strategic planning and performance management.
  - Establish a corporate-level, risk-management system to validate and analyze performance data; develop plans to manage the risks identified.
  - Discuss the development of performance management systems so they align with and inform decision-making.
  
- » **Establish a regular meeting schedule with your senior management team.** Your C-suite can brief you on the key technology, data, acquisition and procurement, budget and finance, and human capital topics that you may need to address. Below are issues to discuss with the leaders in these meetings.

#### TECHNOLOGY

**Chief Information Officer, Chief Technology Officer and Chief Information Security Officer**

- Status of cybersecurity systems and programs in the agency and its divisions, and opportunities to drive change
- How IT is organized across the agency, IT spending, staffing and performance issues
- The department's performance under the Federal Information Technology Acquisition Reform Act

#### DATA AND EVALUATION

**Chief Data Officer and Senior Evaluation Official**

- Collaborative efforts to improve governance and operational effectiveness
- Results of quarterly data-driven reviews of the department's performance goals and cross-agency priority goals
- Data to assess the performance of key functions and improve performance and programs

#### ACQUISITION AND PROCUREMENT

**Chief Acquisition Officer and Chief Procurement Officer**

- Organization of acquisition and procurement in the department and its subcomponents
- Major departmental contracts and issues, including any documented protests, past ethics concerns or risk exposure
- Major contracts up for renewal in your first six months

#### FINANCE AND BUDGET

**Chief Financial Officer**

- Impact of the current fiscal year budget and pandemic relief efforts on the agency's priorities and core business
- Status of the future fiscal year budget request, including discretionary funding for key priorities
- Other critical and immediate budget-related decisions e.g., about the status of audits, and any significant shortfalls
- Status of governance of the working capital fund, where applicable, and if it is adequate to support agency operations

#### HUMAN CAPITAL

**Chief Human Capital Officer**

- Talent profile including the most recent request to OPM for additional SES positions, recruitment strategies, SES vacancies and rotation plans
- Demographics of all federal agency and contract staff, e.g., retirement eligibility, workforce differences and location
- How the HR team is organized across the department and its subcomponents
- Workforce and succession plans, employee engagement scores, and other indicators, e.g., attrition and skill gaps

- » You should also meet with the **secretary, assistant secretary for congressional affairs and senior OMB budget team** as part of your ongoing efforts to familiarize yourself with the budget and your role in addressing any immediate issues. While this may require a significant amount of time when you first begin, it is critical for shaping what the agency can and cannot do over the course of the administration.
  
- » **Use the President's Management Council to improve management challenges at your agency and across government.** Your role as a council member will help you to connect regularly with your peers to implement cross-agency government-wide priorities and address interagency conflicts. You will also advise the president and OMB on government reform initiatives, including those in the president's management agenda.

“Many management challenges, such as improving customer service or preventing cyber-attacks, cross traditional agency boundaries and cannot be solved by individual agencies. These challenges require a government-wide approach... To improve interagency collaboration, COOs serve on the President's Management Council and help execute the president's management agenda.”<sup>3</sup>

<sup>3</sup> *Partnership for Public Service and Booz Allen Hamilton, “Bridging Mission and Management: A Survey of Government Chief Operating Officers,” June 2015. Available at <https://bit.ly/3qY1mvy>*

## 4. Actions for Leadership, Management and Personnel Matters

### **LEADERSHIP AND STRATEGIC MATTERS THAT WILL REQUIRE YOUR ATTENTION:**

- Key decisions with the secretary, chief of staff and senior advisors
- Major program and policy initiatives from the previous administration that are at stages of critical implementation
- Congressional hearings, legislative proposals and significant budget issues you may need to defend
- Expectations that you will represent the secretary when needed—for example, at high-level meetings with the White House, at gatherings with key stakeholders, at internal events with staff and at public events
- Direction from and interactions with the White House
- Your COO duties, which you will work with your secretary on establishing
- The work of your “front office,” which will be developed with the help of the secretary’s chief of staff and your chief of staff

### **MANAGEMENT AND OPERATIONAL MATTERS THAT WILL REQUIRE YOUR ATTENTION:**

- Your understanding of governance processes in your agency and any clarifications you may need
- Major mission-support challenges in administrative functions such as budget, finance and HR systems; acquisition and procurement processes; or IT, workforce and HR issues, including performance shortfalls and results from employee engagement surveys
- Budgets and their effect on your agency’s priorities and performance
- Your agency’s strategic plan and performance metrics measuring progress against stated outcomes, including relevant cross-agency priority goals
- Major media stories or posts on social media that may need an official response
- Pending inspector general and other investigations, HR and union issues, and Government Accountability Office reports
- The status of major acquisitions or their implementation that may come under IG or congressional scrutiny regarding cost, schedule and functionality
- Regulations that spark interest from stakeholder groups and the media
- Major court cases affecting the agency, directly or indirectly

### **TALENT, PERSONNEL AND EMPLOYEE ENGAGEMENT MATTERS THAT WILL REQUIRE YOUR ATTENTION:**

- Senior career executives in critical positions
- Hiring and retention data to focus on recruiting and retaining a new generation to serve in critical roles or understaffed offices
- The Office of Presidential Personnel staff as you assemble your team of political appointees, in coordination with your secretary, chief of staff and the White House liaison, who will keep you connected on a day-to-day basis
- White House senior staff, including the chief of staff and senior advisors
- Stakeholders such as business leaders, interest groups and associations
- Your personal office staff, senior advisors and direct reports, such as your principal assistant; chief financial, human capital, technology and information officers; and assistant secretaries for program areas
- Results of critical engagement surveys including the annual Federal Employee Viewpoint Survey and the Best Places to Work in the Federal Government®



# Leadership and Agency-Specific Resources

## LEADERSHIP AND ONBOARDING RESOURCES

- [Guide for Incoming Cabinet Secretaries](#). Outlines best practices to build an effective team, advance the administration's agenda and work effectively with key stakeholders
- [Guide for Incoming Assistant Secretaries for Administration and Management](#). Lists key actions new ASAMs can take to accelerate their impact during their first month on the job
- [Political Appointee Tracker](#). A website created by the Partnership for Public Service and The Washington Post that is dedicated to tracking more than 800 key executive branch positions
- [Ready to Govern](#). Sessions for new political appointees to accelerate their impact and connect with other federal leaders on priority topics including navigating the federal budget, hiring, navigating the federal budget, hiring, and managing talent and stakeholders
- [Transition Lab Podcast](#). A podcast series from the Center for Presidential Transition that gives a behind-the-scenes look at presidential transitions
- [Advice to Incoming Agency Leaders From Those Who Have Been There](#). A 2023 report from the Center for Presidential Transition featuring best practices and lessons learned from former leaders

## BEST PLACES TO WORK IN THE FEDERAL GOVERNMENT®

- [Overview and Agency Rankings](#). Employee engagement rankings government-wide and at individual departments, agencies and subcomponents based on the annual Federal Employee Viewpoint Survey

## AGENCY DASHBOARDS

- [Agency Performance Dashboards](#). An overview of the mission, workforce, employee experience, budgetary resources and information-technology maturity of 33 major federal agencies, each with more than 1,000 people

## CUSTOMER EXPERIENCE

- [Exploring Performance](#). A report analyzing the factors that enable agencies to create work environments that contribute to a better customer experience

## OTHER INFORMATION SOURCES

- [Federal Budget](#). Budget requests to Congress
- [GPRAMA](#). Government Performance and Results Act Modernization Act of 2010
- [GAO High-Risk List](#). Programs and operations that are “high risk” due to their vulnerabilities to fraud, waste, abuse, and mismanagement, or that need transformation



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