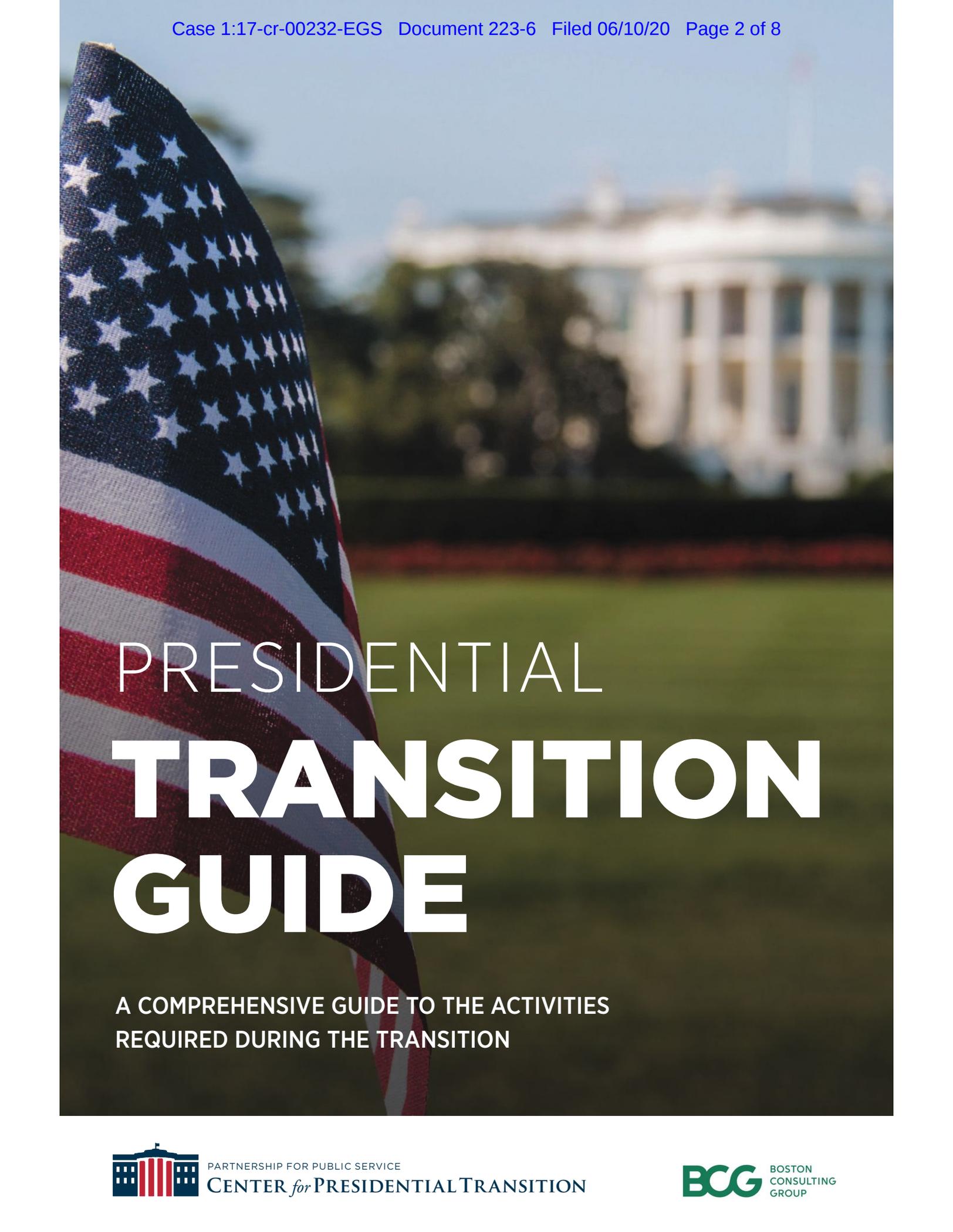


# **EXHIBIT 4**



# PRESIDENTIAL TRANSITION GUIDE

A COMPREHENSIVE GUIDE TO THE ACTIVITIES  
REQUIRED DURING THE TRANSITION



PARTNERSHIP FOR PUBLIC SERVICE  
CENTER *for* PRESIDENTIAL TRANSITION

**BCG** BOSTON  
CONSULTING  
GROUP

The Partnership for Public Service is the only nonpartisan, nonprofit organization dedicated to achieving a more effective and innovative government for our country. Not bigger or smaller government, just smarter. We do so by focusing our efforts on improving the leadership capacity of our federal agencies and the systems that support them.

The Partnership teams up with federal agencies and other stakeholders to make our government more effective and efficient. We pursue this goal by:

- Providing assistance to federal agencies to improve their management and operations, and to strengthen their leadership capacity.
- Promoting accountability by generating research on, and effective responses to, the workforce challenges facing our federal government.
- Advocating for needed legislative and regulatory reforms to strengthen the civil service.
- Identifying and celebrating government's successes so they can be replicated across government.
- Conducting outreach to college campuses and job seekers to promote public service.

The Partnership relies on the generosity of donors to carry out these activities, and we invite others to join in support of this important effort.

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CHAPTER 6

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# Supporting the President-elect

The roughly 75 days between election and inauguration will be an exceptionally busy time for the president-elect, whose days and nights will be filled with internal meetings, travel, intelligence briefings, public events, personnel decisions and finalizing the policy agenda for the first 100 and 200 days of the presidency. This chapter focuses on the rigorous planning required to ensure the run-up to the inauguration will effectively meet the needs of the president-elect and lay the groundwork for a successful start to the new administration. While some decisions, by necessity, will be made after the November election, planning for the president-elect's schedule and the timelines for various decisions should begin well before the ballots are cast.

## **FUNDAMENTALS OF THE PRESIDENT-ELECT'S SCHEDULE**

The president-elect's time is a limited resource that must be invested wisely. Scheduling choices are informed by a variety of factors that include personal style, relationships, and the priorities and agenda set during the campaign. These and other factors must be weighed in designing a forward-looking, high-impact schedule. Ideally, such a schedule aligns engagements, outreach, briefings and other meetings to the president-elect's key responsibilities during transition. It is critical that the president-elect selects personnel, refines priorities and builds support with key stakeholders during this time.

The nature of the transition support has varied based on what works best for the president-elect. It is important, therefore, to understand the president-elect's work style, including their preferred manner of receiving information and who should be included in meetings.

George W. Bush's transition team did not play a role managing his activities; those were handled by the incoming chief of staff and other incoming White House staff. The Romney Readiness Project envisioned a different model.

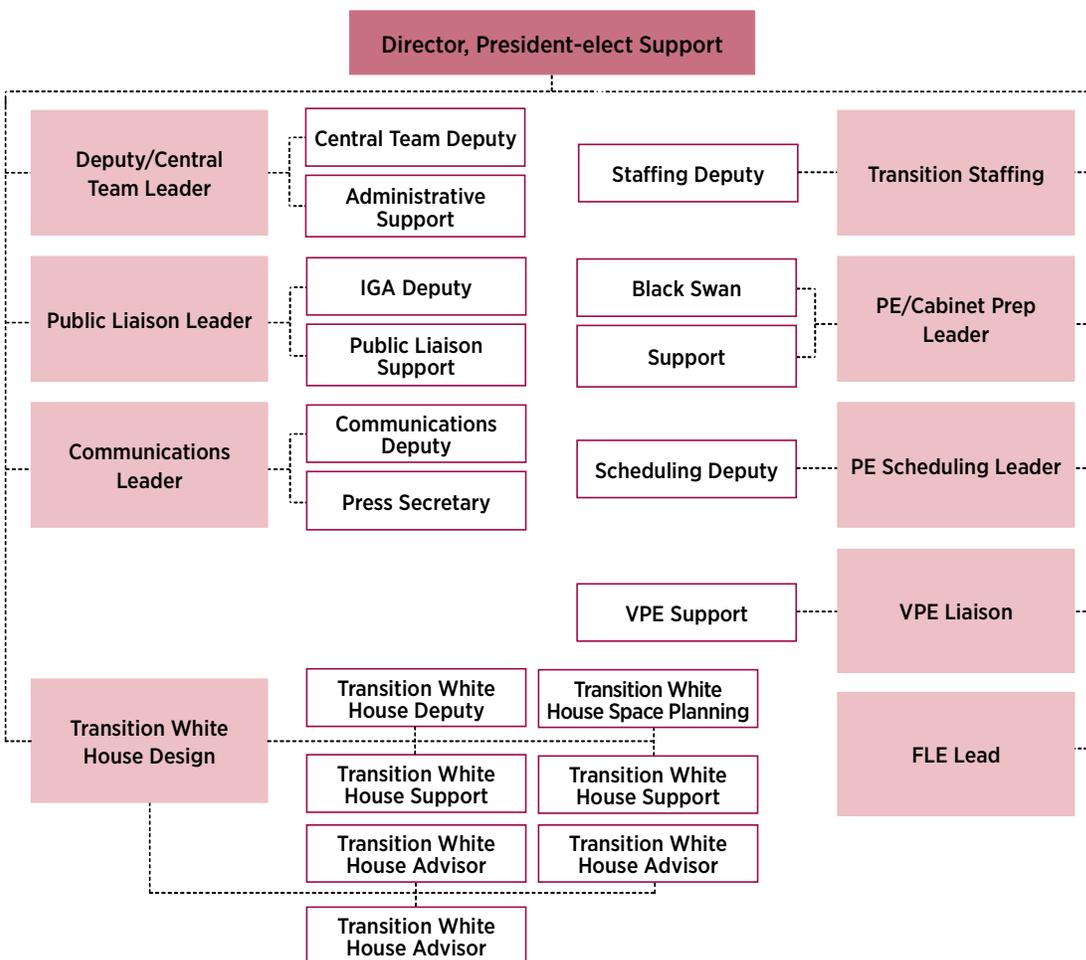
The president-elect support team designed a strategic 75-day calendar to help advance the new administration’s goals. Their work included everything from the president-elect’s scheduling and “transition White House design” to Cabinet preparation and assistance for the vice president-elect and the incoming first lady. The Barack Obama transition team planned a detailed schedule, but the exigencies of the financial crisis resulted in a new plan for the president-elect after the election.

**Political functions**

A good portion of the president-elect’s time between the election and the inauguration will be taken up by traditional events and formal functions. These include personnel announcements, congratulatory communications with foreign dignitaries, outreach to Congress, engagements with major political figures and meeting with the defeated opponent and with the outgoing president.

**Romney president-elect support: organizational chart**

IGA=Intergovernmental Affairs, PE=President-elect, VPE=Vice President-elect, FLE=First Lady-elect



Source: Michael O. Leavitt, Christopher Liddell, Daniel Kroese and Clark Campbell, “Romney Readiness Project 2012: Retrospective & Lessons Learned,” R2P, Inc., 2013, 58.

### Various transition approaches

Transition approaches are influenced by each president-elect’s personal style, and strategic focus of the day.

	CLINTON	G.W. BUSH	OBAMA	TRUMP
Location preferences	<ul style="list-style-type: none"> <li>Based in Arkansas; two brief, high-impact DC trips</li> <li>Several trips to other states</li> </ul>	<ul style="list-style-type: none"> <li>Late move (delayed result; preference to stay outside DC)</li> <li>Flew stakeholders, members of Congress to Texas</li> </ul>	<ul style="list-style-type: none"> <li>Based in Illinois, but early DC move for daughters’ school</li> <li>Split transition office model (Illinois and DC)</li> </ul>	<ul style="list-style-type: none"> <li>Based in Trump Tower in New York City</li> <li>Conducted meetings and interviews with potential nominees at his properties in Bedminster, NJ and Palm Beach, FL</li> </ul>
Personnel selection	<ul style="list-style-type: none"> <li>Highly consultative approach; high president-elect engagement in interviews (including low-level White House)</li> <li>Announcements made later in blocks-Cabinet then White House</li> <li>Promotion of successive transition leads to Cabinet</li> </ul>	<ul style="list-style-type: none"> <li>Official processes delayed until president-elect declared, but hearings expedited to ensure readiness on Jan. 20.</li> <li>White House and Cabinet announcements made rapidly, in parallel</li> </ul>	<ul style="list-style-type: none"> <li>Extensive written application process</li> <li>Daily announcements (White House then Cabinet)</li> <li>Announced in “topic clusters” to create press opportunities and frame policies</li> </ul>	<ul style="list-style-type: none"> <li>Appointed hundreds of officials known as “beachhead” appointees using temporary transition authorities</li> <li>Kept the public informed about interviews and selections of top appointees</li> </ul>
Policy focus	<ul style="list-style-type: none"> <li>Commentary on broad range of topical issues (including economy and foreign policy)</li> <li>Used “summit” approach (economic)</li> </ul>	<ul style="list-style-type: none"> <li>Heavy emphasis on economy and education</li> <li>Expanded “summit” format (business, technology, education, agriculture); used to inform policy</li> </ul>	<ul style="list-style-type: none"> <li>Dominated by economic crisis</li> <li>“Backward mapping” of key foreign and domestic events to prioritize policy (e.g., TARP)</li> <li>Used Cabinet announcements as policy platforms</li> </ul>	<ul style="list-style-type: none"> <li>Created four joint task forces of agency action and policy team members to tackle key cross-cutting issues, which included “Buy America,” women and children, intellectual property and currency manipulation</li> </ul>
Congress and stakeholder outreach	<ul style="list-style-type: none"> <li>Congress compressed into two brief, high-intensity DC visits</li> <li>Significant effort with external stakeholders (e.g., business leaders and benefactors)</li> </ul>	<ul style="list-style-type: none"> <li>Significant outreach to own party; some to Democrats</li> <li>Key stakeholders visited Texas</li> <li>Vice president conducted much outreach as president-elect’s “proxy” in DC</li> </ul>	<ul style="list-style-type: none"> <li>Less emphasis on Congress due to partisan rifts, though more in January due to crisis</li> <li>Transition team conducted much on president-elect’s behalf</li> </ul>	<ul style="list-style-type: none"> <li>Created an office to serve as the first point of contact with the business community, associations and other organizations</li> <li>Held 28 listening sessions between Dec. 1 and Jan. 13 to hear about policy concerns</li> </ul>
Media and publicity	<ul style="list-style-type: none"> <li>Significant focus on media and public appearances (including speeches and events)</li> </ul>	<ul style="list-style-type: none"> <li>Strong use of photo ops; ad hoc press interaction</li> </ul>	<ul style="list-style-type: none"> <li>Announcements and web videos as policy vehicles</li> <li>Staggered appearances to stay in public eye</li> </ul>	<ul style="list-style-type: none"> <li>Staff held daily transition briefing calls with the media</li> <li>Occasionally briefed reporters staked out at Trump Tower</li> <li>Communicated frequently with the public through personal Twitter account</li> </ul>

Source: Boston Consulting Group analysis

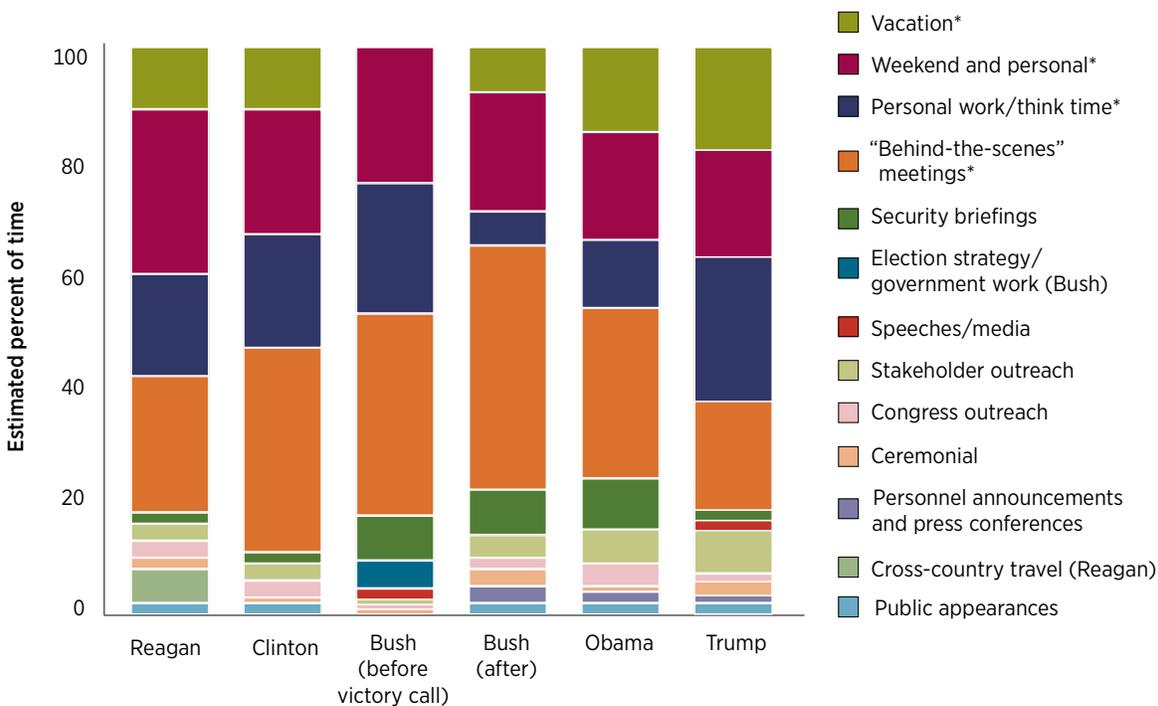
State and local outreach also plays an important role. State and local governments can provide a pipeline of potential nominees and serve as a source of policy ideas. In 2008, the Obama transition had an intergovernmental affairs shop that coordinated this communication and outreach. In 2016, state and local entities were a priority of the Trump transition’s Office of Nationwide Engagement’s listening sessions.

During this period, it is best practice for the president-elect and the staff to understand the relevant protocols and adhere to the democratic custom that there is only one president at a time, especially in contacts with foreign leaders. The transition team should also acknowledge and work with the outgoing administration to ensure the government is always speaking with one voice, especially on matters of national security and foreign policy. President-elect Donald Trump deviated from this tradition in a December telephone call with the Taiwanese leader, and in his later criticism of the Obama administration’s decision not to veto a United Nations resolution critical of Israel’s settlements.

In the 2008-2009 post-election period, President-elect Obama kept quiet on emerging foreign policy crises, but was outspoken on the financial crisis and his plans for the nation’s financial recovery.

### President-elect time study

Allocations vary greatly across four president-elect transitions. This is largely due to different investments in meetings, personal work and time off.



\*Categories are unaccounted in public records and are estimated

Source: Time study analysis based on historical records of public-facing time and assumptions to drive unaccounted activities (including 10- or 12-hour work days, weekend and vacation time off with exceptions, regular intelligence briefings, extra personnel and policy meetings daily). Detailed assumptions included in backup.

## Policy and intelligence briefings

After the election, the president-elect and top advisors will receive daily intelligence briefings on matters of national security. In addition, there will be regular meetings on major domestic and international developments as well as potential policy decisions. The frequency and content of these meetings will vary depending on the president-elect's management style and policy agenda. Data compiled by the Boston Consulting Group found that Presidents-elect Bush and Obama spent roughly 8 to 9 percent of their time on security and intelligence briefings, while President-elect Trump spent only 2 percent of his time receiving these briefings. Trump stated publicly that he did not need them on a daily basis and was content to rely on those around him on matters of intelligence and national security.<sup>63</sup> (See the time study analysis on the previous page.) Vice President-elect Mike Pence, however, received regular intelligence briefings after the 2016 election.

In general, meetings with the president-elect during the transition should use the same processes that will eventually govern meetings in the White House, including briefing materials, agenda preparation and a clear means of communicating the president's decisions and corresponding action items. The transition period is a good opportunity to test and refine processes and learn to work together as a team.

It also can be helpful to confer with officials from the outgoing administration to get up to speed on hot button issues that will quickly confront the new president. During the 2008 transition, as the financial crisis was growing, President-elect Obama's economic team met with Bush administration officials to discuss the distribution of Troubled Asset Relief Program funds, the collapse of the auto industry and the appointment of an auto czar.<sup>64</sup> In order to be fully prepared for these types of situations, the president-elect and his team will need to be briefed in advance of such meetings.

## Meeting with the defeated candidate

During the transition, the president-elect traditionally meets with his election opponent. This is an opportunity to reaffirm the strength and vitality of America's democracy and to look for potential areas of common ground on which the two can work together. On Nov. 17, 2008, about two weeks after the presidential election, President-elect Obama met with his campaign opponent, Sen. John McCain of Arizona, at the Obama transition office in Chicago to discuss critical issues of interest to both men, such as Guantanamo Bay and the war in Afghanistan. Following the meeting, they issued a joint statement saying, "We hope to work together in the days and months ahead on critical challenges like solving our financial crisis, creating a new energy economy, and protecting our nation's security." By taking the time for such a meeting, the president-elect can demonstrate goodwill toward political adversaries and potentially generate more support for policies that will be pursued after the inauguration. Defeated presiden-

<sup>63</sup> Louis Nelson, "Trump: I don't need daily briefings," *Politico*, Dec. 11, 2016. Retrieved from <https://politi.co/2IusFKs>.

<sup>64</sup> Martha Joynt Kumar, "The 2008-2009 Presidential Transition Through the Voices of Its Participants," *Presidential Studies Quarterly* 39(4), October 2009, 840. DOI: 10.1111/j.1741-5705.2009.03712.x. Retrieved from <https://bit.ly/39xD7gl>