

Ready to Act

Preparing to Serve in an Acting Role During the Presidential Transition

SUCCESSING AS AN ACTING LEADER IN YOUR ORGANIZATION

Tips

- Prepare for your new role.
- Be sensitive to the environment.
- Focus on relationships.
- Remember that optics matter.
- Maintain stability and continuity.
- Set the incoming political appointee up for success.

Potential derailers

- Pursuing your own agenda
- Hesitating to make decisions
- Letting the acting role go to your head
- Criticizing the previous or new political teams
- Hiding potential problems

QUESTION GUIDES

Use the following questions to guide initial and ongoing conversations with key stakeholders who can help you clarify your role, responsibilities and decision-making authorities as an acting official.

Questions to ask your new boss or supervisor

- What is my role while serving in this position?
- What do you see as the key priorities for the next six months? 12 months?
- How empowered am I to make decisions?
- What is your definition of success for my time in this position?
- What is my authority to speak outside of the department?
- What meetings should I participate in?
- Should I move into the outgoing appointee's office?
- How should I respond to congressional inquiries, FOIA requests and requests from the media?

Questions to ask your Office of General Counsel

- What is the legal line of succession for positions in our agency?
- Am I statutorily qualified to act in this position?
- What are my decision-making authorities as an acting official?
- Is there anything that an appointee can do that I cannot?

- What is my authority to speak outside of the department?
- What is the technical scope of my position regarding budgets, contracts and staffing?
- Do I need a security clearance to perform the duties of this position?
- Do I need to update my financial disclosure?
- What potential conflicts of interest might I have?

Questions to ask the outgoing political appointee

- What responsibilities does my new role entail?
- What do you see as the key priorities for the next six months? 12 months?
- What meetings did you attend so I can provide continuity?
- Are there any problems or potential landmines I should be aware of?
- Are there any outstanding decisions that you are not going to make before you leave that I should be prepared to deal with?

Questions to ask your Designated Agency Ethics Official

- Are there any heightened ethics concerns that I should be aware of?
- Is accepting this acting position going to impact my post-employment opportunities?

NOTE: You may also consider meeting with your offices of Congressional and Legislative Affairs, Intergovernmental Affairs and Public Affairs to ask similar questions and further clarify your role.

TRANSITIONING OUT OF YOUR ROLE

Meet with incoming appointees as soon as possible

- Turn agency/office affairs over in the best shape possible.
- Invest in the success of the incoming political appointee.
- Identify any major ongoing challenges or dynamics to be aware of as they come onboard.
- Explain what your organization and programs do.
- Discuss how and where the appointee will intersect with your work and programs.
- Share your strengths and areas of expertise, then ask how you and your colleagues can help.
- Be mindful of the personnel dynamics you are returning to in your previous role.

CRITICAL RESOURCES

Partnership for Public Service – Center for Presidential Transition Platform
presidentialtransition.org/

Political Appointee Tracker
washingtonpost.com/politics/interactive/2020/biden-appointee-tracker/

Agency Transition Guide
presidentialtransition.org/wp-content/uploads/sites/6/2023/11/2023-Agency-Transition-Guide.pdf

General Services Administration – 2024 Presidential Transition Directory
gsa.gov/governmentwide-initiatives/presidential-transition-2024

Office of Personnel Management – 2020 Presidential Transition Guide to Federal Human Resources Management Matters
opm.gov/about-us/reports-publications/presidential-transition-guide-2020.pdf

Government Accountability Office – Info on Federal Vacancies Reform Act
gao.gov/legal/federal-vacancies-reform-act

Congressional Research Services – The Vacancies Act: A Legal Overview 2022
crsreports.congress.gov/product/pdf/R/R44997/14

Presidential Transition Act of 1963, As Amended 2022
uscode.house.gov/

OPM Plum Data
opm.gov/about-us/open-government/plum-reporting/plum-data/

Federal Position Descriptions
presidentialtransition.org/appointee-resources/federal-position-descriptions/