

# **Gubernatorial Transition Planning Questions**

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## **Overall Resources**

Do you have planning documents or a checklist of items that are used for transitions that you can share?

Do you have statutes related to transitions? What do they require? Do they assign specific responsibilities/processes?

Who (what entity) is your designated/central contact person on transition issues?

Would you be willing to serve as a resource for fellow NASBO members?

How far in advance do you start planning for a transition?

## **Briefing Materials**

Do you have a template used for budget briefings that you can share?

When do you provide a budget briefing and what information do you include (before the election to both candidates or after the election)? Who is involved?

How do you avoid the 25 pound book that no one reads?

How many years of data do you include in briefing documents? For example, 10 year look back and major cost drivers.

What statewide issues and department issue briefs do you provide – meetings or paper briefing documents?

Agency briefing books—numbers may not be consistent—consistency across agency briefing books a key challenge. How do you make sure there is statewide consistency?

How do you present budget options in the context of the four-year term?

## **Internal Budget Office**

How do you deal with/prepare your presumably nervous staff worried about the upcoming changes that might take place with the change in governors?"

What is the role of the budget office?

How do you establish the trust/confidence in the budget office during the transition?

How do you deal with brain drain, staff morale and retention?

### **Internal Budget Office (Con't)**

How do you deal with the level of anxiety around government?

How do you make sure information is kept close since it is constantly evolving?

How do you go about working for the outgoing and incoming administrations at the same time?

Do you make sure to get ongoing operations out of the way—an example is issuing tax anticipation notes?

Is there extra time for the new governor to prepare a budget?

### **Communication/Protocols**

What communication do you have after the primaries and before the general election with each candidate?

What is your strategy for limiting information to avoid overload and focus on the top critical issues?

Who's in charge? What are the protocols for dealing with incoming Governor's staff, their requests, directives, etc. before they officially take over.

The "L" word.....Legacy will pervade all aspects of the final months – sometimes in ways that disadvantage the incoming administration. How do you deal with that?

How do you make sure to give all of the information you give to one candidate to the other candidate as well?

How do you address the broad campaign themes in the budget?

When you don't know can be dangerous—when do you offer up information? Do you have objective information available and summarized?

How do you organize actionable information and prioritize it for "new eyes" for a smooth transition?

What are the traditions of the transition?

### **Budget Funds for Transition**

How much is appropriated for transition costs – for transition period for the elected official and for set-up by agency responsible?

What can transition funds be spent on?

What are the practices governing office space for the transition?

Do you have sessions about the state's procedures in purchasing, hiring, and other statewide processes?