



THE WHITE HOUSE TRANSITION PROJECT  
1997-2021



Kinder Institute on  
Constitutional Democracy  
University of Missouri

*Smoothing the Peaceful Transfer of Democratic Power*

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REPORT 2021—220

**THE OFFICE OF THE CHIEF OF STAFF  
A BRIEF OVERVIEW**

Charles E. Walcott, *Virginia Tech*

David B. Cohen, *The University of Akron*

## WHO WE ARE & WHAT WE DO

**THE WHITE HOUSE TRANSITION PROJECT.** Begun in 1998, the White House Transition Project provides information about individual offices for staff coming into the White House to help streamline the process of transition from one administration to the next. A nonpartisan, nonprofit group, the WHTP brings together political science scholars who study the presidency and White House operations to write analytical pieces on relevant topics about presidential transitions, presidential appointments, and crisis management. Since its creation, it has participated in the 2001, 2005, 2009, 2013, 2017, and now the 2021. WHTP coordinates with government agencies and other non-profit groups, e.g., the US National Archives or the Partnership for Public Service. It also consults with foreign governments and organizations interested in improving governmental transitions, worldwide. See the project at <http://whitehousetransitionproject.org>

The White House Transition Project produces a number of materials, including:

- **White House Office Essays:** Based on interviews with key personnel who have borne these unique responsibilities, including former White House Chiefs of Staff; Staff Secretaries; Counsels; Press Secretaries, etc. , WHTP produces briefing books for each of the critical White House offices. These briefs compile the best practices suggested by those who have carried out the duties of these office. With the permission of the interviewees, interviews are available on the National Archives website page dedicated to this project:
- **White House Organization Charts.** The charts cover administrations from Ronald Reagan to Barack Obama and help new White House staff understand what to expect when they arrive and how their offices changed over time or stayed the same.
- **Transition Essays.** These reports cover a number of topics suggested by White House staff, including analyses of the patterns of presidential appointments and the Senate confirmation process, White House and presidential working routine, and the patterns of presidential travel and crisis management. It also maintains ongoing reports on the patterns of interactions with reporters and the press in general as well as White House staffing.
- **International Component.** The WHTP consults with international governments and groups interested in transitions in their governments. In 2017 in conjunction with the Baker Institute, the WHTP hosted a conference with emerging Latin American leaders and in 2018 cosponsored a government transitions conference with the National Democratic Institute held in November 2018 in Montreal, Canada .

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**THE KINDER INSTITUTE ON CONSTITUTIONAL DEMOCRACY.** A central element of the University of Missouri's main campus in Columbia, Missouri, the Kinder Institute on Constitutional Democracy prepares students for lives of thoughtful and engaged citizenship by equipping them with knowledge of the ideas and events that have shaped our nation's history. See more information on the Institute at: <https://democracy.missouri.edu> .

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# THE OFFICE OF THE CHIEF OF STAFF A BRIEF OVERVIEW

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The White House Office of the Chief of Staff is crucial to the successful operation of the contemporary presidency. While the job of the chief of staff (COS) has many common elements from one administration to the next, there are also key differences. These result mainly from different presidents' work styles and preferences about how the office—and the presidency—should operate.

A chief's understanding of the job should arise out of close communication between the new POTUS and the COS, since the president will define the chief's role. A lack of agreement on the chief's role and duties can undermine the effectiveness of the White House as a whole. This has been the case more than once in modern presidencies, perhaps most notably in the tense relationship between President Donald Trump and one of his chiefs, General John Kelly. In addition, prospective chiefs can tap other resources to gain an understanding of the office, its potential, and its possible pitfalls. Probably the best such resource is former chiefs of staff, who should be consulted on a bipartisan basis. Recent history shows that former chiefs have been more than willing to share their experiences and contribute however they can to effective governance. Beyond that, there are written documents, such as this memo, in which we seek to distill highlights and wisdom from our larger report upon which it is based.<sup>1</sup>

For the sake of convenience, we divide the main tasks of the chief of staff into two categories: managerial roles and advisory roles. In practice, of course, these categories and the jobs they encompass overlap. Still, it is useful to break them down into their component parts. Appendix A is a listing of all chief of staff who have served since the Nixon administration, their tenure, and the POTUS they worked for.

### MANAGERIAL ROLES

The chief of staff is the manager of the White House. Presidents have sometimes tried to become deeply involved in the day-to-day running of the organization, but most learn that it is not a good use of their time. Both Jimmy Carter and Bill Clinton went through a period of “spokes-of-the-wheel” organization, which placed them at the center of everything. Both learned that a strong chief of staff is a better option. The outlier was Donald Trump, who experimented with a weak chief (Reince Priebus), then turned to a strong chief (John Kelly) before dismissing Kelly and returning to something more like the spokes-of-the-wheel, albeit with a COS present. Trump chafed at being “managed.” All-in-all, however, the Trump White House would not usually be held up as a model for emulation.

### SELECTING AND MANAGING WHITE HOUSE PERSONNEL

In most administrations the entire White House staff, with a few exceptions, will report to the president through the Office of the Chief of Staff. Best practices demonstrates that at the outset of an administration, the chief of staff should be, and often has been, primarily responsible for putting together the staff. Having one's own people is essential. Loyalty,

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<sup>1</sup> Available here: <https://www.whitehoustransitionproject.org/wp-content/uploads/2020/09/WHTTP2021-20-Chief-of-Staff.pdf>

energy, dependability, temperament, and work style are important attributes for working in the White House, and the chief can select for such qualities. At the same time, a chief must ensure that no matter what personal agendas aides may have (and most aides do have them), it is the *president's* agenda they pursue. Beyond loyalty, though, it is strongly recommended that the president and the chief surround themselves with top quality, talented people.

In order to take charge of the staffing of the White House, it is essential that the president pick the chief at the beginning of the transition period. President-elect Joe Biden's choice of Ron Klain in mid-November of 2020, for example, allowed the nascent Biden administration to begin to organize and find its voice despite President Donald Trump's refusal to concede the election. Normal circumstances will be less fraught, but the advice is the same regardless.

Since the pressures on the chief of staff not uncommonly lead to turnover in the job, some chiefs will be joining during a president's term. With much of the White House staff in place, a new chief needs to bring some of his or her own people in key roles and to gain the president's assurance that the chief will have the power to hire and fire staff.

#### Structuring the Staff

One can think of structuring in different senses, the first of which is the structure of the White House Office (and the Executive Office of the President) as a whole. Here, precedent can be a guide, as the overall formal structure of the office has been basically consistent over recent presidencies, including that of Donald Trump. Nonetheless, there will be decisions to make, including whether to retain certain fairly recent creations such as the White House Office of Trade and Manufacturing Policy (established in 2017) or other "czardoms" that address particular policy issues. These larger organizations issues are among the first things a president and the chief have to settle early in the transition.

A related problem is the design of the chief's own staff. Marginal questions, like how many deputy chiefs of staff to have and what their titles and portfolios should be, also fall into this category. Historically, chiefs have had two deputies, with one responsible for policy and the other for the operations. The line between these is permeable, though, so chiefs will need to determine how firm to make it. There also may be times when certain important advisers or entire sub-units of the White House Office have been added to the chief's office, adding another deputy or an entire separate staff. For example, in the Trump administration Kellyanne Conway was formally placed in the chief's office even though the fit was incongruent. The division of labor among the two or three deputies has varied in recent administrations, partly depending upon the president's needs and partly upon the strengths and experience individuals in those jobs bring to the administration.

#### Controlling the Flow of People and Paper

A more challenging issue involves the "strength" of the chief. Essentially, this means how much control over information and access to the president will be vested in the COS. Since this depends critically on the president's preferences, there must be a clear understanding between POTUS and the chief. Some chiefs who have been seen as lacking strength, such as Mack McLarty or Reince Priebus, have been that way because their presidents did not, at least at first, want a strong chief. Ultimately, of course, Bill Clinton discovered that he did prefer a stronger chief; Donald Trump did not. A key issue regarding strength is whether the National Security Adviser, roughly the chief's peer in the international sphere, is required to report through the COS. But the main measure is the chief's role in managing an orderly decision system.

Control of the paper flow to the president is necessary due to the simple fact that if everything intended for POTUS actually reached the Oval Office, the president would be swamped. The same applies to people—up to and including Cabinet officers and even the vice president—who insist on seeing the president personally in order to make their case. If they all got their way, far too much of the president's time would be consumed. As Bill Clinton learned in the early years of his presidency, a gatekeeper is needed. This can be a continuing problem, as virtually any type of meeting, with or without the president, can become unwieldy if everyone who wants to attend is allowed to be there.

### MANAGING INFORMATION AND BROKERING OPINIONS

Beyond traffic control, gatekeeping dovetails with the need for an orderly and effective decision-making system. At least since Nixon, all White Houses have employed a version of a decision process that seeks to provide the president with the best information possible while allowing all relevant voices to chime in on the decisions. The process involves circulation of decision memoranda, outlining the choice(s) to be made, to all officials with expertise or a stake in the president's decision. Direct management of this process is the duty of the staff secretary, who reports directly to the COS, though the chief will ultimately determine what goes into the Oval Office.

In addition to the decision memoranda process, presidents also require background papers on issues to be decided. The chief's office is often responsible for preparing or securing such papers as well as for arranging (or denying) individual's meetings with the president at which they can lobby for their preferred outcomes. Generally, the COS will sit in on such meetings. This serves as a check on what James Baker has called "oh, by the way" requests, where the president is asked for something on which he has not been briefed, and might be inclined to say "yes" just to be cordial.

The chief is responsible for presidential briefings. The regular morning meetings between the president and COS are a time for briefings, as are ad hoc meetings in which the chief assembles a group of advisers to make a presentation to POTUS on a topic of immediate interest. The chief normally works with other staffers, such as the national security adviser, in setting up these briefings. Briefings and discussion also run down the chain of command. The chief typically has a morning briefing for the top White House staff. Everyone on the staff will want to join this briefing and it falls to the chief to make sure that the number of attendees doesn't become unmanageable.

Limiting access to the Oval Office, then, serves several purposes, one of which is to protect the president from his friends and supporters. Presidents are politicians and they tend not to like to say "no." Thus an important function of the COS is to protect POTUS by eliminating or reducing those politically and/or personally embarrassing situations which put a president on the spot. This will not make the chief popular. Strong chiefs can curry resentment and acquire reputations like Sherman Adams in the 1950s as "the abominable 'no' man." But it is a necessary part of the job.

Overall, a strong chief will use control over people and paper to assure a thorough and balanced presentation to a well-prepared president. Such a chief will actively discourage "end runs" by those who would try to work around the process. However, a chief's ability to control all this will always be limited in some ways by the president. Presidents, for instance, often designate some top advisers to have "walk-in" privileges, meaning they don't need the chief's permission to see POTUS. These frequently include the national security adviser, the vice president, and people with the rank of counselor. Of course, it can also include relatives, political strategists and the like, as the Trump White House illustrated.

In order to succeed in gatekeeping and information management, the chief must have the trust of both the president and the rest of the White House staff. If the chief is seen as a special pleader, the staff will resist. Leaks, end runs, and freelancing could be the consequences. To gain trust, former chiefs agree, the chief must function as an honest broker. This means faithfully assuring that all relevant policy views are presented to the president without spin, and that all officials whose expertise is relevant to a decision are consulted. As James Baker has commented, the chief has to say "no" or "maybe" often enough that the potential for ruffled feathers is great. Any suspicion that the chief is not playing the game fairly can lead to serious internal issues.

## ADVISORY ROLES

Despite the necessity for chiefs of staff to operate as honest brokers, they often function in one way or another as advisors. This seeming contradiction is simply a challenge that every chief faces. The COS likely spends more time with POTUS than virtually any other member of the administration, and that proximity makes an advisory relationship natural and nearly inevitable. Moreover, the chief of staff is a generalist, and therefore in an excellent position to oversee the necessary integration of issues of policy and questions of politics. Thus the chief of staff is often required to advise, especially when advising consists of carrying bad news or disagreements to the president. All presidents need aides who will give them honest feedback and who are not intimidated by the power and trappings of the Oval Office.

### PROTECTING THE PRESIDENT'S INTERESTS

As noted above, chiefs are charged with protecting the president's time. Beyond that, chiefs must see to the president's political and governing interests, whether from a hostile press and Congress, wayward members of the administration, bad advice from staff and supporters, or even the consequences of the president's own actions. Obviously, this demands that the relationship between the president and the chief be one of trust and confidence. The Reagan administration provided a dramatic contrast in regard to protecting the president. The success of the first term "troika" of Baker, Deaver and Meese contrasts sharply with the second-term failure under Donald Regan that led to the Iran-Contra scandal. Regan neither ended the arms deals nor buffered the president from them.

President Nixon's chief, H.R. Haldeman, related perhaps the most telling anecdote in his autobiography. There he recalled that the president would sometimes issue orders that were purely vindictive toward members of Congress and others. Rather than comply, Haldeman relates that he simply sat on them until, sometime later, Nixon would ruefully note that his order (for instance "put surveillance on the bastard") had not been carried out, and would admit that it was for the best. This was protecting the president in its pure form.

### NEGOTIATING WITH THE ENVIRONMENT: CONGRESS, THE DEPARTMENTS, AND OTHERS

Chiefs of staff agree that chiefs need to get around. They cannot remain cloistered in the White House. However, chiefs have varied in how much visibility they have sought. Many, such as James Baker and Dick Cheney, have urged that chiefs stay in the background and not become the center of attention. Baker, for instance, saw it as his duty to keep the press informed, but did it on background—"that's not leaking, that's spinning," he has said. Increasingly, though, chiefs

have functioned as spokespersons, negotiators, and occasionally as go-betweens on key issues. For instance, John Sununu linked Bush 41 to conservative groups, and William Daley linked Obama to business groups.

A key element of the role of most recent chiefs of staff has been congressional relations. Though the White House has an office that specializes in this, the chief has nonetheless become a major administration proxy. That a number of modern chiefs had served in Congress helped burnish their credentials and increased expectations that they would take an active role in the area. The list of these is long, including Donald Rumsfeld, Howard Baker, Leon Panetta, Rahm Emanuel, Mick Mulvaney, and Mark Meadows. In fact, Emanuel and Meadows both relinquished their seats in Congress to become chief of staff. Notably, President Joe Biden, a long-time member of the U.S. Senate, chose Ron Klain, who has extensive background both as a congressional staff member and as vice presidential COS in the Clinton and Obama administrations.

Another element of the chief's job has been as a presidential proxy in dealing with the media. Rahm Emanuel, for instance, was available for comment on almost any issue during the early Obama administration. Recent chiefs such as Rince Priebus and Mulvaney have also been engaged with the media, with sometimes controversial results. Others, like John Kelly, have been less prominent in this role.

The chief of staff also may become involved in relations with the Cabinet and the federal departments and agencies. One typical part of the chief's job has been attending to the implementation of presidential policy by the departments and agencies. Often this has been a large part of a deputy chief's work. Recent chiefs have also been given Cabinet rank, though it is not clear how much difference that has made in regard to the chief's range of responsibilities and influence.

Finally, the chief of staff must deal with interest groups and major donors. Access to the chief of staff can be seen as the next best thing to access to the president. Moreover, the chief will need to oversee the president's schedule, including meetings with supporters and appearances at fundraisers. The White House has offices that specialize in outreach of all sorts. It should be remembered that these report to the chief of staff.

## **PERSONAL STYLES AND ACTIVITIES**

Presidents and chiefs of staff come from a variety of backgrounds, display a diversity of personal strengths, weaknesses, and operating styles, and encounter widely differing circumstances during their time in the White House. All of these factors may impact the effectiveness of the chief of staff and White House operations.

### ***THE VARIETY OF APPROACHES AND PEOPLE***

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Like presidents, chiefs of staff have come from a variety of backgrounds, display a diversity of personal strengths, weaknesses, and operating styles, and encounter widely differing circumstances during their time in the White House. Much of the advice relevant to this mix of factors focuses on the need to adapt to the style and preferences of the president. The hands-on approach of Jimmy Carter or Bill Clinton certainly required a different form of staff support than the hands-off approach of Ronald Reagan. Barack Obama received a large Presidents Daily Brief of twelve-to-fourteen pages on an iPad, complete with hyperlinks and supporting materials. Conversely, Donald Trump preferred a short one-to-three page brief composed of bullet points and visuals. Obviously the temperament, intellectual curiosity, analytic capability, and decision making processes of presidents require adjustment by top aides. This does not always happen. For instance, John Kelly's structured approach fit poorly with the impulsive nature of Donald Trump, in a pairing that never worked well.

An essential task for a chief is achieving the trust of the president. This cannot be taken for granted, but needs to be earned, even when the president and chief have prior working relationships. At the same time, the COS also needs to forge constructive relationships with the various other prominent actors in the White House, including the VP and the first lady, each of whom have their own staffs that must work closely with the president's aides. Leon Panetta, for example, developed a weekly briefing session for first lady Hillary Clinton. In the Reagan administration, Deputy COS Michael Deaver developed a strong bond with Nancy Reagan. When Deaver left and Donald Regan became chief, that element of trust vanished, with dire consequences for Regan.

One final element of advice comes from James Baker. That is that the chief should be surrounded by the best possible people, as deputies and in other roles. If chiefs are too insecure to have good people around, they are courting failure.

### ***YOU ARE NOT THE PRESIDENT***

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Chiefs of staff have enormous power, but that power comes from the assumption that they speak for the president and reflect the president's views. Presidents are elected, chiefs are not. When chiefs become too taken with their own importance or fame, they can forget that they are there to enhance the standing and performance of somebody else, not themselves. It is often suggested that former executives—governors, business CEOs, or Generals—struggle with this



aspect of the job. They are used to being the principal, so becoming chief of staff requires a conscious adjustment that not everyone can make readily.

## **DEVELOPING A DAILY SCHEDULE**

The daily schedule of the chief of staff has several components. The first and primary component is to ensure that the president's daily schedule accomplishes what POTUS wants at the time. Every meeting the president has should be discussed with the chief before being scheduled and then reviewed with staff to see if modifications are needed. When the president travels, the chief or a deputy chief should go along to coordinate staff activities.

A second facet of the chief's schedule is making sure that all speeches and policy positions the White House takes are consistent with broad presidential themes and with one another. Nothing sparks suspicion of "disarray" in the administration as quickly as public airing of apparently divergent positions.

The third component of the daily schedule is meetings. The morning meetings of the chief usually begin with a small group of top staff within the chief's office, then move to a larger meeting that includes all senior staff, and finally to a private meeting between the chief and the president around 9:00 a.m. The chief may also attend the president's national security briefing, which usually takes place in the early morning. The senior staff meeting usually numbers about 10-15 people, most with the rank of Assistant to the President. The rest of the chief's day is apt to feature meetings with members of Congress, the departments, or constituent groups. The chief, as proxy for POTUS, has the authority to negotiate on behalf of the president, within certain boundaries. During a pre-election period, of course, the chief will meet with campaign staff, often in the evening.

## **CONCLUSION**

The tasks of the chief of staff and Office of the Chief of Staff are many, varied, subtle, and critically important to the success of a presidency. While there can be no simple prescription for doing the job right, certain principles do emerge from the experiences of those who have held the position. Very briefly summarized, they are:

### ***GAIN CONTROL***

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The White House is large and complex, and its responses to events must often be immediate. This is not an environment conducive to lengthy discussion or loose management. Successful chiefs have been "strong" ones, but not self-interested or autocratic.

### ***ADAPT TO THE STYLISTIC PREFERENCES AND NEEDS OF A PRESIDENT.***

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Just as presidents differ, optimal approaches to working with them will also. Nothing is more important to remember than that the power of the COS derives only from the president. A chief who forgets this precept, who acts like POTUS, will get in trouble eventually.

### ***PROTECT THE PRESIDENT***

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Adjusting to the presidential style does not preclude compensating for presidential weaknesses. Sometimes presidents are wrong, and in extreme cases presidential orders must be ignored or postponed for the president's and the country's sake. Help the president avoid making "oh, by the way" decisions, where commitments are made without sufficient staffing or thoughtful consideration.

### ***CHOOSE BRIGHT, TRUSTWORTHY AND LOYAL SUBORDINATES***

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Be willing to delegate work to subordinates, knowing that the task will get done as it should.

### ***BE AN HONEST BROKER***

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Chiefs and their deputies should strive, whenever possible, to oversee the policy and advisory processes in as fair and inclusive a manner as practicable. Be careful to include in discussions and decisions all of those—but only those—with a need and competence to be there.

### ***RUN A LEAN SHOP, BE FLEXIBLE, AND ESTABLISH A RHYTHM***

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Under most circumstances, keep the Offices of the Chief of Staff itself relatively lean in order to keep the management challenges of that office reasonable. Be sensitive to the need for informal, fluid, and often temporary

organizational devices (war rooms, ad hoc meetings, etc.) to cope with particular problems or opportunities. Establish clear, predictable rhythms for routing White House operations.

## APPENDIX

**Table 1. White House Chiefs of Staff, Presidents Nixon to Biden**

Chief of Staff	Tenure	President	Party
Harry Robbins (H.R.) Haldeman	1969-73	Nixon	Republican
Alexander M. Haig, Jr.	1973-74	Nixon	Republican
Donald H. Rumsfeld	1974-75	Ford	Republican
Richard M. Cheney	1975-77	Ford	Republican
William Hamilton M. Jordan	1979-80	Carter	Democratic
Jack H. Watson, Jr.	1980-81	Carter	Democratic
James A. Baker III	1981-85	Reagan	Republican
Donald T. Regan	1985-87	Reagan	Republican
Howard H. Baker, Jr.	1987-88	Reagan	Republican
Kenneth M. Duberstein	1988-89	Reagan	Republican
John H. Sununu	1989-91	G.H.W. Bush	Republican
Samuel K. Skinner	1991-92	G.H.W. Bush	Republican
James A. Baker III	1992-93	G.H.W. Bush	Republican
Thomas F. McLarty III	1993-94	Clinton	Democratic
Leon E. Panetta	1994-97	Clinton	Democratic
Erskine B. Bowles	1997-98	Clinton	Democratic
John D. Podesta	1998-01	Clinton	Democratic
Andrew H. Card, Jr.	2001-06	G.W. Bush	Republican
Joshua B. Bolten	2006-09	G.W. Bush	Republican
Rahm I. Emanuel <sup>2</sup>	2009-10	Obama	Democratic
William M. Daley	2011-12	Obama	Democratic
Jacob J. Lew	2012-13	Obama	Democratic
Denis R. McDonough	2013-17	Obama	Democratic
Reinhold R. “Reince” Priebus	2017	Trump	Republican
John F. Kelly	2017-19	Trump	Republican
John “Mick” Mulvaney <sup>3</sup>	2019-20	Trump	Republican
Mark R. Meadows	2020-21	Trump	Republican
Ronald A. Klain	2021-p	Biden	Democrat

*Source:* Compiled by the Authors.

<sup>2</sup> After Emanuel left his post to run for mayor of Chicago, Senior Adviser Peter M. Rouse served as interim chief of staff from October 1, 2010, to January 13, 2011.

<sup>3</sup> Had title “Acting Chief of Staff” but was, in fact, chief.