



Olene S. Walker

## Gubernatorial Succession: Managing Transition

By Former Gov. Olene S. Walker, Utah

*Serving as lieutenant governor is great training in the event that one should have to assume the responsibilities of governor, and there are several steps that can be taken to manage the transition more effectively.*

**H**aving served as lieutenant governor for more than 10 years, I witnessed and participated in administration and policy changes, legislative sessions, budget processes and local, national and international events. I had no idea, however, that this experience would become great training for the day I became Utah's 15<sup>th</sup> and first woman governor. Our governor was younger than I and though I knew it could become my role, I never suspected it would happen.

Nearing the end of his third term, then Gov. Mike Leavitt was appointed by President George W. Bush to serve as administrator of the Environmental Protection Agency. The news surrounding the appointment and the apparent transition of governors became overwhelming and exciting. The buzz included whether or not I would be governor or "acting" governor and the legal authority I had to appoint a lieutenant governor, all of which eventually was solved by our attorney general.

Once we believed Leavitt would be confirmed, we began working on establishing a transition team. We created a shadow governor's office, prepared to step in at the precise moment that Leavitt left office. We shadowed everything from press relations to policy directors.

### Have a Staffing Plan in Place

Even if as lieutenant governor you cannot foresee any reason you would be placed into office as governor, you should have a staffing

plan in place. A transition would most likely happen quickly and unexpectedly, and it is best to already have a plan—just in case.

I believe the most critical positions in my administration were the chief of staff, the press secretary and the administrative assistant/scheduler. It is important they are appointed immediately. Once in place, these employees can assist you with your staffing plan.

I also selected a person to assist with the transition events. These events included the farewell speech and party for Leavitt, his resignation and my inauguration, the inaugural gala, archiving, etc. It was also helpful to have a person managing the move into the governor's residence and office.

### Investigate and Implement the Lieutenant Governor Selection Process

Once the attorney general gave his final interpretation of the state constitution, it was determined I could appoint my lieutenant governor.

I kept my selection very private, telling no one, until the day before the announcement. I selected my lieutenant governor based on our past relationship (we served together in the Legislature), his ability to work as a team, competency, and skill sets which differed but were complementary to my own and those of my staff.

### Immediately Communicate with Cabinet Members

Communication with the press, employees and the public was essential during the transition. It was imperative I be proactive and honest with everyone in order to eliminate rumors and bad press.

I met with department heads and key staff before the transition to express my intentions. I asked specific people to stay and also asked for their loyalty. We discussed critical policy and budget issues and the method for developing future plans. If you are making changes, my advice is to make the changes immediately. Don't wait!

### Handling the Media

At first, most of the media attention was directed to the outgoing governor and our policy was for me to remain as quiet and in the shadows as possible. But questions soon arose regarding the actual description of my title, my authority and my future plans for the state.

Although I couldn't formally appoint a press secretary, I had asked for a select few communications professionals to volunteer time during the transition. I later appointed my press secretary from this pool.

I was surprised at the amount of local and national media attention I received. Not only were reporters interested in me, they wanted to know everything about my family. We prepared extensive biographies, had formal photos taken and prepared a Web site. I also spent a lot of time briefing my press secretary so she could do many of the initial interviews for me. We also prepared for unusual or controversial stories, which was very helpful.

### Start Scheduling Yourself as Soon as Possible

With staff help, we developed a list of important events and began prioritizing them. Once they were on the calendar, we could build a more comprehensive schedule.

It was also critical to develop a procedure to handle the thousands of scheduling requests that came through. Many people wanted five minutes with a new governor. We were able to filter those requests and use staff and department heads as surrogates.

### **Understand the Budget**

I took office one month prior to the governor's budget recommendations being due. Fortunately, I had been present during many of the preliminary budget hearings and was aware of many issues. I also worked on becoming familiar with the budget for the Office of the Governor.

State agencies also supplied critical budget briefings and we were able to present a comprehensive budget.

### **Understand and Develop Policy Positions**

During the transition, I asked every department, senior staffer and the budget office to supply briefing papers. They were compiled into binders for me and the new lieutenant governor, as well as my new staff.

I also scheduled briefings on state/federal issues with our Washington, D.C. office, the National Governors Association and our congressional delegation.

### **Planning the Inaugural Events**

It was incredibly helpful to have a point person for the inaugural events. The most pressing dilemma was payment responsibilities. This should be determined immediately, preferably before any planning takes place.

I began working on my inaugural speech as soon as I learned there was a significant likelihood I would take office. It took much longer to finalize than I thought. Additionally, many lieutenant governors do not have the experience with teleprompters that our governors have, and it is important to have several practice sessions with the equipment and the speech itself.

### **Develop Initiatives Quickly**

It was important for me not to be seen simply as a caretaker governor. For years as lieutenant governor, I had initiated and created many successful programs and campaigns. I wanted to continue some of the projects close to my heart and also to roll-out new initiatives to benefit our state.

During the transition, I asked key people to become the point people on several initiatives. By the time I took office, we had a schedule for press events and most of the background prepared for the launches.

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While developing my initiatives, we also created a brand for the new administration. This was a key element to communicate within days of becoming governor.

### **Be Prepared for Surprises**

One cannot predict the future or anticipate every hiccup (or train wreck), so it is essential to have quality staff and as much preparation as possible done ahead of time.

One area that created some anxiety was the amount of fundraising needed. This included budgets for the inaugural events, special projects, initiatives and running for election. It is essential to understand the fundraising process and to have a fundraising mechanism in place as soon as possible.

### **Have Fun**

While the quick pace of change and new responsibilities swarmed about me, it was critical I took the time to enjoy the events. This was a moment in history to never be repeated and I was at the center. I love public service and tackling tough situations, who could ask for a more perfect opportunity to do those things?!

My family was supportive and my staff was loyal. I was blessed with a network of friends and experts who all had the best interests of the state at heart. Looking back, I'd say the transition was one of the greatest moments in my life.

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### **Bio**

Olene S. Walker became Utah's 15<sup>th</sup> and first woman governor in November 2003. Prior to that, Walker served as Utah's first woman lieutenant governor for over 10 years. As governor, Walker spearheaded many important initiatives including the “Read with A Child” literacy program, watershed improvement, and strengthening partnerships between Utah businesses and higher education institutions. [olene@olenewalker.org](mailto:olene@olenewalker.org).