



STATE OF OREGON

INTEROFFICE MEMO

your copy

TO: Governor Atiyeh

October 10, 1986

FROM: Gerry Thompson

SUBJECT: Transition Plan

Attached is the draft Outgoing Governor's Transition Plan. This is for your review, restructuring, etc. All of your key staff members have a copy as well, and it has been thoroughly discussed.

Shirley Summers and Bob Oliver are completely tuned in to what needs to take place, but let me call to your attention a couple of areas that I think are essential to you.

Page 2 - Your agenda to complete.

Page 3 - Post-election where I point out that it is important to stop agency heads from hunkering down. There is strong evidence that some of that is occurring now, and each cabinet has been put on notice during my last week. One of those issues that concerns me the most is the 208 review being prepared by DEQ. This has to do with water quality and the affects on that by forest practices. Jim Brown has been most disturbed about the process. In a previous memo I told you that Jim had asked us to remain silent on it until he gave us the signal. That signal came in clear at Friday's cabinet. As a result, the door was opened for me to request from Fred Hanson a summary memo explaining the proposed process to you. I would watch this process. It is a deep concern to Jim Brown. I believe Jim's feelings are correct in that Fred will be providing the environmentalists an avenue to foul up the works.

Page 7 - Governors' organizations meetings which will require decisions regarding your attendance as well as to which meetings you will want to invite the new Governor.

Page 8 begins the discussion of record disposition. I carry a deep concern that there has not been a full conversation with you regarding all of the possibilities and potential problems in the disposition of your personal records. I have had many discussions with previous Governor's offices where disposition has been a problem. In particular, those problems center on repositories for which there has been no formal

agreement written to clearly declare a former Governor's rights or a former Governor's designee's rights. Bob Oliver is preparing to carefully define the issue for you so that you can clearly articulate your wishes to prevent any regret on your part later.

Page 10 - The official record of the administration is bothersome. As you can see by an attachment, I started this process in January 1985. The attached memo clearly outlines the schedule for completion, and the project is running very, very, slowly. Denny really does need to be pushed on this so the final document can be completed well in advance of January 12.

Page 12 - Housing and moving. Jon Yunker is currently working to determine if there is a way for the State of Oregon to pay your moving costs. It is my strong belief that the state owes you at least that. After all, we do it for high level state employes when we request them to move to the state.

GT:ss

Attachments

DRAFT

GOVERNOR'S TRANSITION

I. Outgoing team

A. Coordinator and team

The outgoing team must be very knowledgeable about state government and be comprised of individuals fully trusted by Governor Atiyeh.

1. Chief of Staff - Bob Oliver.
2. Director, Executive Department - Jon Yunker.
3. Assistant for Communications - Denny Miles.
4. Assistant for Internal Administration - Shirley Summers.
5. Assistant for Scheduling - Susan Bibelheimer.
6. Executive Appointments - Ede Schmidt.

Obviously, other staff members will be called upon as needed.

B. Timetable

1. Pre-election

Complete as much of the Governor's agenda as possible. Upon election of the new Governor, the focus will probably drastically change. The press will begin to focus its attention to the new Governor's activities, decisions, etc. Less interest will be given our administration.

Governor Atiyeh, by all indications of requests received by the scheduler, will continue to be in demand for public appearances, events, etc. Correspondence, telephone calls, and other activities for staff are beginning to decline rapidly. Staff efforts should be directed toward intense activity to complete the

Governor's agenda which was previously identified in early 1986:

- a. Completion of the liability task force initiative
- Bob Oliver.
- b. Completion of school finance legislative concept - Bob Oliver.
- c. Report of the Oregon ports task force to be delivered to the Governor on October 22 - Greg Baker, Economic Development Department.
- d. Rail abandonment study to be presented to the Governor on October 14 - Gene Maudlin, PUC.
- e. Forest service management response ongoing - Jim Brown, State Forester
- f. Minority initiative schedule for completion November 1 - Kay Toran.
- g. Elections and transition ongoing - Bob Oliver and team.
- h. Corporate excellence awards October 22 - Barbara Carey.
- i. Columbia Gorge ongoing (Currently trying to get a bill passed in both the Senate and House. Trouble coming from Oregon congressional members Denny Smith and Bob Smith. Should it pass, immediate contact needs to be made with the President to get assurance of no veto.) - Odie Vogel.
- j. Insurance code review in process - Bob Oliver.
- k. Hanford ongoing - Lynn Frank, Department of Energy.
- l. *SPOTTED OWL - COMMITTEE REPORT TO GOVERNOR OCTOBER 28*

1. Defeat of ballot measures 9, 11, and 12 completion date November 4 - Denny Miles.
- m. Resolution of Taiwan sister agreement ongoing -
- n. Resolution of Kortge property, Deschutes River, ongoing - Bob Oliver.
- o. Resolution of Liberty Mutual case (Chuck Gill, et al) ongoing - Bob Oliver.

2. Post-election

The official "beginning-of-the-end" trauma will become evident. Some melancholy has already begun. Safeguards to keep staff and Governor's and Mrs. Atiyeh's spirits high should be put in place; i.e., free-flowing internal staff meetings (Monday and Thursday of each week) should become standard. Everyone should freely express their feelings. "Upbeat" should be the mood.

Strong efforts should be made to keep attendance high at cabinet meetings. Already some neglect by agency heads to attendance is occurring.

An ongoing push should be made to be certain all critical issues are shared directly with the Governor. There is evidence some agencies; i.e. DEQ, Fish and Wildlife, and others, are beginning to withhold information pending arrival of new administration. In cabinet meetings the week of October 6, I began the process of reminding agency heads that the withholding of critical information will not be tolerated between now and January 12. Furthermore, every agency head will have been instructed to provide attendance at all cabinet meetings as well as

prepare summary memos of critical issues important to this Governor and any incoming Governor.

3. Post-term

Post-term activities are in the hands of the outgoing Governor. Demands will still be made on the Governor and first lady for public appearances, etc. The Governor may be seeking post-term employment, and there are several on staff who should begin to make preliminary contacts at the Governor's request. In addition, the Governor has already selected ongoing staff assistance during the post-term. Post-term should be viewed as at least the first year after going out of office, although budgetary constraints are in place beginning May 1, 1987. Prior to leaving office, certain staff members including the ^{former} outgoing Chief of Staff can assist the Governor in obtaining donated office space, donated office equipment, etc. In addition, the Executive Department is working with the Governor's Personal Assistant to develop three levels of post-term budget for the Governor's review.

C. Package

The outgoing Governor's transition package should be as complete as possible to provide absolute assistance to the incoming transition team. It will be up to the incoming transition team to decide whether or not to receive all, only a part of, or none at all of the package. Regardless of that decision, the outgoing administration consistent with Governor Atiyeh's approach of responsibility should

be well prepared with the mindset of helping the new administration wherever requested.

1. Office budget - Executive Department

The Governor's Office budget has been prepared in the most flexible manner leaving room for the incoming Governor to either add or delete items. The Executive Department has been assigned the duty of briefing the incoming administration on the parameters contained within the office budget.

a. Existing Governor's personnel, salaries, and duties
Shirley Summers will prepare a complete summary of those positions available in the office whether filled or not along with assigned salaries and duties.

b. Agency heads and salary level

Agency heads serve the Governor in many shapes and forms. Some serve purely at the pleasure of the Governor; some are appointed by the Governor but may be removed only for cause; some are appointed by the Governor but serve at the pleasure of a governing board or commission; some are appointed and removed only by a board or commission. The Executive Department is preparing a complete updated list of all agency heads, their current salary level, and the capacity in which they serve.

2. Boards and Commissions

A complete summary of boards and commissions should be ready for review by the incoming transition team. Ede Schmidt will prepare a complete summary to include many

elements: (a) pending appointments, (b) current resignations, and (c) paid boards.

3. Security

Security is important to both the incoming and outgoing Governor. Arrangements must be made to provide the newly elected Governor security beginning the night of the election. This should also include transportation for the new Governor. In addition, security must continue for the outgoing Governor through the day of inaugural ceremonies. This, too, must include transportation to the Governor's residence following inauguration of the new Governor.

4. Official meetings

Steps should be taken to immediately schedule several meetings that must transpire immediately following election day. In fact, it would not be a bad idea for Susan Bibelheimer to make contact with both gubernatorial candidates' campaign committees to at least tentatively schedule these meetings prior to the election date. All of these meetings, of course, would follow the election:

- a. Governor to Governor
- b. Incumbent Governor's family (Mrs. Atiyeh) to newly elected Governor's family
- c. Transition team to transition team

5. Post-election schedule coordination

Governor Atiyeh under no circumstances should relinquish any public appearance to the newly elected Governor following election date. Schedule should be handled

for Governor Atiyeh just as it has always been handled even following the election. However, there should be some coordination of Governor Atiyeh's schedule with at least the newly elected Governor's transition team. As a courtesy to the newly elected Governor, it would be wise to advise that person or the staff of the public appearances Governor Atiyeh will be making following election. Susan Bibelheimer has been assigned the task of making sure this coordination takes place.

- a. Review post-election pending requests to determine whether or not Governor Atiyeh will be taking that request or if it should be referred to the newly elected Governor.
- b. Review with the newly elected Governor's staff appearances already committed by Governor Atiyeh.

6. Governors' organizations meetings

Governor Atiyeh should invite the newly elected Governor to accompany him to any official Governors' organizations meetings. There is one meeting to which the newly elected Governor will automatically be invited. That is the NGA New Governors' Indoctrination meeting. Confirmation of that date is yet to come to us. Governor Atiyeh may or may not have any involvement in that one.

- a. RGA December 6-9, 1986 (Parsippany, New Jersey)
- b. WGA December 12 & 13, 1986 (Phoenix, Arizona)
- c. New Governor's Indoctrination sponsored by NGA,

~~place and dates yet to be announced~~
NOVEMBER 20-23, 1986 (LITTLE ROCK, ARKANSAS)

7. Briefings and Indoctrinations

Several important briefings or indoctrinations must take place with the remainder to be determined by the new Governor on an as needed basis. Those types of briefings that are mandatory include emergency management and critical issues. Agency heads have been requested to provide to Bob Oliver a quick, short summary memo of critical issues by October 31. Bob Oliver will be certain that these are put in a short, understandable form to be used by Governor Atiyeh only in briefing the new Governor. These issues will be kept updated until such time as the Governor to Governor briefing occurs. There are other briefings and indoctrinations that could be rated as important, but could probably take place between transition teams.

- a. Emergency management - Bob Oliver
- b. Current Governor's Office operation and organization - Shirley Summers
- c. Critical issues - Bob Oliver
- d. Special training for telephone system, computers, etc., on an as needed basis.
- e. Trojan drill scheduled for late November or early December - Governor and Bob Oliver

D. Record disposition

This category may be the most difficult part of the transition. It will be difficult to glean records and properly dispose of those not to be left behind. Records can be divided into two categories: personal, private, and political; and official. Obviously, the personal, private and political are those that are to be retained by the

Governor or given to a repository by the Governor. A quick and dirty definition of official are those records that were created or received for official government business. It is imperative that there be a full discussion with the Governor for repository for those items the Governor wishes to donate. There are several issues regarding repositories. Bob Oliver, with the assistance of Denny Miles, will prepare those issues for discussion with the Governor so that the Governor can clearly articulate his wishes. Each area of responsibility within the Governor's Office will immediately begin clearing files, throwing away material that has no relevance, or passing on material that should be retained. Bob Oliver stands by to assist any who need consultation.

1. Categories of records
 - a. Personal, private, or political
 - b. Official
2. Repositories (possible)
 - a. Historical societies
 - b. Libraries
 - c. Universities
 - d. Archives
3. Repository to be designated for disposition of Governor's personal items
 - a. This must be the Governor's personal decision
 - b. The decision should take into account accessibility for the Governor and any other individuals designated by the Governor

c. Certain rights should be retained through written agreement with any designated repository for retrieval, access, etc.

E. Official record of the administration

It is important that there be an official record of Governor Atiyeh's administration. Throughout the course of 1986 this record has been compiled and is now in discussion form. This record should be completed in a concise and informational form. The Governor needs to make the decision regarding contents and the use of the document. The use of the document could extend from only internal usage to full distribution. Denny Miles will take the lead in developing the official record, completing it, and determining from the Governor the absolute usage of the document.

F. Governor Atiyeh's staff

Many of the Governor's staff have been long-time, valued, dedicated employees. We owe it to them to assist them in finding new jobs. This process was put in place by Gerry Thompson and is currently underway being coordinated by Jon Yunker and Judy Ripka of the Executive Department. Some staff members have had job interviews. Others are just now selecting areas of interest, and some have yet to make any personal contact with Judy Ripka. This process should continue with a stepped-up effort occurring early in November. Jon Yunker can be a big assistance to all staff members. Other issues involving staff are either currently in process or are completed. A full discussion of transfer of insurance and other state government benefits has occurred. Each individual is now in the process of making their personal

decisions. Another important element will be personal thanks to each staff member from the Governor. Robin and Susan Bibelheimer will continue to oversee the niceties that the Governor might want to put in place.

1. Job placement
2. Insurance and other transfers
3. Thank yous

G. Governor and Mrs. Atiyeh

The Governor and Oregon's first lady have played an important role in Oregon's history during the last eight years. It is important that their transition out of state government be as comfortable as possible.

1. Post-term employment

This is a personal choice of the Governor and must remain that way. There are several current and past staff members who are willing to make preliminary contacts for the Governor. It is difficult for a staff member to know where he or she can be of help to the Governor, but it should be noted each is willing to assist.

2. Post-term office

Although it has been assumed that the Governor will have office space available in the building that houses the Atiyeh Brothers Carpets, this may not be the case. Furthermore, the Governor is entitled to donated office space to save dollars from the slim post-term budget. Gerry Thompson and other staff members standby to assist in obtaining rent-free office space.

3. Post-term secretary

The Governor has already made his selection of Robin Shepherd who has agreed to continue assisting the Governor for as long as he needs her. Her compensation will come from the post-term budget.

4. Office equipment, telephone, etc.

Again, the office equipment, desks, typewriters, etc., should be donated to save costs. The same staff members mentioned above are willing to assist in obtaining those donations. There is money in the budget to provide for the necessary telephones. It will be wise to remember that the Atiyeh administration assumed some of Governor Straub's post-term costs. It is fair to expect the same of the incoming Governor. For example, the Atiyeh budget continued paying for Straub's telephone well into the second biennium of the Atiyeh administration.

5. Housing and moving

Currently there is being reviewed any means by which the State of Oregon can assist the Governor in moving costs. That determination has not yet been made.

Several current staff members and former staff members are willing to assist with moving. Obviously, housing will not be a problem in that the Governor has retained his family home in Washington County.

6. Post-term transportation

Official state transportation should be provided the Governor following the new Governor's inauguration. That transportation should be available to transport the Governor and Mrs. Atiyeh to any locations of their

desire throughout inauguration day. The day after inauguration transportation will have to be assumed by the Governor and Mrs. Atiyeh. Some Governors have experienced dismay when they discovered their own driver's license had expired. We should be certain that Governor Atiyeh and Mrs. Atiyeh do not meet the same problem.

7. Post-term budget

The 1985 Ways and Means Committee allowed a flat sum of \$20,000 to meet any post-term costs experienced by the Governor. The budget amount ends May 1, 1987, at which time future costs must either be contributed by the Governor's friends or sustained by the Governor himself.

8. Farewell events

There will be several farewell events, some of which are beginning to come forward now and others that are only in planning stages. Two farewell events the staff will want to plan and which the Governor may want to consider are a luncheon following the inaugural events and perhaps an intimate dinner the evening of the inaugural day with the Governor and key staff members.

9. Atiyeh Alumni Association

All staff members are hopeful that the family will stay together. Therefore, we would like to call ourselves the AAA, or the Atiyeh Alumni Association. Denny Miles has agreed to finalize the current list of staff members as well as former staff members so there can be periodic events when we get together for reminiscing and good times.

10. Final Atiyeh team picture

Close to the last day in office, Denny Miles will arrange for a final team picture to include those staff members who are still a part of the Governor's Office.

11. INVENTORY

It is essential that as staff departs & during the last week in office that all equipment, furniture, etc be inventoried. We do not want a repeat of what we faced with missing inventory from the previous administration. We must be certain everything is in place with nothing missing.

II. Incoming Team

The incoming transition team will be the judge of the help and assistance they want and need from the Atiyeh transition team. We cannot force ourselves upon them, but need to be ready to meet their requests as they come to us. Some items must be provided for the transition team.

A. Logistics - Jon Yunker

The Executive Department has taken steps to provide the incoming transition team with most of their logistical needs. There is a concern as to whether or not enough space will be available in the Executive Department building.

1. Office space
2. Parking
3. Equipment
4. Information

B. Incoming transition team budget

The incoming transition team is allocated \$20,000 to meet their transition needs. This will probably not be enough, and the transition team will need advice on how to fill any budgetary needs on a donated basis. The transition team will also need to have a complete briefing on the remainder of the Governor's Office budget to finish the 1985-87 biennium. They will also need to have a clear understanding of the proposed Governor budget for the 1987-89 biennium. Jon Yunker and Executive Department will handle these needs.

1. Transition team budget - \$20,000
2. Governor's Office budget remainder of 1985-87 biennium
3. Proposed Governor's Office budget 1987-89 biennium

C. Introductions

Several formal introductions must be made as soon as the newly elected Governor and his or her transition team are available on site in Salem.

1. Governor
2. Governors' families
3. Staff
4. Transition teams
5. Agency heads

D. Briefings

Aside from those important and mandatory briefings mentioned in the outgoing team outline, Governor's staff, Executive Department, and agency heads must be prepared to prepare briefings as requested by the incoming Governor and transition team.

E. Inauguration

The incoming Governor will make arrangements for his or her own inauguration. Our staff may be called upon to lend advice or assistance for inauguration day. Governor Atiyeh should continue to occupy his suite of offices right up to the inauguration. We may even want to arrange for some kind of ceremony for the Governor to turn over the keys to the office following inauguration.

F. Security

Security should be provided to the new Governor immediately upon election on election night. Security should even be evident at the election party headquarters the night of the election. Security officers should be assigned to the newly elected Governor once the electorate has made their

decision clear. Transportation needs from election night forward should also be provided the newly elected Governor. Security and transportation must be provided for the incumbent Governor until the day after the inauguration of the new Governor.