

## Governor's Office Onboarding Guide: Scheduling

### **Overview**

Time is the governor's most valuable and limited resource. There always will be more requests than can be accommodated. A large number of people compete for this time, including staff, family, friends, constituents, agency heads, party leaders, interest groups and legislative leaders. Managing the governor's time effectively should be one of his or her highest priorities.

Scheduling serves several important functions. First, the governor's schedule is a management tool that protects his or her time. The schedule offers the governor the opportunity to set priorities while ensuring adequate time for personal and family needs. Second, the schedule should be used strategically to schedule meetings, events and appearances that will serve to promote the governor's programs and priorities. Third, an effective schedule will reflect the governor's management style and facilitate the necessary interaction with his or her staff and cabinet to ensure the smooth operation of the office.

Just as thoughtful scheduling can help further the governor's policy agenda, poor and inefficient scheduling can hamper the governor's ability to use his or her time well. Premature or nonstrategic scheduling decisions can overburden the governor or absorb time needed for more important activities. Nonstrategic scheduling also can result in the governor reacting to requests and furthering others' agendas without adequately communicating his or her message. In addition, lack of adequate preparation and follow-up can undermine any benefits that otherwise might result from a meeting or event. The schedule should be revisited periodically to ensure it is continuing to meet the governor's and administration's needs.

A strategic approach to scheduling can broaden the opportunities available to the governor. It enables him or her to be seen by the appropriate people and balances time spent in each region of the state. Working under the assumption that the governor is welcome almost anywhere at almost any time, the governor's staff can use the schedule strategically to advance the administration's policy and program goals.

### **Organization and Staffing**

The governor's schedule and the scheduling process must support the chief functions of the governor's office. It is important to consider how the scheduling staff will work cooperatively and strategically with other staff. The number of scheduling staff will depend on the volume of work and the roles they must play. The workload will be heaviest when the legislature is in session.

### **Scheduling Staff**

The scheduler will be in constant contact with the governor and many different staff members, including:

- The chief of staff, for adherence to the governor's priorities;
- The governor's executive assistant or personal secretary, for daily review of the governor's schedule;
- Legislative relations aides, for advance work and follow-up on legislative meetings and events;
- The political advisor, for speeches, appearances, meetings with party officials and political events; and
- The communications director, for scheduling press conferences, releasing media advisories and communicating the governor's schedule.

The scheduler must walk a fine line between assertiveness and cooperation in his or her role as a mediator among staff. Relations with staff members competing for the governor's time occasionally will become tense; however, the scheduler must be firm with staff. As a daily practice, the scheduler should keep the governor informed of how much the schedule is eroding as the day progresses and should convince staff members that all infringements will decrease the governor's effectiveness.

One person or office should be responsible for building the schedule and should receive all letters, invitations and phone calls that request the governor's time. The scheduler should be responsible for purging requests to arrive at a manageable number. Although final decisions may be made by a scheduling committee or the governor, the scheduler should be the single contact for receiving requests for meeting with the governor, thereby reducing confusion in the office. The scheduler should have a friendly working relationship with the governor because at times, the calendar will cause the governor to feel overextended.

Regardless of the size of the scheduling staff, a single person—the scheduler—should control one definitive appointment book. He or she should report directly to the governor or chief of staff.

In addition, the scheduler must have a good working relationship with the governor's spouse and the spouse's assistant to meet the governor's family needs.

The size of the scheduling staff will range from one person to several staff, depending on factors such as the size and population of the state, size of the governor's staff, volume of scheduling requests, the governor's scheduling goals and the governor's management style.

## **Workload Considerations**

Because scheduling functions are usually performed by a small staff, workload considerations deserve attention. The volume of work that may be conducted by a governor's scheduling staff is affected by the responsibilities of the scheduling office and the degree to which briefing and advance are the responsibility of the scheduling staff. The scheduler's volume of work is decreased when advance and follow-up activities are carried out by other staff members. Similarly, the burden on the scheduler is alleviated if he or she can supervise or coordinate the work of other staff in the preparation of briefing materials, rather than trying to fulfill every obligation personally.

Much of the scheduler's volume of work also will be affected by the roles he or she may be required to play. These roles could include acting as a buffer to discontented staff, an ambassador to the public and a political strategist. The assumption of these roles, along with the need to remain efficient organized and personable, will require the establishment of clear parameters to ensure that the scheduling function remains balanced and effective.

The busiest time of year for the governor will be during the legislative session. Besides trying to pass priority legislation, the governor will deliver the State of the State address and perhaps the budget message during the early stages of the session. Concurrently, legislators will request time with the governor to discuss projects, pending legislation and other issues. In addition, for a short period after legislative adjournment, the governor will be required to act on bills and participate in bill-signing ceremonies.

## **Tips to Help the Scheduler Reduce the Workload**

- Avoid acting as a messenger for the governor's staff. Because the scheduler often spends a large amount of time with the governor, staff will want him or her to relay messages to the governor. This takes up valuable time.
- Schedule small ceremonial events once a month to use time more efficiently.

- Schedule an hour or two once a month for proclamation receptions. This will save time in the long run.
- Hold scheduling meetings frequently to make decisions about long-term events and priorities and involve the appropriate people in the scheduling process.
- Schedule events to minimize the governor's travel time by combining appearances and maximizing the governor's time in a particular geographic area.
- Work closely with the governor's security, highway patrol and the staff member responsible for doing advance work for the trip to coordinate logistics and make travel arrangements. These individuals will be primary contacts and can help the scheduler determine minute details in the governor's itinerary.

## ***Roles and Responsibilities***

Scheduling incorporates all aspects of the governor's agenda and requires the governor and many of the governor's staff to plan and communicate with one another. Typically, the governor, senior staff, policy advisors, advance staff and others will provide input for the scheduling process. The challenge is to develop an effective working schedule for the governor. To meet this challenge, adequate ground rules must be established to help the scheduler make decisions about allocating the governor's time. The scheduler must know how much time the governor wants to devote to private/family time, office time, staff meetings, briefing meetings, public events and social events. In addition, the governor's scheduler and the spouse's scheduler need a process for resolving conflicts between the schedule of the governor and that of his or her spouse.

Priorities should be built into the schedule, such as important political events, priority program or issue activities and strategic events that enhance the governor's visibility or promote administrative goals. Other occasions or activities—including birthdays, vacations, holidays, anniversaries, annual ceremonial events, the budget cycle, the legislative

session, standing staff meetings and cabinet meetings—can be placed into the schedule annually. A skeleton schedule of “must-do” events and important business and family time will emerge.

As the scheduling process develops, four important questions must be answered:

- What is the governor's role in the scheduling process?
- Who has authority to commit the governor's time?
- Who is involved in making scheduling decisions and implementing scheduling decisions?
- Is the schedule continuing to reflect the governor's priorities and meet his or her and the administration's needs?

By defining these roles and responsibilities, the governor and his or her staff will be able to design a system that accurately reflects the governor's priorities, uses the governor's time efficiently, and maximizes opportunities to promote the governor's program or policy goals.

## **Crafting a Scheduling Philosophy**

The overall scheduling philosophy must be a function of the governor's personal management style. The governor's management style will have a considerable effect on the use of office time.

A governor who prefers to make decisions based on written recommendations will use time differently than one who prefers verbal briefing. A governor who prefers a strong hierarchical structure will need less time for staff walk-ins than one whose style is more collaborative. A governor who likes to hear various parties debate an issue will want to schedule time differently than one who prefers individual consultation. Broad issues to consider when building the scheduling system include:

- Identifying what the governor wants to accomplish through the schedule;
- Determining the role the governor wants to play in finalizing scheduling decisions and

who has final authority in scheduling matters;

- Developing policies regarding the handling of internal and external meetings;
- Verifying the amount of time the governor wants to spend on meetings, work time, telephone calls, staff meetings, staff walk-ins and other business;
- Establishing the earliest and latest times of day the governor wants to be scheduled and the number of times per month he or she wants to be scheduled for evening and weekend events;
- Estimating the amount of time the governor wants to spend traveling in or out of the state;
- Assessing the amount of time the governor wants to spend on ceremonial issues; and
- Setting guidelines for including family and personal time into the schedule.

## Controlling the Schedule

An effective scheduling system will have built-in control mechanisms to ensure that scheduling procedures work the way they are designed. To facilitate organization and flexibility, requests for meetings, social invitations and appearances or speaking engagements always should be in writing, with all available details and a contact person and phone number listed. To minimize confusion and prevent double booking, these requests for the governor's time should come to one point for logging and evaluation. More control over the process is achieved if decisions regarding these requests are made on the basis of established guidelines.

Additional flexibility is retained if schedule plans are confirmed no more than four to six weeks prior to the event. The governor also must play a personal role in controlling the schedule by avoiding personal commitments for meetings or events before they have been reviewed with the scheduler. To adhere to the established schedule, the governor should keep within the time limits set for individual meetings. Many governors find it helpful to have a staff member present at the meeting, both to facilitate follow-up and to keep the meeting on schedule. In other

situations, the scheduler or the governor's personal secretary will remind the governor of his or her eroding schedule as the meeting or day progresses. Organizational safeguards such as these help keep the governor's schedule operating as planned.

Finer points must be discussed during this decision-making phase to ensure that the scheduling process runs smoothly. These include:

- Setting guidelines for the governor's office time;
- Allotting time between appointments for staff follow-up or briefings;
- Determining how far in advance the schedule will be made or reviewed and by whom;
- Deciding how much authority will be granted to the scheduler in screening requests;
- Identifying which staff members will have unlimited access to the governor;
- Determining the officials for whom the governor will maintain an open-door policy (for example, reporters, legislators and agency heads);
- Scheduling the governor's attendance at regular staff meetings, lessening the need for "just a minute" of his or her time;
- Deciding whether the scheduler will report directly to the governor or the chief of staff; and
- Determining when there will be staff coverage at the governor's appointments.

## Developing a Scheduling Strategy

To use the schedule as a management tool, a strategic plan must drive scheduling decisions. A strategic approach to scheduling identifies important program or policies goals and designs scheduling opportunities for the governor to advance these programs and issues.

Strategic scheduling enables the governor to choose the forum in which he or she wants to present an issue, thus maximizing his or her control over public exposure. Nearly any public appearance can be used

to call public attention to problems or needs, secure public support for policies or management initiatives, involve interest groups or elected officials in a certain cause and communicate the governor's message to a specific constituency.

A proactive schedule increases the governor's ability to combine events on a regional basis and use ceremonial events to advance program or policy goals. The governor's staff can divide the state into regions and determine how often the governor should appear in each region, what types of events should be planned and which issues should be covered in public speeches and meetings.

Some governors schedule gatherings such as town meetings and ceremonial events to coincide with their visit to a given area. To facilitate this process, it may be helpful to develop a calendar of upcoming events that can be matched with a map of the state to plan when and where the governor should be making appearances.

## **Evaluating the Schedule and the Scheduling System**

Once the scheduling process is in place and the schedule is developed, it should be examined for effectiveness. This can be accomplished by looking at a day's schedule and asking questions such as:

- Will the governor feel he or she has furthered the administration's agenda as a result of today's activities?
- How much of the governor's time is spent on priority issues?
- Is there a proper balance among meetings, phone calls, media, office time and social events?
- Do meetings begin and end on time?

In addition to a snapshot examination, the scheduling system must be evaluated periodically in a systematic way to ensure it meets the governor's overall scheduling goals. Several broad questions about scheduling results should be asked in this review:

- How much of the governor's time is spent on priority issues?
- Do meetings generally flow properly and is the governor adequately briefed prior to each meeting?
- Are there frequent problems with the schedule, such as double bookings, events that require too much travel time, or conflicts with the governor's spouse's plans?
- Is there movement toward the governor's over- all program and policy priorities?
- Is the governor maintaining a good balance between time spent traveling, performing ceremonial functions, and conducting meetings and time reserved for personal matters?
- Is the governor achieving a balance in his or her appearances in the state's geographical areas?
- Is the schedule being used as a strategic tool to promote the governor's broader objectives?
- Are appearances, speeches and interviews planned, or does the staff simply react to individual invitations?
- Does the governor fulfill obligations that complement his or her policy strategies?
- Are the demands on the governor's time excessive?
- Does the schedule impose limitations on what the governor can accomplish in any given day?
- Is there a better way to use down time, such as travel time to and from events?

The scheduling system also should track the number of requests, turnaround time in acknowledgments, and the ease with which scheduling decisions are made. The system can be revamped and redefined to elicit positive responses to these questions; periodic evaluations help keep the system sensitive to changing needs.

## ***Techniques and Tools***

An effective scheduling system requires only one schedule for the governor. Although access to that

schedule and the release of information on the schedule will vary, the schedule should record all accepted appointments, any time reserved by the governor and all pending requests. A method of noting the office work time reserved for the governor is important because the press, public and staff often see open time on the schedule as an indication that the governor is not working or an opportunity people can seize to schedule another meeting or event. In most states, only one individual has the authority to add to the schedule.

The key to scheduling is balancing time demands—ensuring the governor’s time is allocated efficiently and maximizing the governor’s limited time. The mechanics for implementing such a scheduling system include:

- Receiving scheduling requests;
- Classifying and evaluating scheduling requests;
- Making decisions on scheduling requests;
- Communicating the schedule;
- Preparing acknowledgments, acceptances and regrets;
- Briefing the governor and conducting advance work; and
- Ensuring event follow-up.

Governors’ schedulers rely on information technology to support the entire scheduling process. It is common practice for governors’ schedulers to work with state information technology professionals to customize standard software packages to meet their needs.

## Receiving Scheduling Requests

There will always be many more requests for the governor’s time than can be accommodated. Requests generally will fall into two categories: requests for office time or meetings and requests for personal appearances or speeches. Demands for time come from a variety of sources, including governor’s staff, cabinet and agency heads, legislators, political leaders, interest parties, constituent groups and personal friends.

Some of these requests may be required and others may arise out of specific responsibilities or commitments that are customary for the office. In addition, many event organizers will seek the governor’s participation to add importance or increase publicity for an event.

## Classifying and Evaluating Scheduling Requests

Individuals requesting ad hoc meeting time with the governor generally can be divided into three groups:

**Walk-ins**—People with direct access to the governor, such as senior staff and legislators.

**Mandatory**—Those who can see the governor when other avenues have been exhausted or are inappropriate, such as agency heads, key party officials, members of the congressional delegation or heads of major interest groups.

**Nonmandatory**—Those the governor may choose to see if time is available, including constituents, local community leaders, members of civic groups and interest group representatives.

Although the nature of ad hoc meetings presents difficulty for the scheduler, some governors try to set aside specific periods for such informal contacts. Others rely on their executive assistants to work in such contacts between scheduled events and meetings.

When possible, all other requests for office time and other events should be routed to the scheduler and logged. A format for the logging process should exist so that pertinent information about each request can be maintained for reference.

The logging format should be standardized so each request receives fair consideration. Verbal requests also should be summarized on a written form and submitted. When possible, procedures for screening and evaluating requests should be formalized and written. This enables review of solicitations and invitations in a consistent manner. The schedule log format can be an easy-to-read description of the event, timeframe, people involved, benefits or

opportunities, recommendation and contact. These briefs then can be evaluated in a systematic fashion.

Written requests can be ranked as high-priority events and meetings, routine business meetings, annual events, political party musts and ceremonial occasions such as ribbon cuttings or proclamation signings. The classification of requests is the first step in the evaluation process. Established decision criteria for the scheduling plan can be used to evaluate the requests further, such as:

- Does the request meet most or all of the governor's personal guidelines?
- Will the governor's attendance at the meeting or event enhance a particular aspect of the administration or increase the visibility of an issue before the people?
- Does the meeting or event fit into the governor's strategic plan for scheduling his or her time?
- What opportunities for consolidation with other important events are available?

## **Making Decisions on Scheduling Requests**

As with any decision-making process, input from all major information sources is essential for a satisfactory outcome. Numerous parties should be consulted regularly as part of the scheduling process. These individuals frequently include appropriate senior and program staff, the governor's executive assistant, the governor's spouse and the spouse's representative, key political advisors and the mansion representative.

Depending on volume and urgency, scheduling requests can be evaluated daily or weekly. The review process can be directed by the governor and the scheduler or by a small committee composed of the governor, the scheduler, the chief of staff, a senior policy adviser, the governor's spouse and the governor's executive assistant. A meeting to evaluate the schedule should occur at a time when most requests can be dispensed with quickly by applying established decision rules. Once events and meetings are selected, discussions can center on how these

events fit in with the governor's larger scheduling and policy goals.

Office meeting requests may flow more quickly based on the established guidelines set by the governor, while appearance and speech requests, especially those involving travel, likely will require more scrutiny. Invitations to social engagements for the month should be collected and selected on the basis of the governor's and his or her spouse's preferred level of social involvement. The governor's spouse also needs to evaluate these requests for possible conflict with other commitments or events at the executive residence.

## **Communicating the Schedule**

Once the schedule for the week has been developed, several printed formats can be designed to provide varying degrees of detail. Some schedules may be made available to the press. Specialized schedules may be developed for advance staff, speechwriters or others. Daily schedules often are made available to the governor and his or her spouse. Weekly and monthly schedules can be devised for future planning to ensure the governor is getting the most out of his or her time. A weekly schedule format that lists the governor's public meetings and appearances can be developed and made available to staff, media and the public. An alternative format can provide more detail to senior staff and the governor. A monthly scheduling memorandum can give the governor an outline of upcoming activities and events. For planning purposes, a yearly calendar that builds in annual events and personal activities should be maintained and continually updated.

## **Handling Acknowledgments, Acceptances and Regrets**

As a result of the high volume of requests the governor receives, most invitations will be declined. Usually, the governor's office acknowledges a request with a letter while the request is being reviewed. This is particularly useful for requests received several months or a year prior to the engagement. The acknowledgment letter informs the party that the governor's schedule is very busy and it is too early to determine his or her availability for the day of the

event. The interim letter also can invite resubmission at a later date. Standard format letters can be devised for this purpose. By generating a response quickly, an efficient scheduling unit will eliminate some of the disappointment associated with a later negative response from the governor and minimize problems because of the assumption that no news is good news.

A letter of regret usually is signed by the scheduler and should be a courteous response that invites later solicitation. For invitations that obviously will not be accepted, the letter of regret should be sent out immediately by the governor's office. If the event is important and the governor would like to drop by, a reply could offer to fulfill a lesser role, such as make a few remarks rather than deliver the keynote address. Other possibilities for letters of regret include offering the group a message for a publication or a tribute to the organization or its honoree, transmitting a letter suitable for reading to event attendees or offering to send an appropriate representative/surrogate in place of the governor.

As requests are reviewed by the scheduling staff, those that the governor will accept should be separated from the declined invitations. Depending on how far in advance the governor's schedule is established—typically four to six weeks—appropriate acceptance letters can be generated. There are various formats for acceptance letters, but these responses should make clear what the governor's role will be; provide the name of the governor's office contact; and confirm the date, time and location of the event. Even at this point, none of the governor's affirmative responses are definite. All responses should remain tentative to build as much flexibility as possible to meet changing scheduling needs or crises.

## **Briefing the Governor and Conducting Advance Work**

Once meetings and events are scheduled, staff attention will shift to preparing the governor for the selected meetings and appearances. In many states, this also is the responsibility of an advance person in the scheduling office. The appropriate member of the governor's staff should be responsible for preparing

advance briefing materials for the governor. These could include:

- A general overview containing a daily listing of the day's appointments, the topics covered and the staff member who will be involved or responsible for briefing the governor;
- Specific meeting briefing memorandums with more detailed information on participants, issues, and the physical layout; and
- Verbal briefings to familiarize the governor with the issues to be addressed and any decisions that may be necessary.

External events often require extra preparation such as a preliminary evaluation of issues to be discussed and on-site advance work. In addition, staff coverage at external meetings or events is important to help the governor visit quickly with appropriate parties. Often, advance work will begin days ahead of a scheduled major event, as the appointed staff member identifies and prevents potential problems for the governor. It is good practice to ascertain the capability and reliability of the local contact with whom the governor's office is working. The advance staff or security should arrive onsite early and physically walk through the governor's itinerary to locate entrance and exit doors, the governor's point of arrival, the meeting hall, the holding room, a restroom, the site where the greeter will meet the governor and sites for photo or media opportunities.

For regional trips throughout the state, the advance or scheduling staff should contact county party officials and check the local newspaper to make certain the governor's office is up to date on political sensitivities in that area. In addition, it is helpful to determine what other notable personalities will be attending the function (legislators, cabinet members or sports or entertainment figures) and ask the local contact to connect names with faces. The role of security in advance work varies among states. Security personnel can provide assistance in two ways: visiting the meeting site to learn the lay of the land, and moving the governor once he or she is onsite.



## **Ensuring Event Follow-Up**

Good event preparation should be followed by careful post-event activities for the governor's scheduled appearances. Follow-up activities that leave the public with a positive impression of the governor could include:

- Having staff members attend the event to ensure that any promises or plans for future meetings are referred to the appropriate sources and that follow-up is made;
- Sending thank-you letters to appropriate parties that reiterate any follow-up activities the governor's office is pursuing on their behalf or relevant decisions made on an issue or concern; and
- Soliciting the opinion of on-site advance staff regarding the success of the event and obtaining suggestions for improving the coordination between scheduling and advance staff.

The lack of adequate preparation and follow-up can undermine any benefits that otherwise might result from an event. Efforts such as these also will help maintain courteous, cooperative relations with contacts throughout the state.

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