



The Chief of Staff

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COSs during aggressive M&A
Learnings from Ancient Rome
Private Secretaries at Buckingham Palace

The Quarterly Journal of the CSA



About The Typeface

The Chief of Staff is typeset in Financier Display 24 for headings, Untitled Serif 12-15 for sub headings, Untitled Sans 10 for base text and the footnotes are set in Untitled Sans 8.

Financier Display

Financier Display is a serif typeface designed by Kris Sowersby of Klim Type Foundry. It was created for the redesign of the Financial Times in 2014 and later released as a retail font in 2016. Financier Display is available in six weights with matching italics as well as a corresponding text family.

Untitled Serif and Untitled Sans

Untitled Sans and Untitled Serif are quotidian typefaces. Untitled Sans is a plain, neogrotesk sans validated by the ideas of Jasper Morrison and Naoto Fukasawa's Super Normal project.

Untitled Serif is drawn from the old-style genre of typefaces: the post-Caslon, pre-Times workhorses offered by almost every metal type foundry of the time. Untitled Sans and Untitled Serif are related neither by skeleton nor a traditional aesthetic connection, but by concept only. They have a deliberate aesthetic of not being designed by anyone in particular.



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The Chief of Staff Association

In the modern era, chiefs of staff have uneven access to the diverse global professional and academic bodies of knowledge that currently exist within and about the profession. Without a central information repository, there is no point of reference to guide the evolutionary process intrinsic to the continued growth and development of a field of study. To rectify this, the Chief of Staff Association along with leading academics and practitioners alike offers to the profession The Chief of Staff journal in recognition of the contributions, importance and influence of an intrinsically humble occupation.

The Chief of Staff acts as a clearinghouse for premier data, knowledge, skills and ideas on one of the world's most important but understudied professions. In doing so, we provide chiefs of staff and those within their field of influence with the point of reference necessary to expand their knowledge and increase their effectiveness. As a result, we serve current and future generations of chiefs with the requisite medium to inspire opportunity and promote the growth and admiration of this vocation.

The journal addresses practical, theoretical and historical aspects of the profession, guiding the analysis of historic decisions and inspiring future leaders. As such, we are particularly interested in submissions on syntropic, disruptive ideas, as well as classic insights and advice from senior figures. The Chief of Staff Association (CSA) is the international professional body for Chiefs of Staff in leading corporations, governments, the military and diplomatic corps. Our members have an impact when and where it matters through facilitated connections,

professional certification and curated forums.

The purpose of the Chief of Staff Association is to advance the influence of professional chiefs of staff who are the connectors between global leaders. Three pillars underpin the Chief of Staff Association. Knowledge, Connection and Community.

Knowledge

The CSA strengthens and enhances the integrity of the chief of staff profession through rigorous education from Oxford University, peer learning and professional certification.

Connection

The CSA advances connections to achieve immediate outcomes and create the ideal conditions in which influential, long-term authentic relationships can be formed.

Community

The CSA engages our community of peers sharing elevated insights and experience supporting members effectiveness across their roles and responsibilities.

Structure

Incorporated in the State of Delaware in the United States of America, The Chief of Staff Association is chartered as a public benefit corporation. A public benefit corporation is a private company that intends to produce public benefits and to operate in a responsible and sustainable manner.



Editorial Board



Dr Katherine Firth

MA Ph.D (Oxford Brookes)

Dr Firth is an award-winning and innovative educator. Currently, Katherine is the Academic Coordinator at International House, within the University of Melbourne where she manages the academic program including academic advising, teaching, the library and graduate student academic development. Dr Firth has successfully managed small and large projects, particularly in building digital systems and resources, and in developing collaborations across institutions to support student learning.



Dr Chris Howard

D.Phil.(Oxford) MBA (Harvard)

The eighth president of Robert Morris University, Dr. Howard is a distinguished graduate of the United States Air Force Academy. As a Rhodes Scholar, he earned a doctorate in politics (D.Phil.) from the University of Oxford. He also has an M.B.A. with distinction from Harvard Business School. Dr. Howard earned a Bronze Star for service in Afghanistan, and also served with the elite Joint Special Operations Command and as the Reserve Air Attaché to Liberia.



Dr Carolyn Kissane

Ph.D (Columbia)

Dr Carolyn Kissane serves as the Academic Director of the graduate program in Global Affairs at the Center for Global Affairs at New York University. Dr Kissane is a Clinical Professor where she teaches graduate level courses examining the geopolitics of energy, comparative energy politics, energy, environment and resource security. She serves as the Academic Director for the MS in Global Affairs and the new MS in Global Security, Conflict, and Cybercrime.



Editorial Board



Dr Usman Chohan

MBA (McGill) Ph.D. (ANU)

Dr Usman W. Chohan is an international economist-academic and one of the top 15 business authors in the world, according to the Social Science Research Network. He is the author of *Public Value and Budgeting* and *Reimagining Public Managers*. The *International Journal of Public Administration* and *Parliamentary Affairs* is among the esteemed journals that have published Usman's work.



Dr Stuart Murray

MA Ph.D (Bond)

Stuart Murray is an Associate Professor in International Relations (Bond University, Australia), and a Global Fellow at the Academy of Sport (Edinburgh University). Widely considered as the founder of the Innovative School of Diplomatic Thought, Stuart has written and published over fifty peer-to-peer articles, chapters, and edited books.



Keith Ferrazzi

MBA (Harvard)

Keith Ferrazzi is a #1 NYT bestselling author, who wrote *Never Eat Alone*, *Who's Got Your Back*, and most recently published *Leading Without Authority*. He's an entrepreneur, Founder & Chairman of Ferrazzi Greenlight and an executive team coach to some of the most prominent organizations in the world. He's a thought leader and frequent contributor at publications such as *Forbes*, *Entrepreneur*, *WSJ*, and *Fast Company*.





Jordan Blashek

Chairman (New York, USA)

Jordan is a Director at Schmidt Futures, a philanthropic initiative founded by Eric and Wendy Schmidt, where he oversees their talent, national security and shared prosperity investments. Jordan is also a veteran of the US Marine Corps with two tours of duty in Afghanistan and Africa. He holds a JD from Yale Law School, an MBA from Stanford, and a BA from Princeton University.



Dr Aron D'Souza

Secretary (New York, USA)

Dr Aron D'Souza is a former diplomat, academic and entrepreneur. He was the Honorary Consul of the Republic of Moldova in Australia. Dr D'Souza led PayPal founder Peter Thiel's litigation against Gawker Media involving the wrestler Hulk Hogan, which resulted in one of the largest invasion of privacy judgements in history. He is the editor of The Journal Jurisprudence and has a PhD from the University of Melbourne and a law degree from Oxford.



John Porter

Director (Geneva, Switzerland)

John is a UK tech entrepreneur with close ties to Silicon Valley. He holds degrees from Oxford, Sciences-Po Paris, and Stanford. He is Chairman of AML Analytics Ltd and is a key stakeholder in Telos Corporation, a cybersecurity specialist supplying the DoD and AWS. He has served on the boards of both Stanford Graduate School of Business and the Said School at Oxford, he is a Trustee of the Barbican Centre Trust and on the Board of the Verbier Festival.





Santiago Perez Teuffer

Director (Mexico City, Mexico)

Santiago's strong Latin-American network and diverse business experience between Latin America and the US, provide a valuable edge for him to serve on the Board of the CSA. Santiago has an extensive banking career, and after pursuing his graduate studies at Stanford, went back to Mexico to pursue an entrepreneurial career in the energy industry. Santiago has an MS in Energy from the Stanford School of Energy, and an MBA from the Stanford GSB.



Trent Smyth

Director (Melbourne, Australia)

Trent has served as the Honorary Consul for Malawi for eight years and the Secretary of the Consular Corps Melbourne since 2014. Trent is the founder of the Sports Diplomacy Group which assists companies and major events in tapping into diplomatic and Government channels to export their specialist capability through strategic advice and partnerships. Mr Smyth is a Director of the Australian Grand Prix Corporation and holds a Bachelor of Commerce and an MBA from the University of Melbourne.





Certification at Oxford University

The Chief of Staff Association has partnered with Saïd Business School at Oxford University to create the Oxford Chief of Staff Executive Certification Programme. The programme is available only to Members and Fellows and is conducted, in-person, at Oxford University over the course of four days.

Chiefs of Staff are gatekeepers to the world's leaders. The role demands exceptional talent – and knowledge. Chiefs of Staff are expected to be highly analytical, diplomatic, organized, aware and empathetic, and able to work swiftly and simultaneously across multiple portfolios and agendas. Yet, despite the strategic nature of the role, there exists little in the way of structured professional development delivered to global best standards – until now.

In addition to the academic syllabus, the programme features insights from invited political, diplomatic and business leaders. These speakers share views on the core competencies of the role, and on emerging new challenges and responsibilities. Delegates participate in shared discussion and debate, enriching their perspectives and capability.

Delegates are encouraged – formally and informally – to share best practice and learnings gained in their careers and current roles. At the end of the programme, students not only form strong friendships but also a network of competent peers who can act as ongoing sources of advice and professional support.



Programme Director Rupert Younger



Programme Director - Rupert Younger

Rupert Younger is the founder and director of Oxford University's Centre for Corporate Reputation and co-founder of The Finsbury Group. He is a recognised expert on how reputations are created, sustained, destroyed and rebuilt and has advised some of the world's largest organisations over the past 30 years.

He is the co-author of the best-selling book, *The Reputation Game* (published in October 2017 and now available in six languages), and co-author of *The Activist Manifesto*, published in 2018.

Mr Younger's work and views are regularly featured in major news outlets including the BBC, CNN, the Financial Times, The Wall Street Journal, the New York Times, and The Times of London. In addition, he chaired The University of Oxford's Socially Responsible Investment Committee of Council (2012-2017) member of the Royal Company of Archers, the Queen's Bodyguard in Scotland.



Membership of the Chief of Staff Association

The CSA is a community of peers who, together, build strength, confidence and resilience: extraordinary people achieving extraordinary outcomes in cities across the globe.

Levels of Membership

Associate (ACSA)

Through the Associate Membership programme, The Chief of Staff Association supports the next generation of professional chiefs of staff.

The CSA Associate Membership program reflects The Chief of Staff Association's determination to build a global community of highly skilled, experienced, and connected chiefs of staff at different stages in their careers.

Talented and ambitious people considering a chief of staff career need to build on the knowledge acquired through formal studies by learning from experienced leaders, and by forging connections with peers.

The CSA Associate Membership programme has been designed in collaboration with members to support the personal growth and professional development of the next generation of chiefs of staff.

A virtual programme keeps Associates informed and up-to-date. Associate membership also grants access to valuable CSA Advisory hours and The Chief of Staff journal – a rich source of information and insights from career chiefs of staff working in major cities across the globe.

All Associates receive a certificate of membership, a distinctive Fattorini lapel pin

and individualised GMUND calling cards.

Learn from your peers. Grow your confidence and your international network. Commence a rewarding, future career as a chief of staff.

Member (CSA)

CSA membership provides experienced Chiefs of Staff with access to, and visibility within, an international network of connections, and a global community of peers.

Membership is your passport to find, connect with and learn from Chiefs of Staff who are committed to their craft. We facilitate invaluable introductions with other members and invitations to monthly roundtables and member-only networking events that keep your seat at the table warm.

Importantly, members share advice, helping to test ideas and navigate the ethics and impact of important decisions. In our business, time is of the essence. Our team provides advice and introductions, confidentially and efficiently, when it counts.

Only career chiefs of staff truly understand the role and its many demands. That's why we have established a fast-growing community of peers who, together, build strength, confidence and resilience: a community of extraordinary people achieving extraordinary outcomes in cities across the globe.



A key benefit of membership is the ability to reserve enrolment in the Chief of Staff Certification Programme at Oxford University; the only course of its kind offered anywhere in the world. Learn, contribute your knowledge, and participate in our intercontinental alumni dialogue.

Nothing signals to principals and peers more significant commitment to your chosen career than joining your industries' peak professional body.

And, all members receive subscriptions to The Chief of Staff journal, individualised GMUND calling cards and divisional lapel pins, complimentary CSA Advisory hours as well as the highly regarded CSA post-nominal.



“Trust and relationships are the foundations of progress. The Chief of Staff Association is based on this powerful insight and provides a network of authentic relationships along with the credibility and trust needed for growth.”

Brigadier General Matthew C. Isler, U.S. Air Force (Ret.)



FOREWORD

The Honourable James A. Baker III

White House Chief of Staff (1981-1985)
Secretary of the Treasury (1985-1988)
Secretary of State (1989-1992)



I started my career as a lawyer in Texas with no inclination of ever moving into politics. Yet through a couple of twists and turns in this great game of life, I went on to become White House chief of staff for two different presidents, Secretary of the Treasury and Secretary of State. I credit much of the success I experienced in my unlikely political and public service career to the pride I took in leading through action. Many people live their lives based on the way they think things ought to be, not the way things are. The issue with this approach is that, when you live your life looking through rose-colored glasses, you become blinded to the problems of the real world and the actions needed to solve them.

Being the pragmatist that I am, however, I also recognize that “hope breeds hope” and as such, leaders must often attempt to appeal to those who have a rosy worldview. Ultimately, this is the job of a chief of staff--to balance the aspirations of their principal and those that support them with the reality of what is accomplishable. To be an effective chief of staff you must be content with the anonymity of your accomplishments because they are not your accomplishments. The credit must go to the principal.

To be an effective chief of staff, one should always focus on the “staff” part of the title and not the “chief.” Generally, it is better for a chief of staff to not have been a principal

before they have taken that job because all their power is vicarious from the boss. One’s function as chief of staff is to grease the levers of power for them to be easier for your principal to pull.

It is important that there be a central medium to discuss this vital function. As a result, I am pleased to support the Chief of Staff Association and the launch of their inaugural edition of the journal Chief of Staff. With the launch of this journal, I think that the Chief of Staff Association will be providing the public with the necessary tools and information needed to create a shared knowledge base and respect of this profession. This will make chiefs of staff across every sector more effective in accomplishing a singular directive; providing the necessary support to assist his or her principal in accomplishing their agenda.

Furthermore, I would like to thank all the contributors for this inaugural edition of Chief of Staff who brought forth valuable insights to a profession I dedicated much of my adult life to and provided me with the opportunity to serve the American people as a Cabinet Secretary. I expect these insights to be utilised across the public and private sector, advancing the scope and respect of this role across industries. As such, I look forward to future editions of the journal Chief of Staff and how it will influence and shape the profession for generations to come.



“The enemy of leadership is stagnation”

Ambassador Arthur Sinodinos AO

Ambassador for Australia to the United States



The Chief of Staff Association interviewed Australian Ambassador to the United States, His Excellency The Honourable Arthur Sinodinos AO in December 2020. Ambassador Sinodinos previously served as Prime Minister John Howard’s chief of staff for an incredible nine years. Additionally, Ambassador Sinodinos has served as Australia’s Minister for Industry, Innovation and Science, held the role of Cabinet Secretary, Assistant Treasurer and Senator for New South Wales in the Australian Parliament from 2011 to 2019.

Interviewing Ambassador Sinodinos was three time New York Times bestselling author, Keith Ferrazzi. Keith has spent nearly the past 20 years coaching executive teams on the most effective leadership styles, and most recently, published a book called ‘Leading Without Authority.’ His process is so transformative he had to invent a new word in order to properly capture its impact, Co-Elevation, which describes leadership as a team’s commitment to one another and the mission at large.

KF: In your perspective, as a former chief, what differentiates an amazing chief of staff from someone who is not?

AS: First and foremost, a chief of staff must be able to organise a team in support of their principal. This is the aspect that can often prove tricky for chiefs of staff as it requires one to sublimate their ego. What I mean by this is that when choosing a team you do not select people based on their loyalty to you, or worry about them having a stronger relationship with your principal, or worry that they are more talented than you are. The reason being, your most important function as a chief is supporting the implementation of your principal’s agenda for the given enterprise. As such, when selecting your support staff you must choose those who are the most qualified to support you in carrying out the successful implementation of your principal’s agenda. This leads me to my next and most important point, you must keep things moving. The enemy of leadership is stagnation, and so if you allow any one topic or issue to hijack the agenda it will bring everything else to a halt.

KF: Can you provide me with an example of how you utilise the skills you just described and translated them to the current leadership position you now hold?

AS: That’s an interesting question, because as a chief of staff your job is to focus on the implementation of the agenda or mission, as a leader however, there is an extra wrinkle to your job in that you also must keep everyone focused and believing in the mission and its importance. Now, I arrived at my post in February just before the outbreak of COVID and so a month into the job I was already facing a situation that no living Australian Ambassador to the US had ever faced before, which meant I couldn’t ask anyone for advice. Further to that, it



was a situation that no one in the world had ever experienced before which meant there was, and still is, tremendous opportunity for distraction amongst my staff and for them to become fixated on the topic of the pandemic, which would ultimately result in stagnation of the mission we are here to achieve. Thus, my chief concern became how do I keep my team focused and on the same page even in the face of all the uncertainty and distractions that come with the worst global pandemic in a hundred years?

My solution to this was to increase my presence amongst the staff because the more they saw of me and communicated with me the more likely they were to stay focused on the mission. As such, every Monday morning I would have a meeting with all the branch heads from the embassy to clear the deck for the week ahead and ensure that everyone was on the same page and focused on the objectives necessary to the success of our wider mission. Furthermore, every morning I have a meeting with all the branch heads from the Foreign Affairs department of the embassy to discuss the daily agenda and that it is in service to the wider mission at hand. This increased presence and awareness of the operations of my staff provided them with the assurance that even in the face of this great global crisis, their leader was totally focused on serving the Australian community in the US and improving the US-Australia relationship. In turn, everyone here at the Embassy has done an amazing job moving the mission forward and staying focused on the task at hand.

KF: Can you tell me about the transition from chief of staff to leader? What is some advice you would give to those making this transition?

AS: The most difficult part of the transition is that you are no longer the one doing the advising, but rather you are the one being advised. The difficulty of this is that you lose that bird's eye view that comes with being a chief of staff and allows you to give totally sound objective advice at all times. Where this gets amplified is public speaking. As a chief of staff you may advise your leader to say x, y and z and from your bird's eye view it is perfectly sound advice. However, as a leader you take that extra second to think about whether you are ready to own such a statement publicly. Thus, as a leader it is paramount that number one you know what you stand for privately and are willing to be accountable for that publicly. Number two, you must surround yourself with those who also know what you stand for and who will give objective advice based on that, regardless of whether or not you want to hear it. Essentially, your advisors must hold you accountable to the same veracity that the public will.

KF: Is there a story you have that brings this point home?

AS: When I was in the senate and working as Assistant Treasurer I had to stand down because of investigations going on in my home state. With this obviously came stress and emotion that coloured any reaction I had to news and decisions regarding the matter. As such, because I couldn't necessarily rely on my own ability to be objective at the time I had to rely on my advisors. Mind you, it is not easy trusting others with a matter that will ultimately only reflect negatively on you should they screw up. However, the best leaders are able to recognise when their own judgement may be clouded by a situation and pivot their decision making to rely more on their advisors, who were hired for exactly those instances.



KF: If you were putting a curriculum together what are some of the most important competencies you would coach chiefs of staff around?

AS: The first competency that is essential for a chief of staff is prioritizing. As a chief of staff your leader's time is in high demand and it is up to you to decide what demands his attention. Additionally, your time is in high demand and you need to have the capacity to decide what demands your attention. As such, it is up to you to decide which objectives are most critical to your leader accomplishing their agenda as those are the ones that require their attention. Outside of that, you must understand which objectives you can accomplish on your leaders behalf and anything beyond that should be delegated to the appropriate person.

The second competency is being able to act as a sounding board. Leadership is a lonely endeavour and oftentimes leaders need to get something off their chest, bounce ideas off of you, or even just know there's someone there who understands what they're going through. As a chief of staff you must be able to accommodate all these needs and give sound advice based on what they have told you. Essentially, what you need to be is a trusted confidante that your leader can trust implicitly to keep what was said between the two of you and give sound advice pursuant to that.

The third critical competency is having an eye for personnel. As I said previously, oftentimes you must be able to delegate critical parts of the mission strictly due to constraints on your time and your leaders time. As such, it is imperative that you have people working for you that you can trust to get the job done. Since oftentimes, it falls on the chief of staff to hire the support staff, it is crucial that you have an eye for personnel and an understanding of what qualifies people for certain positions. Building off of this, you must also be able to have hard conversations with people if you feel they are not up to the job or are underperforming. It is important to understand that you are not a chief of staff because you have your own agenda, you are there to support and implement the agenda of the leader you subscribe to. For this reason, you must always be prepared to address people or issues that are hindering you from carrying out your duty and deal with that accordingly.

KF: Thinking about competencies in more of a tactical sense, are there any unique skills a great chief of staff must possess?

AS: The ability to diffuse a situation. Sometimes this is done with humour, sometimes you say leave this with me and I'll take care of it, other times you address the situation head on. It is of utmost importance though that you have the capacity to recognise when a situation needs to be diffused and what is the right strategy to do so. If you fail to do so, the situation will permeate and prevent you from moving the agenda forward. Going back to one of my previous points, do not let the situation stagnate, keep things moving.

KF: What advice would you give to executives relative to chiefs of staff and are trying to decide whether or not they need one?

AS: Well it certainly depends on personal taste, preference and leadership style. What I would say to them though is that if you value having a trusted confidante who understands you and



what you're trying to achieve then a chief of staff can be extremely beneficial. The best chiefs of staff can help run your personal and professional life and ensure that your priorities are being dealt with. They are able to do so because they understand your voice and can communicate in your voice on matters of importance when you are not able to be there to do so yourself. Therefore, if you are creative there is a lot one can do with such a role.

KF: Conversely, what advice do you have for leaders relative to chiefs of staff, so far as what are the biggest mistakes that they make with chiefs of staff?

AS: When a leader silo's things. In order for the relationship to work the chief of staff must have the authority to roam across all the responsibilities of their principal. I used to say in the Prime Minister's office that the smallest thing can bring a Prime Minister down. This brings me back to what I said about how chiefs of staff have a 'birds eye view' of the implications of their leader's actions and responsibilities and therefore are able to provide sound objective advice based on that. The leader however must allow them to do so.

KF: Do you feel that due to the digitization of the world due to the COVID-19 pandemic, that the nature of the chief of staff role is changing?

AS: That's certainly a good point as a lot of what we know about the chief of staff role requires 'being in the room.' But again ultimately it comes down to how the leader decides to utilise the chief of staff role. Even in this virtual environment a lot of things I previously mentioned such as, the hard conversations, dealing with personnel and communicating on one's behalf, could be handled by an effective chief of staff. So it really does just come down to that relationship between the leader and the chief of staff, and what they make of it.

KF: Any advice to chiefs of staff on 'leading without authority'?

AS: It's about communicating with influence and recognising that there's only so much you can do to direct people and at the end of the day you have to have the ability to bring people with you. To do so, you must understand the people you work with, how to communicate with them, what their drivers are, how to get all the varying personalities on the same page and working towards the same common goal. One such way is to develop a process for achieving those objectives and getting people to buy into that process with the belief that it will deliver results. The final element of 'leading without authority' that I would mention, is the power of your example and whether you live the things that you are seeking of others.



Interviewer - Mr Keith Ferrazzi

Keith Ferrazzi is recognized as a global thought leader in the relational and collaborative sciences. As Chairman of Ferrazzi Greenlight and its Research Institute, he works to identify behaviors that block global organizations from reaching their goals and to transform them by coaching new behaviors that increase growth and shareholder value.



A New York Times #1 best-selling author of *Who's Got Your Back* and *Never Eat Alone*, as well as a frequent contributor to *Harvard Business Review*, *Forbes*, *Fortune* and many other leading publications, Keith's gained over 20 years of experience, from the C-Suite to founding his own companies, and distilled those years and experiences into practices and solutions he brings to every engagement.





Why Integrity Matters: a Dive into Kosovo, a New Democracy with Health Issues

Ms Besianë Musmurati

Chief of Staff

Secretary General of the Democratic Party of Kosovo

Kosovo is literally the youngest country in Europe. The youngest country with the youngest population, where the median age is just at 29 years old. This was the first thing I used to tell people about Kosovo during my time as a diplomat in Washington D.C. and Brussels. To understand Kosovo's progress, you have to understand its history and its people.

To give you some perspective, about four decades ago, my father was sentenced to thirteen years in prison in Yugoslavia simply because he was a professor who was printing and distributing books in the Albanian language. This was the life of an average Kosovar family back then - facing oppression and economic uncertainty.

The 1998-99 war was the culmination of several decades of systematic oppression of Albanians in Kosovo. We declared independence in 2008 with the help of some of the world's biggest western democracies, countries and allies that helped us build ourselves up during and after the war. Having this in mind, Kosovo is the most pro-American country in the world¹ and among the leading countries in the region where membership in the European Union is still widely popular². We have emerged as a young democracy looking up to the West, however, we still face regional challenges.

Young democracies face great risks and volatility, which means that the leaders in charge can either push forward progress or hold it back. For this reason, I decided to quit my job as a diplomat and accept the



position as a Chief of Staff to the Minister of Health in 2018. Promoting Kosovo as a diplomat was great, but I wanted to continue my public service in a position that would allow me to have a direct impact on the daily lives of my fellow citizens. Helping the Minister of Health, an ambitious and well-prepared Harvard alum, to reach policy and development goals was a perfect choice.

I joined his team as Chief of Staff because the healthcare system was never a priority of political parties in Kosovo. It was the first time ever that we had a young and bright politician who really wanted to improve a devastated sector, fight corruption and break up monopolies in healthcare. It was a decision based on shared vision and common values and most definitely one I will never regret.

Back in 2013, I had conducted the first ever study on ministerial advisers in Kosovo, including the role of the chiefs of staff. I found out that the fine line between political staff and civil servants in Kosovo is quite clear, where the former are in charge of overall policy development, while the latter implement policies. I found out that Chiefs of Staff are the people who move things, shape policies, and are able to really have an impact on people's lives.

Improving healthcare in Kosovo is a tough job. Kosovars, on average, live 10 years less than their European peers and approximately 80% of the households in Kosovo incur out-of-pocket (OOP) payments for healthcare. In this group, lower-income families spend a greater share of their consumption expenditures on healthcare, most of which is to buy drugs. OOP health payments increased the poverty headcount by 22.21%. This means that some people in Kosovo have

to choose between their next meal or their prescribed drugs.

Seeing that high drug prices were exacerbating poverty, the Minister of Health decided to focus on this issue. Kosovo inherited the Semashko model of healthcare delivery, where the central government serves as the purchaser as well as the provider of healthcare services. This means that the Ministry of Health, through a List of Essential Medicines, provides people with free drugs when they access public healthcare institutions.

We found out that as a result of non-competitive behavior, abuse of procurement procedures, and the lack of price regulation on the purchasing of medicinal products, for nearly two decades, millions of euros from the state budget were mismanaged. As a result, Kosovo's citizens were paying at least €10 million more annually for the same drugs than their peers in the region.

After a thorough policy analysis and consultation with WHO experts, we established rules and methodologies which compared drug prices of the same products in different EU and regional countries and applied it to Kosovo. The results were astonishing.

Just in the first year, we saved €6 million although we procured the same amount of drugs. For example, a drug that was bought for €30 was now being bought for €2.8. The money saved was used to buy new beds for the public hospitals and to improve overall service.

The procurement of hemodialysis products marked one of the major fights against the abuse of public money. In 2018, the Ministry

¹Rating World Leaders: What People Worldwide Think of the U.S., China, Russia, the EU and Germany Report, Gallup, 2020.



of Health of Kosovo dismantled a 20-year monopoly on hemodialysis drugs. By opening the market for free competition, in just one contract we managed to save over €2 million of taxpayer money.

Witnessing this, the Minister of Health introduced the first ever legislation in Kosovo for regulating drug prices. The effects of the policy which we introduced will ultimately enable the Ministry of Health in Kosovo to provide health protection and access to safe, effective and quality drugs – at a reasonable price without putting to risk the safety, effectiveness, and quality of products. It will help Kosovar families to have access to drugs without having to sacrifice their meals.

And ultimately, this is what good governance is all about. It is about introducing standards that increase the well being of people. I have been lucky to witness this first hand. Enthusiastic, hard-working leaders can bring about change. While they lead with vision and clear goals, chiefs of staff facilitate and amplify their reforms.

Kosovo's long road to independence was shaped by leaders with integrity who stood up for freedom. They have successfully managed to create a democratic country that respects human rights as the young republic moves toward European integration. It is up to this generation of leaders to continue the progress with integrity. My story is one of many other chiefs of staff, who have worked aside great leaders and left a mark in their country.

Short bio:

Besianë Musmurati is currently chief of staff to the Secretary General of the Democratic Party in Kosovo. In 2017-2020 she served as a chief of staff to the former Minister of

Health. She also served as a Kosovo diplomat in Washington D.C. and Brussels. Prior to that, Besianë worked at the American Chamber of Commerce in Kosovo. She holds a masters degree in European Politics and a bachelor in Public Policy and Management.

²Balkan Barometer 2020 Report, Regional Cooperation Council, 2020.



Family, Faith and Service

A Profile of Mr Justin Harding

Chief of Staff to the Governor of Utah (2014-2021)



An Unconventional Path

Justin Harding's story exemplifies that there remains no conventional route to a career as chief of staff.

Hailing from Cedar City, Utah, Justin spent much of his early life in the small farming village of Minersville. He attended Beaver High School and spent most of his time working for his uncle's floor covering business, which he admitted was the "extent of [his] ambition" as a young man.

After graduating in 1993, Justin enrolled for College at Southern Utah University but quickly found the adjustment to study difficult. Deciding that he was unprepared for college, he took the opportunity to work as a missionary for his local church, The Church of Jesus Christ of Latter-Day Saints. Justin's two-years of service with the mission in New York instilled in him a greater sense of purpose and an appreciation for the value of diligence.

He returned to Southern Utah University equipped with more developed study habits and this time completed his degree. But Justin's sights remained firmly set on taking over his Uncle's business. In the summer of 1998, Justin met his wife, who pushed him to be more ambitious with his career direction.

When an opportunity arose to join Congressmen Jim Hanson's office as an intern in the fall of 1999, Justin's unconventional path to a career in the Public

Service began.

Entry into the Public Service

Recently married, Justin moved with his wife to Washington D.C in the spring of 1999. Justin's role as an intern at Congressman Hanson's office laid the foundation for his career in the Public Service, but it was also where he was first introduced to the role of a chief of staff.

Impressing as an intern, Justin was invited to return to work as a Legislative Assistant full-time. He worked closely with Nancee Blockinger, Chief of Staff to Congressman Hanson, whom he credits for taking a chance on him as an intern back in 1999.

Justin spoke of his admiration for Nancee, particularly her ability to act as the "master of his [Congressman Hanson's] universe", a respected principal and "the person who seemed to run the place". While Justin revered Nancee's effectiveness as a chief of staff, he admitted that it was not a position he ever aspired to hold.

After serving for two years as a Legislative Assistant, Congressman Hanson's retirement compelled Justin to move into a new role as Legislative Director to Congressman Rob Bishop, a position he would go on to hold for six years.



Becoming a Chief of Staff

After serving six years in Congressman Bishop's office, Justin was presented with an opportunity to become chief of staff to the recently elected U.S. Representative to Utah, Jason Chaffetz. As a former chief of staff himself, Jason was aware of the skills and competencies required to be effective in the role.

He spoke of the importance of managing personalities and identifying those who would provide good counsel. Practically, too, he prepared Justin for the importance of building close stakeholder relationships, particularly with Utah's state emergency managers.

After six productive years working for Representative Chaffetz, Justin accepted an offer to become chief of staff to Utah Governor Gary Herbert. Although he experienced significant professional development as a congressional chief of staff, life in a gubernatorial role would be a new but exciting challenge.

Transition to the Governor's office

While his role as congressional chief of staff presented its unique challenges, Justin recalled that it had a "predictable and natural rhythm".

But he quickly realised that working for the Governor's office was a stark change of environment. He noted that "the levers of power were very different", the Governor was not constrained by legislative powers.

However, the authority to exercise executive influence made for a much more fast-paced work environment. Justin went from managing a small twenty-person team to holding responsibility for a twenty billion dollar, twenty-four thousand-person enterprise. But he was not deterred,

describing the "truly astounding velocity of work" as "surprising but pleasant".

When asked for his views on some of the most critical skills required of a chief of staff, Justin emphasised the importance of being able to manage crises competently and with leadership. He called this managing 'The Fire Drill'; encompassing both the ability to proactively mitigate risk, but also to act swiftly in a crisis. Justin credits Jason Chaffetz for teaching him how to be calm, responsive and call on the right people in critical situations.

Challenges and Achievements

During Justin's 21-year career in Public Service, he faced many professional challenges. A career in politics produces inevitable moments of frustration. But when we asked him about some of his most memorable moments as chief of staff, he described a career in which the achievements and accomplishments far outweighed the bureaucratic challenges and frustrations.

In 2014 after being appointed as chief of staff to Governor Herbert, the Governor's office worked together with a broad cross-section of stakeholders to pass the first state-level non-discrimination bill in the country. In only his first legislative session, Justin helped the governor facilitate a bill that protected the rights of the LGBTQ+ community while balancing the concerns of the faith-based community. "It was one of those remarkable moments when Utah stood out and was a leader", he said, and it is an achievement that still resonates with him today.

However, not all of his legislative accomplishments were achieved with such haste. Justin characterised his experience supporting the Governor's push to expand Medicaid to at-risk populations in Utah



as a defining challenge of his career. The Governor's office was constantly stymied by the politicisation of the issue at a federal level and uncertainty in the judiciary. Such was the immensity of the challenge that Justin and the governor often turned to their faith for support - prayer helped them to remain focused and resolute in their efforts to help vulnerable members of their community. After years of fighting, the Utah State legislature would go on to pass a bill that closely replicated what the Governor and his office had been pushing for years. It represents one of the most challenging and rewarding periods of his career.

Sacrifice

Justin characterises the chief of staff role as one of the “most remarkable and enjoyable positions in the state government”, but noted that it is “designed to be time-limited”. For this reason, he implores any chief of staff to “enjoy every moment”.

Being a chief of staff is a rewarding, but demanding role, Justin says. As a loving husband and father of six children, he had to make daily sacrifices in his personal life. As a close confidant and advisor to the Governor, he could be called upon to serve at any moment.

One afternoon he had taken his family for an afternoon at an amusement park, only to be called into action when a wildfire took hold in Southern Utah. Justin was tasked with quickly coordinating the state's emergency response, describing his children's elation at seeing him take off from the South Lawn of the Capitol in a Blackhawk as he joined the governor to survey the fire-affected area. While the role necessitates its share of sacrifices, Justin's children and family were always immensely proud of his commitment and service to the people of Utah.

Looking Ahead

The conclusion of Governor Herbert's third-term in January has brought an end to Justin's service as the longest-standing gubernatorial chief of staff. Justin is now concluding a transitional role as a Senior Advisor to the newly-elected Governor, Spencer Cox.

He is looking forward to his next venture as Pennsylvania/Philadelphia Missionary President to the Church of Jesus Christ of Latter-Day Saints. As a man of great faith, he is excited about giving back to his faith-community and joining his wife to lead over 200 young missionary volunteers across forty congregations in the region.

The Chief of Staff Association extends its deepest gratitude to Justin for taking the time to share his story with our growing community. We wish Justin and his family all the best in their future endeavours and are confident that his exceptional leadership will be of immense value in whatever capacity he chooses to apply it.



Chief of Staff, Loyalty in Service

A Profile of Mr Clark Mercer

Chief of Staff to the Governor of Virginia (2019 - Present)



Born and raised in Alexandria, Virginia, Clark Mercer comes from a family of waterman, fisherman and oyster, tobacco and dairy farmers. But his family's connection is in large part as a result of the pursuit of roles in the public service. In the 1930s, Clark's paternal grandfather joined the Air Force and was stationed at Fort Myer in Arlington, Virginia. Meanwhile, his maternal grandfather came to Virginia in a role with the Department of Agriculture.

Clark envisioned a career in public policy from a young age. He began his college experience at Yale University, choosing to study law because it "seemed like the thing to do if you wanted to work in public policy". Clark graduated from Yale and returned to Virginia where he volunteered for local campaigns and sat on local boards and commissions. Shortly after, he enrolled in graduate school at The George Washington Institute of Public Policy. It was here that he developed an interest in working for local and state government.

A return to Washington DC reunited Clark with his old high school, where he coached the school's soccer team for seven years while studying public housing policy. Clark's experience as a coach equipped him with many transferable skills. He believes that people like to use sports catchphrases because they are applicable to many workplaces and aspects of life. Moreover, to be a successful leader in a sports team you need to set high expectations, be good

at goal-setting and most importantly, demonstrate that you are willing to do the work yourself. The same is true in the chief of staff role.

Early Career

After completing his graduate studies, Clark worked as a consultant in the private sector and the government before moving into a role with Senator Mark Warner in his first run for the US Senate. Having observed how the defence industry works during his time as a consultant, Clark gained an interest in defence reform policy. As Clark's role in Senator Warner's senatorial run was coming to an end, Senator Jim Webb was beginning the second iteration of the Commission on Wartime Contracting. The commission would be the second in US history, the first examined WW2 defence contracting during the Truman administration. This time, the commission would look at all overseas defence contracts in Iraq and Afghanistan. Clark would go on to work on the commission for three years.

As the commission concluded, Clark had his firstborn child. Looking for a fresh start, he moved with his wife, a career public servant who had worked for Senator Warner for 13 years, from Washington DC to Richmond. It was here that Clark first met then-candidate for Lieutenant Governor, Ralph Northam. Clark volunteered as Northam's opponent in debate prep, a role he described as "interesting but awkward". When Northam was successfully elected as Lieutenant



Governor, he asked Clark to stay on as his chief of staff, a position he has now held for seven years.

In 2017, Northam ran a successful campaign in the gubernatorial election, but Clark admits he wasn't sure if he was going to be kept on. At the press conference announcing his election win, Clark prepared Governor Northam's transition remarks, which included major announcements about who would serve as his transition director. At the end of the governor's scripted remarks, Northam surprised Clark by announcing that he would be staying on as his chief of staff.

The jump from Lieutenant Governor, a part-time role with a staff of only three people, to the Governor of Virginia, which has 100,000 commonwealth employees, was immense in both "scale and scope". To prepare himself, Clark invited as many senior chiefs of staff as he could to join him for dinner in Richmond. At that table were chiefs of staff for both Republicans and Democrats. Clark listened and absorbed as much of the information as he could in what he described as a "long dinner...several hours long".

Achievements, Challenges and Virginia's One-Term Model

Clark and Governor Northam faced the immediate challenge of navigating Virginia's one-term model. Clark described the difficulties of having a governor inaugurated within the first few days of his first of four legislative sessions. It is a model that is "by design to put the executive branch a step or two behind". But they had an advantage, Lieutenant Governor Northam sat on previous Governor Terry McAuliffe's cabinet. Consequently, he had already built the relationships and understanding of the multi-tiered bureaucratic structures that would normally take incumbent governors months to grasp.

As a paediatric neurologist, Northam has what Clark describes as an "interesting but effective" managerial style. He does not micromanage Clark's schedule and instead works with him to set goals before giving him the space to achieve them. Northam's effectiveness as governor, Clark explains, is greatly influenced by his background in medicine - "at the operating table, you can't afford to have an argument and leave, you have to work together to get things done". It is this same attitude that Northam brings to governing, and it is why Clark believes he doesn't get caught up in the "DC gridlock" that consumes many politicians.

Clark has many achievements as chief of staff. During his tenure, they have succeeded in increasing the minimum wage, made the state a leader in clean energy solutions and regained Virginia's title as the best state in the country for business. Clark is particularly passionate about Virginia's potential to become a US leader in clean energy. He travelled with a delegation to Denmark to learn how Virginia could harness the power of offshore wind.

Like Justin Harding and Will Lawrence, Clark emphasised the successful legislation of Medicaid expansion as both his proudest achievement and greatest challenge. He vividly recalls when a Republican senator moved a motion in support of their proposal, a moment when he and the governor realised that they would be able to pass the historic bill. As a result of the legislation, 400,000 additional Virginians now have access to Medicaid. These successes would not have been possible if it weren't for, in Clark's words, "tenaciousness... and not a lot of vacations".

Clark has now been a chief of staff for seven years. It is a role that he says is as much about listening as doing. He advises aspiring



chiefs of staff to always try and be better listeners, to take a step back and not be rushed into decisions, to become adept at filtering information to your principal and to ensure that you are “including the right voices in the room”.

The chief of staff role, particularly in politics, can become all-consuming. Clark has learnt to always put things in perspective. It is easy, he explained, to get wrapped up in certain issues. But he always remembers, as Governor Latham puts it, that “the sun will come up again tomorrow and we will deal with whatever comes”.

The Great Balancing Act of a Chief of Staff

A chief of staff is constantly balancing interests in their professional life. Given the demands of the role, the same is true in their personal life. Clark, however, is in a unique position. His wife Kelly is a career public servant, serving both Governor McAuliffe and Northam as Secretary of the Commonwealth. In this role, Kelly handles all board appointments, pardons, extraditions and paperwork issues.

Virginia is one of two states that require convicted criminals to petition the governor for the restoration of their civil rights upon their release from prison. Kelly has her name on more restoration orders than anyone else in US history. Clark says he is lucky that he has a partner who understands his role and can empathise with the demands of a public servant.

But balancing their demanding roles with the commitments of tending to a young family isn't easy. They are fortunate that Governor Northam has always run a “family first policy”, implementing one of the most generous leave policies in the country.

While he isn't sure what comes next, he knows that he wants to continue working in the public service. For now, however, he is focused on helping those within the governor's office work out what's next for them.

The Chief of Staff Association extends our best wishes to Clark and his family. We greatly appreciate his contribution to the first edition and congratulate him on his commitment and dedication to the chief of staff profession.



The Power of Coalition Building

A Profile of Mr Will Lawrence

Chief of Staff to the Governor of Kansas (2019-Present)



Will Lawrence was destined for a career in politics and public service. Will's father was a career public servant, working in the legislature as a Republican while he was in elementary school. He had the unique experience of being introduced to politics at a very young age.

Will grew up in Burlington, a small town in east-central Kansas of around 2500 people. He attended college at Washburn University and studied law, but had an acumen for politics, running for Body President in the Student Senate. It was here that Will was first introduced to the role of chief of staff, but admits he didn't think much about the role until he began working in the Kansas legislature years later.

While at college Will completed several internships. His first opportunity came as an intern in the Constituent Services Office for Kansas' Democratic Governor, Kathleen Sebellius. It was rare for Kansas, historically a Republican stronghold, to have a Democratic governor. Will continued to gain experience, interning for the Attorney-General and the State Treasurer in various divisions before receiving an opportunity in the office of Senator Laura Kelly. It was here that he "first got [his] foot in the door".

Will went on to receive an offer to work for Senate Minority Leader Anthony Hensley as his Legislative Director. Senator Hensley has spent his whole career dedicated to Kansas politics. Elected to the House at just

twenty-three years old, Hensley has now spent a total of forty-four years working in the legislature, twenty-four of those as Senate Minority Leader. Will formed a close relationship with the Senator, and after five years he moved into the role as his chief of staff.

Navigating Party Politics

After seven years working for Senator Hensley, Will accepted an offer to work as chief of staff to the office of the now Democratic Governor of Kansas, Laura Kelly. At just thirty-three years old, Will remains one of the youngest gubernatorial chiefs of staff in the country.

Governor Kelly had the difficult job of trying to govern a 'red state' as a Democrat with minority representation in both the House and the Senate. Will garnered a reputation for successfully building coalitions with Democratic and Republican leaders, overcoming the limitations of minority representation. Growing up in a Republican household, Will says he has gained a unique perspective on the state's largely conservative interests. While he represents the interests of the Democratic party, he respects and can relate to the concerns of those from across the aisle.

During his time working for Senate Minority Leader Hensley, Will quickly learned that to be effective he would have to build relationships with those within, and outside



of his party. His first experience with bipartisanship was necessitated by issues relating to redistricting. To have any success in legislating mapping changes, he and the senator would have to work with a cross-section of moderate Republicans and Democrats. It was here that he learned that you cannot afford to have enemies in the role. While you may have adversaries on certain issues, he said, it is critically important that you can build productive relationships and find common ground.

With Governor Kelly, Will has faced even greater challenges that have tested his capability for coalition building and bipartisanship. In Governor Kelly's first session, Will worked with her to successfully pass school financing measures that would end a period of damaging litigation. It was a significant achievement, particularly given Governor Kelly had built her reputation as the "education governor".

But the real test came in the battle for Medicaid expansion. If Will and the governor were to succeed in passing Medicaid expansion relief they would have to work closely with the Republic Senate Majority Leader, who had previously blocked their efforts in the Senate.

Over the course of winter and into fall, Will worked closely with a cross-section of stakeholders, Republican and Democrat, to create a favourable environment that could facilitate negotiations between the governor and the Senate Majority leader. Will often worked with counterpart chiefs of staff from across the aisle, highlighting it as a particularly effective way to cut through party tension.

When the time came for the governor and Senate Majority Leader to meet, Will remained uncertain about how fruitful it

would be, given Medicaid's politicisation. Setting sixty minutes for the meeting, Will admitted he was nervous that all their hard work would culminate into a five-minute meeting that only served to reinforce party divisions. Instead, the meeting went on for two and a half hours. At its conclusion, the governor and Senate Majority Leader had agreed to a fully compromised bill with all language agreed upon. The ensuing public announcement was described as "historic". While the bill has yet to formally pass, made more complicated by the restraints of the COVID-19 pandemic, the negotiations remain a historic achievement, and Will hopes they will be able to successfully have the bill passed in the coming months.

Advice for Aspiring Chiefs of Staff

When Will first came into the role of a chief of staff he understood that it would require significant sacrifice. Managing a demanding schedule, long-hours and mitigating risk during a global pandemic have become realities of his job.

Will admitted he did not fully appreciate the amount of emergency management that would be required in his role. In his first year, he was tasked with managing historic flooding and frequent tornadoes. He believes that the ability to remain composed during times of crisis is a key skill for a chief of staff.

Will has learnt that to be a successful chief of staff in politics, it is important that you can balance competing demands and interests. In the face of tumultuous and fractured politics, he continues to have conversations. During the COVID-19 pandemic, this has proven to be a particularly difficult task. Mask mandates have been unpopular in Kansas and led to calls for the executive authority of the governor to be taken away.



Despite these divisions, Will emphasised the importance of retaining lines of communication with other chiefs of staff, the cabinet, federal delegations and the legislative body. Building these relationships remains central to his effectiveness in the role. He has built a reputation of “speaking truth to power” and being an honest broker. This means telling your principal if you think something is not a good idea, not being afraid to push back and being honest and truthful in your dealings with stakeholders.

Finally, Will articulated the importance of occasionally taking a step back. The chief of staff role is demanding. It is easy to get caught up in its face-paced nature, but this risks getting lost in the turmoil of what is happening around you. Find the time to block out the noise.

Future Aspirations

Will continues to enjoy his role as chief of staff to the governor. He hasn’t given much thought to what might come next, but at thirty-three years of age, he still has many years of service. A chief of staff’s skill set is by design transferable to roles across a variety of sectors. But politics is in his blood, and for now, Will remains determined and committed to being the most effective chief of staff that he can be.

The Chief of Staff Association sincerely thanks Will for taking the time to tell us his story and share his experiences. We are sure that there are many among our readership who will find Will’s story inspiring and his insights extremely valuable for their future aspirations in the role.





The Chief of Staff in the Contemporary White House

Professor David B. Cohen

Professor of Political Science
Interim Director, Ray C. Bliss Institute of Applied Politics
The University of Akron

Professor Karen M. Hult Professor Charles E. Walcott

Professor of Political Science
Virginia Polytechnic Institute & State University

“His deep, varied experience and capacity to work with people all across the political spectrum is precisely what I need in a White House chief of staff as we confront this moment of crisis and bring our country together again.”

- President-elect Joe Biden on Ron Klain, incoming White House Chief of Staff.¹

¹ Joseph Biden, “Press Release - President-elect Joe Biden Names Ron Klain as White House Chief of Staff Online by Gerhard Peters and John T. Woolley,” November 11, 2020, The American Presidency Project <https://www.presidency.ucsb.edu/node/346784>



I. Introduction

Chiefs of staff to U.S. presidents have been the source of frequent attention. With that spotlight has come a variety of self-described titles, including Sherman Adams’s “abominable no man” and Jack Watson’s “javelin catcher.” Others have characterized the aides as presidential alter egos, the first among equals on the White House staff, and lightning rods for presidential criticism.

The White House chief of staff (COS)—a job first appearing under Dwight Eisenhower—is a critical position that can shape the overall success or failure of a presidency. Scholars have sought to better understand the emergence, evolution, and performance of the post and its supporting office. ²Although the job of chief of staff has many common elements across administrations, key differences almost always reflect differing presidential work styles and preferences about how the office – and the presidency – should operate.

Here, we employ role analysis to focus on the primary roles and activities of chiefs of staff, underscoring their links to presidential governance. ³Our role analysis focuses upon the socially defined expectations that persist over time and across presidential administrations. In Table One we list the chiefs of staff who have served since the beginning of the Nixon administration.

White House Chiefs Of Staff, 1969-2021

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	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	2019-20	Trump	Republican
Mark R. Meadows	2020-21	Trump	Republican
Ronald A. Klain	2021-p	Biden	Democrat

Source: Compiled by the Authors.

II. Roles and responsibilities of contemporary chiefs of staff

Considerable research has examined the variety of roles that chiefs and their immediate aides perform. Several major duties have emerged, capturing among them the key responsibilities of chiefs of staff. We highlight four roles that chiefs typically assume: administrator, guardian, advisor, and proxy. Neither mutually exclusive nor collectively exhaustive, these roles often overlap. For example, effective administration may produce mutually informing flows of advice, while helping guard a president’s scarce time and attention. Other times, the roles may pull in different directions. The chief of staff must frequently say no; yet if other staffers are too consistently thwarted, it may dampen their commitment and suggestions of creative ideas and strategies while encouraging competition fueled by personal ambition.

A. Managerial Roles

Two roles of chiefs of staff—administrator and guardian—encompass myriad tasks. Most fundamentally, the chief is the manager of the White House. Some presidents have tried to become deeply involved in the day-to-day running of the White House organization, but most

²Research conducted by the authors about the COS include David B. Cohen and Karen M. Hult, “The Office of the Chief of Staff in the Trump White House, 2017-2019,” *Presidential Studies Quarterly* Vol.50, #2 (June 2020): Pp. 392-417; David B. Cohen, Karen M. Hult, & Charles E. Walcott, “White House Evolution and Institutionalization: The Office of Chief of Staff since Reagan,” *Presidential Studies Quarterly* Vol. 46, #1 (March 2016): 4-29; David B. Cohen, Karen M. Hult, and Charles E. Walcott, “The Chicago Clan: The Chiefs of Staff in the Obama White House,” *Social Science Quarterly* 93 (December 2012): 1101-26; David B. Cohen, “From the Fabulous Baker Boys to the Master of Disaster: The White House Chief of Staff in the Reagan and G.H.W. Bush Administrations,” *Presidential Studies Quarterly* 32 (September 2002): 463-83; David B. Cohen and George A. Krause, “Presidents, Chiefs of Staff, and the Structure of White House Organization: Survey Evidence From the Reagan and Bush Administrations” *Presidential Studies Quarterly* 30 (September 2000): 421-42; David B. Cohen and Charles E. Walcott, “The Office of Chief of Staff,” *The White House Transition Project*, 2021, Report 2021-20, available at: <https://www.whitehousetransitionproject.org/wp-content/uploads/2020/09/WHTP2021-20-Chief-of-Staff.pdf> (accessed December 23, 2020); David B. Cohen, “George Bush’s Vicar of the West Wing: John Sununu as White House Chief of Staff,” *Congress & The Presidency* 24 (Spring 1997): 37-59; David B. Cohen, Chris J. Dolan, and Jerel A. Rosati, “A Place at the Table: The Emerging Foreign Policy Roles of the White House Chief of Staff,” *Congress & the Presidency* 29 (Autumn 2002): 119-49; David B. Cohen, Justin S. Vaughn, and José D. Villalobos, “Manager-in-Chief: Applying Public Management Theory to Explain White House Chief of Staff Performance,” *Political Research Quarterly*.65 (December 2012):.841-54; José D. Villalobos, Justin S. Vaughn, and David B. Cohen, “Public Management in Political Institutions: Explaining Perceptions of Chief of Staff Influence in the White House,” *Public Administration* 92 (September 2014): 744-760



learn that it is not a good use of their time. Presidents Jimmy Carter and Bill Clinton went through an initial period in which they relied on a “spokes-of-the-wheel” arrangement, which placed them at the center of everything. The two finally accepted that having a strong COS was a better option. Since then, President Donald Trump has been an outlier; he experimented with a weak chief of staff (Reince Priebus), then turned to a stronger one (John Kelly) before dismissing Kelly and returning to something closer to the spokes-of-the-wheel, albeit with a formal chief of staff as a major spoke (Mick Mulvaney, Mark Meadows). Trump chafed at being “managed,” yet his White House likely will not be held up as a model for emulation. Following recommended best practice, President-elect Joseph Biden’s first appointment was Ron Klain as chief of staff.

1. Administrator

At its most basic, the chief of staff as administrator oversees the White House political and policy processes and manages the president’s time and attention. Chiefs of staff are responsible for the operation of the White House Office and often are blamed if processes fail, much as Chief of Staff Denis McDonough and the Obama White House discovered with the flawed roll-out of Healthcare.gov. COS Reince Priebus discovered this on his first full day in the job when Trump ordered the White House Press Secretary into the press briefing room to exaggerate the size of the inaugural crowd. The blowback from this was swift and intense, with much of the criticism targeted at Priebus for not preventing the briefing from occurring. The directors of other White House units, sometimes with the exception of the national security assistant, are expected to report to and through the chief of staff. What has been called the “standard model” of the White House decision making system, based on principles of inclusion and multiple advocacy, operates out of the chief of staff’s office.⁴

At the same time, a chief of staff must protect the president by screening out matters that are not worthy of their time or attention. Leon Panetta, President Clinton’s second chief of staff, is widely credited with more effectively regulating the President’s time by forcing the policy and political processes to go through the Office of the Chief of Staff and be screened by the chief before going to the Oval Office.

In addition, chiefs of staff are responsible for numerous other administrative tasks, including selection and guidance of White House personnel, staff organization, and controlling flows of people and communications. To pursue these, most chiefs of staff rely, on the one hand, on the overall White House hierarchy that their office directs. Specialized, typically hierarchical subsidiary structures gather information and issue guidance. These arrangements contribute to helping ensure staff accountability and consistent administration messages.

³ This article is an updated version of previous published research by the authors and is part of a larger ongoing research project; see, David B. Cohen, Karen M. Hult, & Charles E. Walcott, “White House Evolution and Institutionalization: The Office of Chief of Staff since Reagan,” *Presidential Studies Quarterly* Vol. 46, #1 (March 2016): 4-29; David B. Cohen, Karen M. Hult, and Charles E. Walcott, “The Chicago Clan: The Chiefs of Staff in the Obama White House,” *Social Science Quarterly* 93 (December 2012): 1101-26.

⁴ Cf. Charles E. Walcott and Karen M. Hult, “White House Structure and Decision Making: Elaborating the Standard Model,” *Presidential Studies Quarterly* 35 (June 2005): 303-18.



On the other hand, such channels often are complemented by regular meetings of administration officials, located within and outside of the chief of staff's office. These sessions also serve as venues for exchanging intelligence, dividing work, issuing orders, and at least quasi-resolving disagreements. They can range from daily meetings of the "senior staff" to less frequent "planning group" sessions to "issues lunches." For example, under President Obama, Chief of Staff McDonough presided over daily half-hour meetings of the senior staff at 7:45 a.m. followed by a larger meeting of approximately 30 senior and mid-level aides; at these sessions McDonough directed staffers to take specific actions, which he closely monitored to assure their completion.⁵

Among the challenges of relying on such mechanisms is assuring that they include key participants who contribute relevant information and ideas. Obama COS McDonough and Deputy Chief of Staff Rob Nabors, for instance, met routinely with department secretaries and their deputies to explore activities that did not require legislative action. Not including relevant parties in decisions and planning can be costly. President George W. Bush's press secretary, Scott McClellan, unknowingly passed along misinformation to the press regarding the CIA leak case because he did not participate in important meetings, all but destroying his credibility as a spokesperson.

Reliance on hierarchical structuring as an administrative tool also involves challenges, as the shift in the chief of staff position from Mack McLarty to Leon Panetta under President Clinton, from Rahm Emanuel to William Daley under President Obama, and from Reince Priebus to John Kelly under President Trump suggest. For example, when Kelly took over for Priebus in August 2017, he moved quickly to serve as a sentry at the Oval Office revolving door, install staff discipline, and bring more order to a chaotic White House. Although at the outset it appeared that Kelly would succeed in professionalizing the Trump White House and managing the President's time, he ultimately failed, particularly because Trump, himself, resisted Kelly's efforts.

At the same time, chiefs of staff vary in the attention they pay to administration. Andrew Card and Joshua Bolten, George W. Bush's chiefs, were omnipresent in most significant policy discussions, including those on foreign policy and national security; they also sat in on meetings others had with the President. Other chiefs of staff such as Reince Priebus, Mick Mulvaney, and Mark Meadows, working for the notoriously undisciplined Donald Trump, took more hands-off approaches. Moreover, throughout the Trump presidency, a number of staff and administration personnel had walk-in privileges to the Oval Office without the chief of staff or a deputy being present.

2. Guardian

Also part of the chief of staff's job is screening the information, issues, and individuals that reach the Oval Office. Generally, chiefs of staff are charged with protecting the president's time and their interests from an intrusive news media, a bothersome Congress, wayward

⁵ Lloyd Grove, "Obama's Chief of Staff Denis McDonough and Scandals He Faces," *Newsweek* May 23, 2013. <https://www.newsweek.com/2013/05/22/obamas-chief-staff-denis-mcdonough-and-scandals-he-faces-237394.html> (accessed December 23, 2020)].



administration members, or even the consequences of the president's own actions. Chiefs of staff frequently must perform unpopular tasks such as firing personnel, saying "no" to specific requests, and generally acting as the president's enforcer. Thus, Richard Cheney described himself as President Ford's "SOB," while Chief of Staff John Sununu was often called the "bad cop" to President George H.W. Bush's good cop.⁶

Chief of Staff H.R. Haldeman memorably recalled that President Nixon routinely needed to be protected from himself:

Time and again I would receive petty vindictive orders...after a Senator made a Vietnam War speech: "Put a 24-hour surveillance on that bastard." And so on and on. If I took no action, I would pay for it. The President never let up...I'd say "I'm working on it," and delay until Nixon would one day comment with a sort of half-smile on his face, "I guess you never took action on that, did you?" "No." "Well, I guess it was the best thing...."⁷

As President Nixon, himself, later wrote, "A good chief-of-staff is seldom popular. He must carry out tough decisions...that his boss makes but is reluctant to execute... [and] he sometimes finds he doesn't have many friends or supporters."⁸

Chiefs of staff often act protectively on a wide range of issues. Deputy COS Michael Deaver recalls being enlisted to help protect President Reagan:

The first day in the White House, [James Baker] pulled up a chair to my desk and said, 'Look... you and I have got to make a pact here. Those guys in the National Security Council want to get us in a war in Central America. Now, we'll be out of here so fast it will make your head swim if we get ourselves in a war down there. So you need to keep your eyes and ears open, and I do too.'⁹

Less dramatically, early in the Obama presidency, Rahm Emanuel refereed disputes within the Administration over the size and nature of the 2009 fiscal stimulus. A similar pattern appeared in other legislative victories, including the Affordable Care Act during which the Chief served as a frequent lightning rod. Arguably, this was exactly the role of a guardian and the reason Obama appointed Emanuel: to push his legislative agenda forward.

Chiefs of staff are expected never to take credit for White House successes but to take the blame when things go awry. As Carter Chief of Staff Jack Watson famously said, they are supposed to catch the javelins aimed at the president. Chiefs of staff who eschew a javelin-catching role and instead try to avoid blame tend not to remain in the White House, as Trump chief of staff John Kelly illustrates. President Trump's final chief of staff, Mark Meadows, tried another approach, concentrating on communications and domestic policy, much as his immediate predecessor Mick Mulvaney emphasized deregulation and budget savings.

⁶ Cheney's comments appear in Samuel Kernell and Samuel L. Popkin, eds., *Chief of Staff: Twenty-Five Years of Managing the Presidency* (Los Angeles: University of California Press, 1986), pp. 175-6.

⁷ Haldeman, H.R. with Joseph DiMona, *The Ends of Power* (New York: Times Books, 1978), pp. 58-9.

⁸ Richard M. Nixon, *In the Arena: A Memoir of Victory, Defeat and Renewal* (New York: Simon and Shuster, 1990), p.274.

⁹ Interview with Michael Deaver, Miller Center, University of Virginia, September 12, 2002, tape 5 of 7, p.36 (<http://millercenter.org/president/reagan/oralhistory/michael-deaver>).



Other challenges are predictable as presidential reelections approach. James Baker, for instance, reminded the directors of the public liaison and intergovernmental relations operations in the Reagan White House about the coming increases in scrutiny from the new media and Congress, outlining permissible activities and requiring coordination through the chief of staff's office. In contrast, the Trump reelection efforts started almost immediately following inauguration, with campaign-like rallies and travel scheduled mostly in states where he had won significant victories. Throughout the term, Trump Administration officials were the subjects of routine campaign finance and ethics charges.

B. Policy and Politics

Two other roles that chiefs of staff perform emphasize more substantive activities. Chiefs frequently are advisors, presidential proxies, or both.

1. Advisor

Chiefs of staff are usually an important political and policy advisor to the president. As a conduit to the president for much of the rest of the staff and administration, the chief of staff routinely is counseled to act as an “honest broker,” assuring that the president is exposed to a range of relevant opinions and expertise. Still, the chief is expected to hold and share their own unfiltered opinions when the president solicits them. Although relationships between presidents and chiefs of staff have varied, many chiefs have become integral members of the inner circle of advisors to whom the president listens to most closely. This can be crucial, since chiefs often are the last people presidents see before they make important decisions. For example, one recalls that following President Obama's walk around the White House lawn with Chief of Staff McDonough after a national security session on possible U.S. responses to Syria's use of sarin gas, the President decided not to authorize an attack. Chief of Staff James Baker described this critical task as the need to be willing to tell presidents unpleasant truths and to provide counsel “with the bark off.”¹⁰

This would seem to be an inevitable consequence of a chief's ready access to the president. Even chiefs of staff who have sought to be neutral policy brokers still have had to make decisions about the issues and information that would and not go to the president. Even when a COS intentionally seeks not to be an advocate, their judgments about policy and politics may be influential. According to presidential scholar Bradley Patterson, a White House staffer for Eisenhower, Nixon, and Ford, presidents expect chiefs of staff to express their own views while not shutting out or distorting others' perspectives.¹¹ Even so, it is important to put such comments into broader context. Apart from routine duties, the chief's advisory role depends upon their relationship with the president and on the constellations of other advisors in and around the White House.

Additionally, a chief of staff's capacity to serve as an advisor depends on their experience and expertise. A COS who had been a member of Congress—such as Howard Baker, Leon Panetta, Rahm Emanuel, Mick Mulvaney, or Mark Meadows—almost certainly will be a trusted advisor on legislative matters. Emanuel devoted much of his time to serving as policy advisor to President Obama. Not shy about his own opinions influencing policy decisions, he participated in all major policy initiatives, was a valued member of the inner circle, and frequently played



the “bad cop” to the President’s good. Relative newcomers to Washington, particularly to White House positions—such as Donald Regan, John Sununu, Samuel Skinner, William Daley, Reince Priebus, and John Kelly—are less apt to assume this role, at least at the outset. As a former business executive and Secretary of the Treasury, though, Regan frequently presented economic and budget data to the president.

John Sununu and Rahm Emanuel illustrate the reputational risks that chiefs of staff run when they act as advisors. Despite Sununu’s comment that he considered “one of his responsibilities” to be an honest broker, his reputation became one as a policy advocate who frequently was dismissive and intimidating.¹² Similar criticism was leveled at Emanuel, who reportedly confronted difficulties brokering disagreements since he so often was an advocate.

2. Proxy

Chiefs of staff frequently must stand in for the president. They may assume a range of activities, such as meeting and negotiating with members of Congress, speaking to constituency groups, or communicating presidential positions to the media.

Chiefs often serve as liaisons between the White House and Congress. Although many members of Congress crave direct communication with the president, legislators look to chiefs of staff to convey administration policy and presidential preferences. Most recent chiefs have spent considerable time on congressional relations, at least since James Baker in the first Reagan term.

Baker, for example, routinely met with members of Congress to secure support on legislation important to the Administration. Later in the Reagan presidency, COS Howard Baker worked to counter congressional concerns about President Reagan’s control over the administration in light of the Iran-contra findings.

Most modern chiefs, especially those that had been former members of Congress (H. Baker, Panetta, Emanuel, Mulvaney, and Meadows) or OMB directors (Panetta, Bolten, Lew, and Mulvaney) have been the chief budget negotiators for the White House. Nonetheless, during the Trump term, even though Mick Mulvaney served concurrently as OMB director and acting chief of staff, Secretary of the Treasury Steven Mnuchin took the lead in negotiations over the Federal debt ceiling after Speaker of the House Nancy Pelosi publicly questioned Mulvaney’s credibility; later, Mnuchin served as a go-between in the second COVID-19 relief package. Another key dimension of the proxy role is interacting with the media. These relations have evolved gradually. James Baker recalled that one of his predecessors, Richard Cheney, had recommended that he devote considerable time to talking to the news media off the record, a

¹⁰ Terry Sullivan, ed., *The Nerve Center: Lessons in Governing from the White House Chiefs of Staff* (College Station, TX: Texas A&M University Press, 2004), p.39.

¹¹ Bradley H. Patterson, Jr., *The White House Staff: Inside the West Wing and Beyond* (Washington, D.C.: Brookings Institution Press, 2000), p. 353.

¹² John P. Burke, “The Neutral/Honest Broker Role in Foreign Policy Decision-Making: An Assessment,” *Presidential Studies Quarterly* 13 (June 2005): 231.



task at which Baker excelled. ¹³Yet, close to a decade later, Leon Panetta regularly met with the press for both formal and informal briefings on the record. Similarly, chief of staff John Podesta became a visible and public spokesperson for President Clinton and the entire administration during the intern scandal and ensuing impeachment. More than twenty years later, however, as Donald Trump faced his first impeachment, Chief of Staff Mick Mulvaney made few public appearances, leaving it to other surrogates to press the President's case in the media.

The extent and nature of any particular chief of staff's activities as proxy may reflect lack of presidential interest in engaging in these activities, strategic decisions about appropriate expenditures of presidential time and energy, or growing demands for a presidential presence. Such involvement, of course, also likely includes consideration of an individual chief's skills, time, and inclination. Perhaps most critical is the receptivity of those outside the White House to a COS acting as a stand-in for a president. Chiefs of staff are more likely to be viewed as appropriate proxies if they are perceived to be close, trusted presidential advisors who accurately convey presidential priorities and values.

III. PERSONAL STYLES AND ACTIVITIES

Presidents and chiefs of staff come from varying backgrounds and display a diversity of personal strengths, weaknesses, and operating styles. They also encounter widely differing circumstances in the White House. Such factors shape the opportunities and constraints confronting an administration and may well influence the effectiveness of the COS and White House operations.

A. Variety of Approaches and People

The more hands-on approach to many aspects of the presidency of Jimmy Carter, Bill Clinton, and Donald Trump required a different form of staff support than the more hands-off approach of Ronald Reagan. Likewise, the temperament, intellectual curiosity, analytic capability, and decision-making style of the president requires adjustments. Presidents such as Carter, G.H.W. Bush, Clinton, and Obama that could consume and process voluminous amounts of data and information required a wholly different approach from their staff than presidents such as Reagan and Trump who were uninterested or unable to grapple with large quantities of information.

For example, the more wonkish Barack Obama received a President's Daily Brief of 12-14 pages on an iPad, complete with hyperlinks and supporting materials. Donald Trump, notorious for his unwillingness to take deep dives on policy, preferred less frequent and shorter, one-to-three-page briefs composed of bullet points and visuals. Clearly, senior aides must adjust to the temperament, intellectual curiosity, analytic capability, and decision making processes of individual presidents. This takes both time to evolve and does not always happen. For instance, John Kelly's structured approach fit poorly with the impulsive nature of Donald Trump, in a pairing that rarely worked well.

An essential task for a chief of staff is achieving the trust of the president. This cannot be taken for granted and needs to be earned, even when the president and chief have a prior working



relationship. Meanwhile, the COS must forge constructive relationships with other prominent actors in the White House, including the vice president and the first lady, each of whom have their own staffs that must work closely with presidential aides. Leon Panetta, for example, scheduled weekly briefing sessions for first lady Hillary Rodham Clinton. In the Reagan administration, Deputy COS Michael Deaver developed and sustained a strong bond with Nancy Reagan. When Deaver left and Donald Regan became chief, that trust vanished, with dire consequences for Regan.

Chief of staff James Baker has offered a key recommendation, one that is both evident but demanding: chiefs of staff need to be surrounded by the best possible people, as deputies and in other White House roles. If chiefs are too insecure to have capable people around, they are courting failure.¹⁴

B. “You Are Not the President”

Chiefs of staff have enormous power, but that power comes from the expectation that they speak for the president and reflect presidential views. Presidents are elected; chiefs of staff are not. When a chief of staff becomes too taken with their own importance (as happened with, for instance, COS Don Regan), they can forget that their responsibility is to enhance the standing and performance of the president. Similarly, media portrayals that focus on a chief of staff as the key player in the White House (e.g., John Kelly) can corrode trusting relationships with the president and others. Some suggest that former high ranking executives—governors, business executives, military officers—often struggle with this aspect of the job. Used to being principals themselves, becoming the chief of staff requires conscious attention and ongoing adjustments.

IV. CONCLUSION

The roles and tasks of presidential chiefs of staff (and their associated office) are multiple, varied, subtle, and critical to presidential governance. Both those who have held the position and those who have interacted, observed, and studied them tend to agree on several characteristics of successful chiefs of staff.

As an emphasis on management would lead one to anticipate, successful chiefs of staff act promptly to achieve control over the structuring, personnel and decision processes of the White House. In so doing, they need to balance the articulation and enforcement of clear rules and procedures with sensitivity to the possible appropriateness of more informal, fluid, often temporary arrangements (e.g., war rooms, ad hoc meetings) to cope with particular problems or opportunities. Constructive management also involves willingness to delegate work to trustworthy and competent subordinates and to guide that work to assure its timeliness and consistency with presidential priorities.

Second, chiefs of staff need to protect presidents. That involves serving as a gatekeeper, helping assure that presidents have the time, energy, and counsel to focus on key decisions and responsibilities. It may also include compensating for presidential weaknesses, and in extreme cases, ignoring presidential orders or postponing responses.



Third, chiefs of staff (and their deputies) should strive to oversee policy decision processes in as fair and inclusive a manner as possible. Those knowledgeable about, affected by, and critical to, carrying out the decision should be represented and their views fairly presented, probed, and communicated.

Fourth, chiefs of staff must remember they are viewed as speaking for the president. Serving as a presidential proxy does not mean substituting one's own priorities or values for those of the president.

Most critically, successful chiefs of staff work to adapt to a president's approaches to handling information, advice, conflict, making decisions, and interacting with aides, government officials, and others. Just as presidents differ, optimal approaches to working with them differ as well.

¹³ Charles E. Walcott, Shirley Anne Warshaw, and Stephen J. Wayne, "The Office of Chief of Staff," in *The White House World: Transitions, Organization, and Office Operations*, Martha Joynt Kumar and Terry Sullivan, eds. (College Station, TX: Texas A&M University Press, 2003), p.133.

¹⁴ White House Transition Project Interview with James A. Baker, III by Martha Kumar and Terry Sullivan, July 7, 1999.





Walking on a Tightrope: Chiefs of Staff in Foreign Policy

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Abstract

For a chief executive, leader, or top advisor entrusted with formulating and implementing foreign policy, the selection of an effective Chief of Staff (COS) is paramount. With the acceleration of globalization, the development of a multipolar world with competing power centers, and economic interdependence, governing and leading foreign policy in ways that promote stability and prosperity has become an even more challenging and complex endeavor.

This article examines the evolving foreign policy roles played by the COS in coordinating foreign policy staff and advising the chief executive in international affairs. It highlights the different ways in which White House Chiefs of Staff have served the foreign policy agendas of American presidents. The article moves beyond the White House to describe the COS in select government departments and agencies with responsibility for security, diplomacy, and foreign assistance. It concludes by establishing general parallels beyond government and suggests that an effective COS is among the most important resources for a chief executive entrusted with leading foreign policy.



The Chief of Staff (COS) is the principal advisor and staff manager who interacts the most with the chief executive and other officials on foreign policy matters and international affairs. The COS plans meetings between the chief executive and national security, intelligence, and diplomatic officials, manages foreign policy staff, and oversees the foreign policy bureaucracy. The COS is also the gatekeeper of the foreign policymaking process and is often the last person in the room when the chief executive makes key foreign policy decisions. As this article will demonstrate, COS's are the most important and consequential official in government entrusted with advising and coordinating the chief executive's foreign policy agenda.

In particular, the White House COS is the most valuable unelected government official not confirmed by the U.S. Senate. The COS is entrusted with channeling advice and information from foreign policy staff in the White House Office (WHO) and government bureaucracy to the president on issues in U.S. national security, intelligence, diplomacy, and the economy. The COS develops the president's daily schedule and coordinates deputy chiefs of staff, senior political advisors, the Counselor to the President, the vice-presidential COS and the VP's national security advisor, the press secretary, directors of Political, Communications, and Legislative Affairs, and the Office of Management and Budget (OMB). The relationship between the COS and the president's National Security Advisor (NSA), deputy NSA's and National Security Council staff, Secretaries of State and Defense, and Director of National Intelligence are consequential to the chief executive's foreign policy agenda. Other influencers include the National Economic Council (NEC), the U.S. Trade Representative (USTR), and the Council of Economic Advisors (CEA).

The COS informs the president of international crises and, as the gatekeeper, has the power to decide who is in the room to shape national security issues and international economic priorities. Two of the most effective COS were Republican James A. Baker III and Democrat Leon Panetta, who deftly balanced their roles as managers of the WHO and as trusted foreign policy advisors. While this article will examine several advisory modes, the COS was seriously downgraded during the Trump Administration because of strained personal relations between the president and his four COS's and the development of an independent and rival powerbase in the White House led by former President Trump's son-in-law, Jared Kushner. President Joe Biden's selection of Ron Klain as COS sends an important signal that his White House will lean heavily on stability, competence, and experience.

The COS is the mediator between the chief executive or top official and that leader's team of foreign affairs advisors. To be effective, the COS should operate, as much as possible, in the background and in a low-key fashion to broker disagreements, manage access, and coordinate information. Put simply, the COS is a primary adviser and confidant who serves as a sounding board and deflector so the chief executive can function and make foreign policy decisions. Sound foreign policymaking also depends on the ability of the COS to organize an executive system staffed with competent and experienced personnel.

This article is organized into four sections. The first provides a general overview of the COS as both a foreign policy advisor to the chief executive and as manager of the foreign policymaking process. The second examines the dual roles played by White House Chiefs of Staff in advising and managing the foreign policy agendas of American presidents. The third digs deeper into



the U.S. foreign policy bureaucracy by describing the roles of COS's who serve U.S. Secretaries of State and Defense and the COS at the U.S. Agency for International Development. The fourth concludes that the foreign policy roles of the COS in government have lessons for the COS in the private sector.

Dual Roles: COS as Manager and Advisor

The search for an effective COS involves finding an experienced and skillful professional who can strike an appropriate balance between managing the foreign policy staff and advising the chief executive. As a manager, the COS coordinates the schedule and organizes the COS office, deputies, and staff to suit the needs of the executive's management style. The COS scrutinizes and hires experienced staff members, smooths the flow of information, and integrates advice. The COS knows how and when to involve the executive in foreign policymaking process, mediates competing interests, and serves as an honest broker in making foreign policy decisions.

As an advisor, the COS serves as a gatekeeper who ensures other top foreign policy advisors have access at the appropriate time, protects and advocates the executive's foreign policy agenda, negotiates with key legislative committees, ensures bureaucratic implementation of foreign policy decisions, and offers their knowledge on the security, diplomatic, and economic dimensions of foreign policy. However, the COS should be mindful of executive reputation and the trappings of office. To function effectively as both foreign policy advisor and manager, the COS must contend with political limitations and bureaucratic constraints on the chief executive's power.

Political Limitations

An effective COS knows that chief executives are also confronted with political limitations on their power in foreign policy and international affairs. Since time is of the essence, they need to act quickly and responsibly to keep the chief executive involved in foreign policy decision-making. Given that other top-level advisors may have competing interests, an effective COS will serve as an honest broker and mediator to manage the games foreign policy advisors play.

Other political forces exert limit the exercise of executive power and, by consequence, can limit the ability of the COS in their advisory roles. In a system of checks and balances, legislatures share foreign policymaking functions with chief executives, especially over defense and international affairs budgets. The COS must devote considerable time and effort to move the chief executive's preferred foreign policy initiatives through the legislature. In addition, democratic systems and societies have political parties, powerful interest groups, and social movements that the COS must work with to promote the chief executive's foreign policy agenda. The COS knows that the same paradox of power that inhibits executive action in domestic policy can also constrain the chief executive in foreign policy.



Bureaucratic Constraints

The COS also wrestles with large and deeply entrenched bureaucratic organizations in foreign policy. Agencies and departments have cultures, interests, and tasks that could be at odds with the foreign policy preferences and behavior of the executive. For example, in the U.S., the COS to the U.S. Secretary of State must be sensitive to and aware of the unique culture of the State Department, which values autonomy, freethinking, and creativity among its diplomatic personnel. According to David Wade, who was COS to Secretary of State John Kerry, “the State Department is like an iceberg. The view from the outside is deceiving. It is a huge managerial and organizational challenge different from any other.”¹

Since the COS is reliant on the foreign policy bureaucracy for information, they must ensure communications are clear and turf battles are mitigated. National security and international economic organizations determine not only the quantity of information available to the COS but also the quality and range of foreign policy options. Furthermore, bureaucrats have conflicting relationships with legislators and their staffs who fund international affairs programs. In the next section, this article examines in greater detail the ways in which White House COS’s served the president’s foreign policy interests and administered the foreign policymaking process.

The White House Chief of Staff and Foreign Policy

Like other chief executives around the world, U.S. presidents have unique worldviews and perspectives that shape their approach to foreign policy. These include background, personality traits, and managerial styles that determine how they govern foreign policy. In organizing staff and providing advice, the COS must take these into consideration. As this section will demonstrate, presidents since Richard Nixon have employed very different approaches to managing the White House with varying degrees of success.

Haldeman’s Rigidity and Regan’s Isolation

Some American presidents have preferred to organize the White House with formal and hierarchical patterns. This was the case with President Richard Nixon who often circumvented his Cabinet to concentrate power in the White House. COS HR Bob Haldeman created a staffing structure that allowed Nixon to work with National Security Advisor Henry Kissinger on ending the Vietnam War and opening diplomatic negotiations with China. Haldeman also served as a gatekeeper and referee between Kissinger who coordinated foreign policy and John Erlichman who was given responsibility for domestic policy.

Haldeman adapted to Nixon’s inflexible, aggressive, and power-seeking style. He viewed Nixon, who often isolated himself in a private study in the Old Executive Office Building, as needing “to be protected from himself.” Haldeman described Nixon as issuing “vindictive orders” designed to “try to defeat his opponents.”² Instead of deflecting them, Haldeman fed Nixon’s worst instincts. It is no surprise Haldeman was willing to execute Nixon’s Watergate cover-up and is the only COS to serve time in prison.

¹Toosi, Nahal. 2017. “Can Tillerson Calm the Chaos at State?” Politico. January 31: <https://www.politico.com/story/2017/01/can-rex-tillerson-bring-order-to-state-department-234448>



President Ronald Reagan's second COS, Donald Regan, also developed a very rigid White House advisory system. Such a system may have suited Regan's preference for a command-style approach, but it did not reflect the president's style, which was more flexible and open. Regan imposed a structure that shielded the president from countervailing information that would have protected him. With Reagan isolated, his administration became consumed by the Iran-Contra scandal, which almost took down his presidency. The Reagan White House became so paralyzed by Iran-Contra that the beleaguered president was forced to negotiate from a weakened position with Soviet leader Mikhail Gorbachev on the Intermediate Nuclear Forces treaty.

Carter's Carefree Approach and McLarty's Inexperience

At first, President Jimmy Carter decided not to have a COS, which meant there was no political enforcer working on his behalf. The White House staff was given leeway, often speaking on their own and without retribution. It often fell on Carter himself to mediate among his closest advisors. While this allowed Carter to prioritize his foreign policy initiatives, such as the Israel-Egypt peace negotiations and human rights, the absence of a structured foreign policy approach made it difficult to speak with one voice.

By the time Hamilton Jordan became Carter's COS, foreign policy advisors were clashing with one another. Without an effective gatekeeper, National Security Advisor Zbigniew Brzezinski and Secretary of State Cyrus Vance competed for influence and impeded the president's outreach to Congress to accomplish foreign policy goals. For example, Carter's negotiations with the U.S. Senate on Panamanian sovereignty over the Panama Canal, a process that began under Nixon, were politically haphazard and disorganized leading to Democratic losses in the 1978 midterm elections. Also, clashes over the U.S. response to the Hostage Crisis in Iran contributed to Carter's defeat in 1980.

President Bill Clinton's first COS, Thomas "Mack" McLarty, implemented an open system in which advisors from National Security Advisor Sandy Berger to political advisors like George Stephanopoulos had equal access to the president. Clinton ran his foreign policy operation the same way he ran his campaign, with an undisciplined and informal style. During the 1992 transition, while Clinton concentrated on his cabinet picks, he did not select McLarty until a month after he was elected.

However, Clinton's White House staff, including COS McLarty, had little Washington political experience, making outreach to Congress on foreign policy priorities difficult and challenging. The freewheeling approach allowed advisors to pursue their own agendas to the detriment of the president's foreign policy goals. Clinton was often ill-prepared to deal with major international challenges, such as in October 1993 when U.S. troops were killed in the humanitarian mission in Somalia, during the failed attempt to remove Raul Cedras in Haiti, and in April 1994 when his administration failed to respond to the genocide in Rwanda. While McLarty presided over the White House during the passage of the North American Free Trade Agreement, Clinton alienated the Democratic Party's working-class base. This along with the failure to pass health care reform contributed to Democratic losses in the 1994 elections.

² Joshua Zeitz, "The Last Time a General Propped Up a President." Politico, July 29: <https://www.politico.com/magazine/story/2017/07/29/the-last-time-a-general-propped-up-a-president-215438>



Gold Standards: James A. Baker III and Leon Panetta

Other COS combine relatively hierarchical structures with a president who has a more flexible management style to ensure multiple and competing information is reflected in the foreign policymaking process. In such a system, the COS maximizes their role as gatekeeper. President Ronald Reagan's first COS, James A. Baker III, developed a disciplined advisory system that emphasized multiple sources of information and ensured the president heard from different advisors.

Baker was aware of Reagan's optimism and agreeability. While Baker's COS system worked and Reagan's foreign policy priorities were advanced, namely his defense spending program and tax cuts, his role as gatekeeper was unbearable. Baker (quoted in Whipple 2018) described his role as someone who "walks around with a target on his back and on his front." Baker's staffing system was flexible and agile.

Baker was a very effective delegator. He would allocate key responsibilities to Deputy COS Michael Deaver and Counselor to the President Edwin Meese who had closer relationships with both the president and First Lady Nancy Reagan. Deaver devoted much of his time overseeing the First Lady's schedule, the military office, and the East Wing of the White House (Cohen and Walcott 2020). Baker set such a high standard in managing White House staff and advising the president that his predecessors in both Republican and Democratic administrations are measured by his flexible yet disciplined COS system.

Clinton's second COS, Leon Panetta, developed a more disciplined COS system that, while at odds with the president's open management style, helped mitigate its negative effects. Panetta, who was Director of the Office of Management and Budget and a former U.S. Representative, held daily staff meetings, developed organizational charts, and planned the president's schedule months in advance.

This allowed Panetta to oversee what everyone was doing in foreign policy, manage countervailing information from different advisors, and more effectively control access to the president. As a result, Clinton made some notable foreign policy accomplishments, such as negotiations for the withdrawal of Russian troops from Estonia and Latvia, developing the World Trade Organization (WTO), U.S. containment of the Mexican Peso Crisis, NATO intervention in Bosnia, and conclusion of the Dayton Peace Accords.

Serving Needs and Offsetting Vulnerabilities: Andrew Card as COS'

Andrew Card, who served for more than five years as President George W. Bush's first COS, coordinated the White House during some of the most consequential and controversial foreign policy challenges and decisions. Card informed Bush of the September 11th terrorist attacks, led White House counterterrorism policy, including passage of the PATRIOT Act, the invasions of Afghanistan and Iraq, the Iraqi insurgency, NATO expansion, the color revolutions in Ukraine and Georgia, and the rise of China. Card had considerable political experience, having served as White House deputy COS and Transportation Secretary under George HW Bush and as a state representative in the Massachusetts legislature. Card viewed his foreign policy role



as compensatory to the president and adapted every aspect of the White House staff to the president's personality and world view. Card stated, "the organizational chart should reflect the needs the president has rather than the bureaucracy that he's inherited" as well as to impose discipline on the White House in ways that enabled Bush to meet his foreign policy objectives.³

Card's role as COS was to offset structural and personal vulnerabilities in Bush's advisory system. However, he would often be frustrated with managing more high-profile political advisors like Karl Rove and Karen Hughes who routinely appeared on talk shows. This led many to think Card, Rove, and Hughes constituted a "Troika" of advisors, an arrangement Card strongly objected to because it undermined his managerial and advisory roles (Cohen and Walcott 2020).

Balancing Continuity with Change: Josh Bolten Steps In

Card's successor, Joshua Bolten, maintained relative continuity in the structure of Card's advisory process. Before serving as Bush's second COS, Bolten was Bush's OMB Director, deputy COS for Policy, and was an advisor on Bush's 2000 presidential campaign. As COS, Bolten was immediately confronted with the task of overseeing the president's "surge" strategy in Iraq. This meant his job would intersect with National Security Advisor Stephen Hadley. This was a delicate balancing act, in which Bolten ensured that the president was not cut off from the foreign policymaking process and offered his advice on how to interpret different national security information from Hadley and Secretary of Defense Donald Rumsfeld. Bolten also kept the White House in close communication with the Pentagon and General David Petraeus in Iraq.

Bolten had to manage significant changes to the Cabinet. One of his first duties was dealing with the so-called "revolt of the generals" who were protesting the Iraq war strategy. Bush, who was reluctant to make top-level staff changes, was urged to replace Rumsfeld and alter the Iraq War strategy. Bolten quickly pivoted to his advisory role by working with Secretary of State Condoleezza Rice and Hadley to bypass Vice-President Dick Cheney, a vociferous defender of Rumsfeld. Bush was also coming under increased public pressure to end a war he promised would be over soon after the invasion. Interestingly, after Democrats assumed control of Congress in 2006, Bush replaced Rumsfeld with Robert Gates. Bolten also downgraded Rove's role whose fame impeded the White House's ability to shift course.

Rahm Emanuel as Political Enforcer and Denis McDonagh as Skilled Operator

While President Barack Obama had four COS in eight years, Rahm Emanuel and Denis McDonough stand out. Rahm Emanuel was Obama's political enforcer, often deflecting negative attention away from the president. Emanuel's managerial process was to get early policy wins by following through on campaign promises, namely the massive fiscal response to the global financial crisis, the Great Recession, and the U.S. military withdrawal from Iraq. He played a very significant role in Obama's counterterrorism strategy by directing his staff to ensure close communications on the use of armed drone strikes.⁴

³ Quoted in Bradley Patterson, *To Serve the President: Continuity and Innovation in the White House Staff* Washington, D.C.: Brookings Institution, 2008: 40.



Denis McDonough is one of the few COS who had significant foreign policy experience. Previously, McDonough was COS to the National Security Council staff and served as deputy national security advisor. Prior to the Obama Administration, he was an Obama campaign foreign policy advisor and senior foreign policy advisor to former U.S. Senator Tom Daschle.

As COS, McDonough organized a staffing system that concentrated foreign policy in the West Wing and away from the cabinet departments, especially the more difficult to control departments of state and defense. While McDonough ensured that Obama was always consulted, it worsened relations with top officials in the cabinet. In August 2013, McDonough played a significant role when Obama considered launching airstrikes in Syria in response to Bashar al-Assad's use of chemical weapons. McDonough, who shared Obama's non-interventionist instincts and did not want his boss to repeat the mistakes of the NATO-led intervention in Libya in 2011, helped push Obama to avoid military intervention.

Four Chiefs in Four Years and Family Matters: Instability and Chaos in the Trump White House

President Trump's four COS in four years were forced to contend with a personality that was openly confrontational with both Democrats and Republicans, politically polarizing, and highly resistant to information or persuasion from outside his inner circle. Suspicious of experts, Trump staffed the White House with those he deemed personally loyal to him, namely his daughter Ivanka Trump and son-in-law Jared Kushner, and close personal confidants such as Steve Bannon, Hope Hicks, Stephen Miller, and Peter Navarro. COS Reince Priebus, John Kelly, Mick Mulvaney, and Mark Meadows were left to contend with a White House that enabled the president's impulses and inhibited his ability to influence foreign affairs.

Priebus and Kelly struggled to contend with White House clashes over the Mueller investigation on Russian interference in the 2016 presidential election. Priebus tried holding regular senior staff meetings and channeling information through himself. However, an orderly system never emerged. Priebus, who was Republican National Committee Chair, was beleaguered and struggled to manage the undisciplined Trump. Retired U.S. Marine Corps General and former Secretary of Homeland Security John Kelly imposed a much more disciplined structure on the White House staff with tighter organization that limited access to the president. However, like Priebus, Kelly struggled to manage Trump's freewheeling style and focused on preventing the volatile president from mismanaging foreign policy. Consequently, Republicans lost control of the House of Representatives in 2018.

Mick Mulvaney and Mark Meadows did not fare any better. Mulvaney, who held the title of Acting COS, opted against advising the president on foreign policy matters and simply permitted the unpredictable "Trump to be Trump." Mulvaney was sidelined by Kushner who allowed unfettered access to family members and those who enabled the president's worst instincts. Trump soon became embroiled in the House impeachment inquiry into his use of a shadow foreign policy network run by former New York Mayor Rudy Giuliani. Although he escaped removal from office by the Senate, that inquiry found Trump threatened to

⁴Jo Becker and Scott Shane, "Secret 'Kill List' Proves a Test of Obama's Principles and Will." New York Times, May 29, 2012: <https://www.nytimes.com/2012/05/29/world/obamas-leadership-in-war-on-al-qaeda.html>



withhold U.S. security assistance to Ukraine to pressure President Volodymyr Zelensky into investigating Joe Biden. During the COVID-19 pandemic, Mulvaney and the White House staff failed to coordinate with the coronavirus task force on building testing capacity and left state governors to compete for life-saving protective equipment and medical personnel on their own to contend with rising hospitalizations, infections, and deaths.

Mulvaney's successor, U.S. Representative Mark Meadows, also struggled to impose discipline on the White House. The more hands-on Meadows looked at his role as a balancing act between advising his boss and maintaining relations with Trump's family members. The problem for Meadows was that the Trump White House was already overwhelmed by the pandemic and the collapsing economy. According to Whipple, "One of the principal reasons we are in this mess is because Trump has never had a chief of staff who will tell him hard truths..."⁵ Trump's controversial presidency, the tainted 2016 election, multiple investigations and two impeachments, the bungled response to COVID-19, and the economic recession led to his defeat in 2020. Since managing the leader is just as important as managing the office, COS's cannot do their jobs effectively if they hampered and undermined by the chief executive.

Managing Multiple Crises: Ron Klain as Biden's COS

President Joe Biden's selection of Ron Klain was based on his preference for someone who has both long experience in Washington politics and enjoys a close working relationship with the new president. Klain was point person on the 2009 Recovery Act and helped lead the U.S. response to contain the Ebola outbreak in 2014. Klain will certainly have his hands full as he is tasked with overseeing the White House response to the COVID-19 pandemic and the establishment of a national vaccination plan as well as with shepherding a massive coronavirus relief package through Congress. Klain will also be responsible for coordinating U.S. reentry into the World Health Organization (WHO) and the Paris Climate Accords.

However, Biden will be challenged with repairing America's damaged alliances, especially NATO. He must also respond to Russia for interfering in U.S. elections and its devastating cyberattacks against U.S. government and private networks in 2020. He will also seek renewal of a New Start nuclear arms treaty with President Vladimir Putin and wrestle with China's rising global power. Biden's success in foreign policy will be depend on Klain's relationship with National Security Advisor Jake Sullivan and Secretary of State Antony Blinken and be determined by a disciplined staff that can engage with Congress and the foreign policy bureaucracy. The next section turns to the roles played by the COS in key bureaucratic departments and agencies.

The COS in the Foreign Policy Bureaucracy

This article highlights the foreign policy roles played by the COS. However, other some top-level officials in the foreign policy bureaucracy employ their own chiefs of staff to discharge responsibilities. In the U.S., these include senior administrative officials at the Cabinet and sub-Cabinet levels who advise the president and administer national security and foreign policy initiatives.



The COS to the Secretary of State and USAID

The most consequential and important COS position in the foreign policy bureaucracy is to the Secretary of State. The COS is senior advisor to the Secretary of State and manager of top and mid-level foreign affairs staff, including those in the U.S. Foreign Service as well as the principal deputy secretary and deputy secretary for foreign assistance programs. The COS also works with the counselor, the director of policy and planning, and undersecretaries of state, regional assistant secretaries of state, the chief economist, U.S. Ambassadors and Special Envoys, and directors of diplomatic initiatives and policy programs.

Since 2002, there have been six COS to Secretaries of State. COS Lawrence Wilkerson served Secretary of State Colin Powell and oversaw some of the most critical and controversial national security matters. These included the use of faulty CIA intelligence to aid Powell in his controversial 2003 United Nations Security Council presentation, maladroitness U.S. stabilization efforts in Iraq, and torture and abuse at Abu Ghraib prison. Brian Gunderson served as a low-key COS to Secretary of State Condoleezza Rice, focusing more on outreach to the State Department staff and Congress.

Cheryl Mills was both COS and Counselor to Secretary Hillary Clinton. Mills supervised food security and foreign assistance initiatives in Haiti after the 2010 earthquake and advised Clinton during the Arab Spring uprisings and the U.S. role in the 2011 NATO mission that toppled Muammar Gadhafi in Libya. She was also a liaison with the Clinton Foundation, which raised ethics questions and conflicts of interest with the State Department. Mills was even questioned by the FBI during the congressional investigation of whether attorney-client privilege could be applied to Clinton's private email server.

David Wade served as COS to Clinton's successor, Secretary John Kerry. Wade was low-key in his COS role, focusing on day-to-day operations and bringing calm and stability to a State Department that was involved in nuclear negotiations with Iran in the Joint Comprehensive Plan of Action, one of the Obama Administration's signature diplomatic achievements. The State Department was also confronted with challenges that tested American power, especially the U.S. response to Bashar al-Assad's use of chemical weapons in Syria, Russia's seizure of Crimea in 2014, and the rise of the Islamic State.

Jonathan Finer succeeded Wade as Kerry's COS and served as Director of Policy Planning simultaneously. Finer brought considerable foreign policy experience to the position as Vice-President Joe Biden's foreign policy speech writer, staff member for the National Security Advisor, and as foreign affairs correspondent with the Washington Post. Finer was a close adviser to Kerry and assisted him with multilateral negotiations in the Paris Climate Accords and the Trans-Pacific Partnership.

⁵Chris Whipple, "Why No One Wants to be Chief of Staff." Washington Post. December 12, 2020: https://www.washingtonpost.com/opinions/why-no-one-wants-to-be-chief-of-staff/2018/12/12/c13acbf2-fe48-11e8-ad40-cdfd0e0dd65a_story.html https://www.washingtonpost.com/opinions/why-no-one-wants-to-be-chief-of-staff/2018/12/12/c13acbf2-fe48-11e8-ad40-cdfd0e0dd65a_story.html



Secretary of State Rex Tillerson named Margaret Peterlin as COS. Previously, Peterlin served as communications officer in the U.S. Navy and on Republican House Majority Leader Dick Armey's staff, as national security advisor to House Speaker Dennis Hastert, and in the Department of Homeland Security. As Tillerson's COS, she functioned as a gatekeeper, limiting media access to the State Department and Tillerson himself. After Tillerson was fired in March 2018, Peterlin resigned and Secretary Mike Pompeo did not name a COS. Moreover, under both Tillerson and Pompeo, State Department morale plummeted in response to budget cuts to diplomatic staff and the foreign service and because of Trump's pressure campaign against U.S. diplomats in Ukraine. Key ambassadorships were also left unfilled in several allied nation-states, including South Korea, Germany, and Egypt.

The U.S. Agency for International Development (USAID) has its own COS who manages staff and advises the Administrator on foreign assistance programs. While USAID is an independent agency, the USAID Administrator works under the Secretary of State. This design ensures that the State Department focuses on diplomatic relations and USAID implements foreign assistance programs. During the Trump Administration, Dr. Bill Steiger was USAID COS who coordinated U.S. development assistance programs in the global effort to contain the COVID-19 pandemic. Other COS play pivotal roles in agencies that implement foreign assistance programs, including the Millennium Challenge Corporation and the Overseas Private Investment Corporation.

The COS to the Secretary of Defense

Like the Department of State, the Pentagon COS serves in somewhat similar capacities. As COS to Secretary of Defense Ashton Carter, Eric Rosenbach oversaw several defense initiatives, namely cyber defense, Russian aggression in Donbas and the annexation of Crimea, the Syrian Civil War, the military campaign against the Islamic State, and North Korean missile testing. Rosenbach also helped establish the Defense Innovation Unit and the Defense Digital Service. Previously, Rosenbach was an Army intelligence officer, deputy COS, and Assistant Secretary of Defense for Homeland Defense and Global Security where he was the primary architect of cyber defense policy.

Retired Rear Admiral Kevin Sweeney was named Secretary of Defense James Mattis's Pentagon COS. Sweeney devoted much of his time to working closely with Mattis and Special Envoy Brett McGurk in coordinating international combat operations in Syria and Iraq against the Islamic State. Sweeney announced his departure in January 2019 following Mattis's resignation in response to Trump's withdrawal of U.S. troops from Syria.

Combat veteran and former Army intelligence officer Eric Chewning was named by Secretary of Defense Mark Esper as Pentagon COS. Chewning focused primarily on reforming staffing operations in Esper's office. He contended with the legality of Trump's White House move to hold up security assistance to Ukraine, which prompted the president's House impeachment.

Jen Stewart, who replaced Chewning as COS in January 2020, brought considerable expertise to his office, especially on developing foreign policy strategy against China and Russia and in cybersecurity. However, devastating Russian cyberattacks against the U.S. took place while



Stewart was Pentagon COS. After Trump's loss in the 2020 presidential election and his firing of Esper, Stewart resigned and was replaced by NSC counterterrorism staff director Kashyap Patel who was Pentagon COS for Acting Secretary of Defense Christopher Miller during Trump's remaining days in office.

Conclusion

Since HR Bob Haldeman, the COS has played an increasingly greater role in foreign policy and international affairs. Given the vast foreign policy powers of the presidency, the president has fewer institutional constraints than in domestic policy. This means the foreign policy bureaucracy has significant autonomy to either carry out or resist the president's foreign policy agenda. Moreover, presidents often find themselves stymied in the domestic arena and turn to foreign affairs to secure big accomplishments they believe will pay them political dividends.

In many ways, COS's in the private sector should look at the experiences of COS's in government to learn how best to maximize opportunities, navigate hindrances, and avoid the pitfalls and pressures of leading large and complex organizations. A COS who manages and advises a corporate CEO is like a COS in government. A corporate COS ensures that the CEO can maximize time, manages information flow, adjusts operations to the leader's style, and implements executive decisions. The executive should select a COS who can lead day-to-day office operations, maintain morale among the staff and in the chief executive, and manage access and provide sound advice. This includes integrating staff who otherwise might be divided, linking the executive with the organization, and serving as an honest broker to overcome turf battles.

A COS can improve, worsen, or even enable the worst instincts and impulses of the chief executive in governing foreign policy. The COS and the chief executive must have a working relationship that can govern and lead foreign policy. The COS is a necessary and vital resource to a chief executive with the solemn responsibility to serve the nation and its interests.



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