



Selecting a Vice President: Advice for Presidential Candidates

A Report of BPC's Working Group
on Vice Presidential Selection

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BIPARTISAN POLICY CENTER

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Recommendations for Improving the Vice Presidential Selection Process

A Timeline for Vice Presidential Selection

RECOMMENDATION: Campaigns should allocate at minimum eight weeks' time for the core vetting and selection process.

RECOMMENDATION: In 2016, due to earlier scheduling of the national conventions, the window for selecting a running mate is considerably shorter than in past elections. As a result, the candidates may need to begin the selection process earlier than in recent years, and if they have not yet, should begin now.

RECOMMENDATION: Even if a party's presidential nominee has not been decided, the candidates still in contention should begin their core vetting process at least eight weeks before the convention.

Getting to Know the Vice Presidential Candidate

RECOMMENDATION: Presidential candidates should spend meaningful time personally getting to know each potential running mate on the short list of choices.

Structure of the Vetting Process

RECOMMENDATION: Campaigns should take care to control access to sensitive information gathered in the vetting process and avoid conflicts of interest.

Requirements for a Successful Vetting

RECOMMENDATION: Campaigns should utilize lawyers and other professionals with the proper skills and experience to conduct a thorough vetting of potential vice presidents. For social media in particular, this may require specialized skills.

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Introduction

In the upcoming months, the presidential nominees of each political party will make one of their most consequential decisions on the campaign trail: the selection of a running mate. Of three critical moments in the presidential campaign, the vice-presidential selection is chronologically the first, followed by the convention and the debates.

Of course, politics will play a role in the selection. The vice presidential nominee may provide some electoral benefit in a particular state or with an important constituency. More concretely, the presidential and vice presidential nominees will be a team on the campaign trail, spending time together and working together to convince the American people to vote for them. And the choice of a vice presidential nominee is an important piece of information for voters who may judge the presidential candidate favorably for a good choice and unfavorably for a bad one.

But this choice is also, in effect, the first “official” decision that the presumptive nominee and the eventual president-elect makes before assuming office. Over the past forty years, vice presidents have become close advisors and confidants to presidents; they now command a large staff at the White House and have important portfolios in foreign affairs, domestic policy, and congressional relations. Their day-to-day importance in an administration is not in doubt.

And yet, the most consequential duty of a vice president is one that everyone hopes is not exercised. It is the ultimate duty of the vice president to step in if, God forbid, the president dies, leaves office, or is otherwise unable to fulfill the functions of the office. Vice presidents must be of presidential timber, able to step into the nation’s highest office. They are political partners, White House advisors and confidants, and leaders of important administration initiatives, but in the end, a vice president must be someone with the character, stature, and ability to assume the presidency if needed.

The process by which a vice presidential selection is made is highly personal to the presidential candidate—and it is fair to say that it can be idiosyncratic. The presidential candidate determines the criteria for the choice of a running mate and puts in place all elements of the decision-making process.

Could this highly individual and informal process be improved through the adoption of more standardized best practices and expectations?

This question brought our group together late last year and spurred the creation of this report. We have been advisors to presidential campaigns: legal advisors, campaign managers, communications experts, and political party representatives. We have all seen the vice presidential selection process up close. And for the past six months, we have met as a group to discuss our experiences, share insights, and agree on recommendations. We have heard from others, including scholarly experts on the vice presidency and those who were on the short list of potential nominees.

We present here a set of recommendations and best practices for the nominees of both parties:

1. Timeline for Selection

The vice presidential selection process should be afforded adequate time and planning. At minimum, eight weeks should be allotted for the core vetting and selection portion of the process. Mistakes can be made or major problems exacerbated by an expedited and, therefore, inadequately deliberative process. We note that there may be instances in which the presidential nomination remains unsettled eight weeks prior to the convention. In those cases, the candidates still in the race should proceed with the selection and vetting process by this point. Regardless of when the next nominee is known, those in contention should begin the vetting at a minimum eight weeks prior to the convention.

2. Getting to Know the Candidates

The presidential nominee should know or get to know personally the potential vice presidential nominees before making the selection. Campaigns should also consider and account for this in their timetable. It is not enough to do a thorough vetting or to rely on the opinions of others. Presidential candidates who do not already know the small circle of final candidates for vice president will have to spend adequate time campaigning with them and getting to know them personally.

3. Structure of the Vetting Process

The vetting and final selection process is delicate. It will involve a small number of aides reviewing very sensitive information that is appropriately exposed to some but not others in the campaign hierarchy. Campaigns should plan to handle this material with care and only for as long as needed during the deliberative process. We make recommendations about the confidential structure of the process that will reflect these considerations.

4. Requirements for a Successful Vetting

The vetting process is entirely unofficial, and it is usually conducted with public record resources by teams of vetting lawyers. We make recommendations about the requirements for an effective vetting of a potential vice presidential nominee.

5. The Notification Process

The notification of selection should be made to the vice presidential nominee in advance of the public announcement, but with notice of only a day or two. Careful coordination of the notification should be made with both the candidate selected and those not chosen.

6. The Rollout

The rollout of the vice presidential announcement is primarily a political event, but it should be more. It is an opportunity for a presidential candidate to explain the criteria used to make the decision and the basis for the choice that he or she has made. More generally, it provides insight into a presidential candidate's decision-making process. At the same time, it is a chance for the vice presidential nominee to introduce himself or herself to the American public. We make recommendations about some elements of the rollout that may serve this larger purpose of educating voters, which is often undertaken in a very compressed timeframe before the convention and the formal beginning of the presidential general election campaign.

A Timeline for Vice Presidential Selection

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RECOMMENDATION: Even if a party's presidential nominee has not been decided, the candidates still in contention should begin their core vetting process at least eight weeks before the convention.

The process of identifying a long list of vice presidential candidates, conducting public records searches on the list, narrowing the list, interviewing candidates at the staff and the candidate level, vetting a small group of candidates, enabling vice presidential candidates to interact with the likely presidential nominee, and making and naming the final selection will take several months. The core of this process—vetting the short list of candidates, reviewing public records, conducting and reviewing interviews and questionnaires, and making a final selection—will require a minimum of eight weeks. This must, of course, be completed before the party convention. Campaigns are wise to begin even earlier by sending emissaries to speak with prominent figures who could be considered as vice presidential candidates and to gather opinions of party leaders and others outside of the campaign.

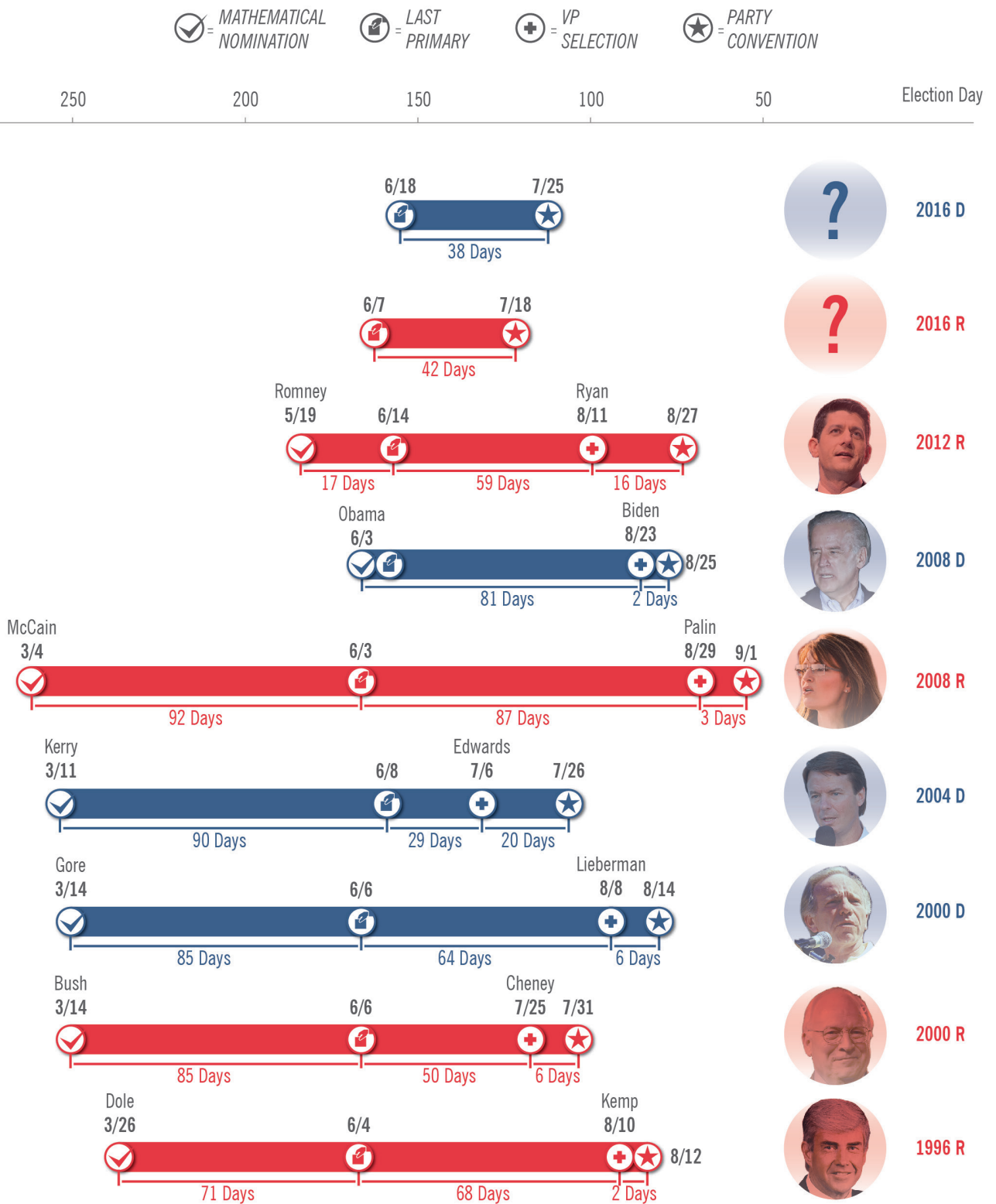
The infographic on page seven shows a timeline of major campaign events related to vice presidential selection for each election since 1996. The window for selecting a running mate is generally between when a candidate is mathematically considered the nominee based on delegates or the date of the last primary contest and the date of the party convention. Candidates have typically had ample time after mathematically

securing their party's nomination to conduct the selection process. Even in 2008 when then-candidate Barack Obama did not secure the nomination until early June and in 2012 when Gov. Mitt Romney had not secured the nomination until late May, the party conventions were scheduled late enough to give the nominees adequate time to make their decision. In 2016, however, the window is considerably shorter due to the party conventions being held earlier than in any cycle in more than twenty years.

With the 2016 Republican convention starting on July 18 in Cleveland, and the Democratic convention beginning the following week in Philadelphia, if the campaigns have not already begun their processes, now is the time to do so. The key consideration is timing, not whether the likely presidential nominee has emerged. If the race is still not decided, the candidates still in contention should launch their vetting processes so that they have the eight weeks minimum for an adequate vetting.

While in the past there have been instances of last-minute additions to the short list of vice presidential candidates and expedited vettings, we strongly recommend a more thorough process for which adequate time will be required for the best possible consideration of all of the options. In the case of the eleventh-hour vettings, candidates should recognize the risks of vetting under these pressures. Consequently, they should adopt as a rule of thumb that with the appropriate resources, a short list of prospective vice presidential nominees requires eight weeks for anything approaching a thorough vetting.

VICE PRESIDENTIAL SELECTION TIMELINE 1996-2016



*Last Primary represents the date of the last primary, caucus, or state convention

Getting to Know the Vice Presidential Candidate

RECOMMENDATION: Presidential candidates should spend meaningful time personally getting to know each potential running mate on the short list of choices.

While the vice presidential selection process includes many filters, including detailed background checks and advice from within and outside the campaign, the most important consideration is for the presidential nominee to know or get to know the vice presidential candidates personally.

Some presidential nominees—then-Senate Majority Leader Bob Dole (R-KS) for example—had long careers in Washington and deep connections to the party. Thus, Dole knew personally most of the short list of vice presidential candidates. But that is a unique advantage—many presidential candidates do not know all of the top candidates for vice president, or have had little occasion to spend time with them. This is a glaring problem in selecting someone who would work in close partnership at the highest level of government on the most sensitive issues.

Several successful strategies have been used by presidential nominees to get to know the short list of vice presidential candidates. First, at an early stage in the process, some candidates have sent emissaries to reach out to prominent party leaders who would likely make it to a short list of candidates. In some cases, especially when the presidential nominee was not a long time Washington figure, this emissary has personal knowledge of the vice presidential candidates. For example, the Bill Clinton campaign employed Warren Christopher at an early stage in 1992 to reach out to prominent Democrats who could later be considered as vice presidential nominees.

Second, once the presidential nominee has winnowed the list of potential vice presidential candidates, it is important to arrange interactions between the presidential nominee and the vice presidential candidates. The most effective way to ensure such interaction is to have the presidential nominee spend several campaign days with each vice presidential option.

For example, in 2012 the Mitt Romney campaign had several of the vice presidential candidates join Gov. Romney at campaign events in their states. And former aides note that these campaign stops were essential opportunities during which Romney could judge the candidates' qualities and assess the factor of personal chemistry that will determine the success of the relationship on the campaign trail or in the government.

Matt Rhoades, Romney's campaign manager, recounted his thoughts on the 2012 election at a campaign decision-makers conference hosted by the Institute of Politics at the Harvard Kennedy School of Government just after the election. Rhoades said that Romney and his vice presidential selection Rep. Paul Ryan of Wisconsin "hit it off, and there was an immediate chemistry. The advance guys would call me, and they would be like, 'Oh, he's our favorite surrogate, you guys. You've got to see these guys together.' It just worked. They both liked big ideas. They both liked talking about substantive issues. They both believed the country was in trouble and that they needed to do big things to fix it."

Structure of the Vetting Process

RECOMMENDATION: Campaigns should take care to control access to sensitive information gathered in the vetting process and avoid conflicts of interest.

There is no established model for the structure of the vice presidential vetting process. In particular, there is no general understanding about the presidential nominee's obligation of confidentiality to all of the candidates for the second spot or about the best practices for conducting a thorough and effective vetting.

By and large it has been common practice to enlist leading lawyers, typically with the capacity to draw on the resources of their law firms, to review public records and conduct interviews, primarily the interview of each of the prospective vice presidential nominees. The process is entirely private. Unlike the appointment of almost every high-level government official, it is in the hands of private parties who are responsible and accountable for its effectiveness and for managing it in a fashion that respects the privacy of those under review.

Of course, sensitive information is developed during the vetting. The question of who has access to that information is one that each candidate should also consider and resolve appropriately. There are two aspects of the question: who has access to the information as it is being assembled and when it is being reviewed, and what disposition is made of the material at the conclusion of the process?

An additional issue is the conflict of interest associated with certain compositions of the vetting team. Political consultants and other advisors in particular might have professional or personal relationships with both the candidate and a prospective vice presidential selection. It is a best practice to avoid the pressures that these competing commitments could introduce into the selection process. No one with established relationships with, much less current professional responsibilities to, a vice presidential prospect should be included in the deliberative process.

One form of a direct conflict of interest occurs when a presidential campaign advisor also has other clients who could be considered for the vice presidency. This issue has plagued campaigns of both parties. But campaigns and political staff should also be aware of future conflicts of interest that could arise when the campaign is over—political staff have had access to the most personal information about future clients or opponents. Therefore, it is in the interest of both the campaigns and political staff to place strict limits on political staff's access to the most sensitive, raw information obtained in the vetting process.

We recommend the vice presidential vetting process routinely incorporate the following elements:

A. All of the participants on the team actually performing the vetting should execute nondisclosure agreements prior to the commencement of their work. Those agreements would obligate them to observe confidential treatment of this material beyond the conclusion of the vetting process. There has been at least one recent example of a presidential campaign that had to contend with public reports about the findings of its vetting process. Campaigns have to guard zealously against this possibility to protect the privacy of those being vetted and to avoid actions that will discourage well-qualified vice presidential possibilities from engaging with the vetting process for fear of media leaks and associated breaches of privacy.

B. The presidential campaign should have a protocol that identifies those senior campaign officials who will review the results of the vetting and have full access to its contents. The presidential nominee will have to decide how to balance staff and consultant conflicts of interest and those individuals' future political ambitions. For example, some staff should be excused from vetting information so as to not leverage or spoil future client relationships. Moreover, the presidential candidate should be cautious about any consultants pushing their own current clients as vice presidential options.

The circle of those with access to the information (all of whom will have previously executed a nondisclosure agreement) should be limited to the vetting team leader and the candidate's designated liaison for coordinating the vetting, who is usually a co-chair or chair of the vetting process. In some presidential campaigns even the campaign manager has declined exposure to vetting, so that he or she is expecting only to be briefed about specific issues that surface in the review.

C. All of the potential vice presidential nominees participating in the vetting process should be asked to designate a representative, typically personal counsel, to be briefed at the outset about the vetting structure and to serve as the point of contact for all requests for information. The team should have contact only with the designated representative and with no other members of the vice presidential prospect's campaign organization or personal staff.

D. Portions of the vetting report not sourced from public information—drawn from the personal interviews and containing personal material including tax information—should be delivered from notes, orally only, and without any extensive written report of such private information. This material should be the basis for briefing those members of the senior staff who are responsible for hearing the conclusions and relating directly with the vetting team. At the same time, the vetting process will result in the compilation of material from public record sources that would prove useful in the campaign and should be maintained. But annotations of the public record material, reflecting conclusions of the vetting team about the significance (or truth) of particular events or facts, should also be avoided and commentary of this kind should be reserved for oral presentation.

E. The campaign should have agreed to procedures for the destruction of the personal (as distinguished from the public record) materials at the conclusion of the vetting process for which the vetting team chair or co-chairs are responsible.

Requirements for a Successful Vetting

RECOMMENDATION: Campaigns should utilize lawyers and other professionals with the proper skills and experience to conduct a thorough vetting of potential vice presidents. For social media in particular, this may require specialized skills.

Just as there is no established model for the structure of vetting, there is none for its successful conduct.

The vetting process is a fully private undertaking that depends on the use of publicly available information as well as information gathered through personal interviews. It is typically conducted by teams of vetters assigned to the various vice presidential prospects. The vetting teams are usually led by and made up of lawyers.

By and large the vetting encompasses the full scope of background information including financial disclosure, tax filings, and personal and family questions posed to potential nominees for cabinet-level positions by the White House, plus additional inquiries reflecting controversies that beset previous candidates for president, vice president, and other high office. The starting points are [Standard Form 86](#) (the public financial disclosure report that a nominee for vice president must file within 30 days of being nominated), and questionnaires and/or lists of questions that have been used by White House lawyers and personnel officers, with the end result being multiple pages of questions eliciting boxes of responsive information. Other options include the questionnaires developed by management consultants for senior corporate, university, or philanthropic leadership selection processes. The questions, whether written or oral, necessarily are both comprehensive and very intrusive; yet the vetters often worry that they are missing relevant information that will be discovered and deemed to be relevant by the press and/or the other party.

Not all lawyers are experienced in this kind of background research, nor in the requirements for conducting a successful

interview. A law degree or experience in law practice is not necessarily sufficient to assure a deftly handled, comparably conducted vetting. In other words, it is not enough to match a lawyer with a laptop and a Wi-Fi connection. Campaigns should rely on those professionals in whom they have confidence, in some instances individuals with experience in prior campaigns and vetting processes. It is important, however, that campaigns go beyond personal familiarity and mutual comfort to identify lawyers whose practices have given them some knowledge of the effective use of available resources to conduct sensitive research.

A fresh challenge for the vetting process is the material carried and preserved indefinitely on social media. Online activity is a case where the expertise required to vet this space might exceed the in-house capacities of the campaign. Specialized consultant services would serve the campaign's interest in both thoroughness and expedition. This aspect of the vet also poses special sensitivities as it may require attention to the posted comments, photos, and other presence on social media of the prospect's family members.

Campaigns may conduct some polling to supplement the other information developed through the vetting. Survey data, however, is of limited use. It might help to evaluate a specific argument (such as whether a particular selection would have an effect on competition within the vice presidential candidate's home state). For the most part, if measured by such appropriate criteria as personal compatibility with the nominee or capacity for effective performance in office, the strength of a particular choice will not be illuminated by polling data.

The Notification Process

RECOMMENDATION: Campaigns should notify the chosen vice presidential candidate and the individuals not chosen no more than a day or two in advance.

Notifying candidates of whether they have been selected or not typically takes place in the middle of fevered press speculation. Campaigns have an interest in keeping the selection private until their official announcement. The vice presidential candidates, however, also have an interest in the management of the process. A notably less than ideal situation occurred in 1988 when then-Senator Dan Quayle (R-IN) was notified just two hours before he was announced at the Republican convention as President George H.W. Bush's running mate. There have also been instances when a candidate has been required to go about his or her business, confronting numerous questions about how they view their prospects, when they have already been notified that they were not selected and have been asked to hold the information in confidence until the presidential nominee has announced his or her choice.

Campaigns should build a notification process that protects against this awkwardness—and would be more effective in guarding against leaks—by more closely coordinating notification of the candidates and the date of announcement. Notifications of those candidates not selected should ideally be made on the eve or morning of announcement: earlier notification of the successful candidate may be required to permit the staff to begin planning the rollout, but the time lapse between notification and announcement should not exceed a day or two.

The Rollout

RECOMMENDATION: The rollout of the vice presidential candidates should be an opportunity for the presidential candidates to display their decision-making process and introduce their running mate to the public.

The vice presidential selection, as one of the three critical points in the campaign process, requires a carefully designed rollout that answers the fundamental question: why did you pick that person? There are two necessary insights to share in answering that question: how the presidential candidate makes major decisions and why the chosen running mate is the best choice.

At the rollout, it is likely that the presumptive presidential nominee will speak, as will the vice presidential choice, with neither taking questions from the press. Then the two take to the road together for a series of rallies and events to showcase the ticket. Because it is early in the introduction of the vice presidential pick, and as opposition material is showered on the press corps, the presumptive ticket generally adopts a one-step-at-a-time approach to exposing the vice presidential choice to press interaction. This allows more time for that candidate to prepare for the more intensive encounters. The essential point is that the announcement of the vice presidential nominee occurs quickly without much notice to the nominee or to the bulk of the campaign staff. Even the most experienced vice presidential nominee will need several days of interacting with the campaign organization and the presidential nominee to get up to speed on all of the priorities of the nominee and of the campaign, before he or she is prepared to fully interact with the press.

In light of this approach, it will be important for the presidential nominee in the rollout to provide a comprehensive statement of the process and grounds for the choice, supplemented by a major background briefing of the press. The briefing should supply material details about the selection process and how it was structured, and it should add as much information as possible to the understanding of how the presumptive nominee evaluated the choices and made a final decision.

Conclusion

The selection of a vice presidential running mate requires significant time, care, and resources. Presidential candidates need opportunities to spend time with and personally get to know each possible vice presidential choice. The vetting process should be thorough and professionally conducted, but it also should be carried out in a discreet and confidential manner. The campaigns should undertake sufficient and considerate planning with regard to the announcement and rollout of the chosen running mate. Taken together, this is no easy task.

Selecting a vice president is one of the most important decisions a presidential candidate will make. The consequences of the selection could prospectively extend beyond the campaign and have a lasting impact on the country. It is necessary, therefore, that it be afforded the consideration due a decision of such magnitude.







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