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Record Group/Collection: George H.W. Bush Presidential Records
Collection/Office of Origin: Cabinet Affairs, White House Office of
Series: Porter, Richard, Files
Subseries:

OA/ID Number: 07137
Folder ID Number: 07137-001

Folder Title:
DPC Process [binder]

Stack:	Row:	Section:	Shelf:	Position:
G	15	16	2	

DPC MEETING PREPARATIONS

Establishing Details of the Meeting

1. DPC staff will determine when a DPC is to take place, the topic of the meeting, the agencies to be invited (call sheet is sample A), and whether the agenda is to be kept confidential.
2. Mary calls key Cabinet members to determine their availability for a meeting.
3. Mary calls Linda Schotz in the Attorney General's office at 514-1955 to see if he is available and to put the meeting on his schedule. The AG should have the 2:00 PM time slot on Tuesdays and Thursdays reserved for possible DPC meetings.
4. DPC staff calls Bill Myers to inform him of the meeting.

48 HOURS PRIOR TO MEETING

1. Mary calls Fran in Administration to arrange the Roosevelt or Cabinet room for the meeting.
2. Mary prepares OCA call sheet and has DPC contact assigned to the issue check call sheet against the working group membership list.
3. Mary gives Honor the call she listing Cabinet and all White House staff to be invited and have her contact all the appropriate agencies announcing the specifics.
4. Honor handles clearance of meeting participants for the West Wing.

Papers

1. The four elements to the paper being distributed and the order in which they go is as follows:
 - a) the distribution sheet;
 - b) the cover memo;
 - c) the agenda sheet; and
 - d) the paper or papers.

2. Mary prepares the distribution sheet (sample B), the cover memo (the details of the meeting), and the agenda page. The cover memo is signed by Richard.
3. Give package (cover sheet, memo and agenda) to Justine for review.
4. The paper from the drafting agency is attached behind the three other elements.
5. Fifty-five (55) copies of the package are made.

Distribution

1. Papers are to be distributed seventy-two (72) hours before a DPC meeting. Mary prepares the appropriate envelopes and each receives one paper except for Jim Cicconi who receives 10 for staffing with a note specifying who should receive a copy. Other copies of the paper are distributed as follows:
 - o 1 copy for Ede Holiday;
 - o 1 copy for central files;
 - o 1 copy for Richard Porter's Binder (but send along a few extra papers to meeting for those who might not have theirs with them);
 - o 1 copy for Honor Willson;
 - o 1 copy for Justine D'Andrea;
 - o 1 copy for Steve Danzansky;
 - o 1 copy for Dan Heimbach and/or John Schall; and
 - o the remainder for Mary Tsivgoulis' files.
- * Classified materials must be put in double envelopes before mailing.
2. Papers must be dropped off in room 54 before 9:15, 1:15 or 3:15 to make any of the mailruns. If this is not possible, phone calls will have to be made to each agency requesting they send a courier for pickup.

Richard's Binder

1. Richard's binder is prepared the day before the meeting and consists of the following five (5) components:
 - o a participants list (obtain from Honor);
 - o the Thornburgh memo;
 - o the paper (or papers);
 - o additional papers (any follow-up correspondence regarding the meeting); and
 - o notes (blank ruled paper for Richard's notes).

24 HOURS PRIOR TO MEETING

Thornburgh Memo

1. The Thornburgh memo is prepared the day before the meeting by the lead person on that particular DPC issue (i.e., education = John Schall). This is a confidential memo and is for nobody's consumption but the following: DPC staff, Bill Myers, and the Attorney General.
2. The completed memo is first FAXed to Bill Myers at 514-4699 then mailed by White House messenger to Room 5217 at the Main Justice Building.
3. One copy of the Thornburgh memo is given to Ede Holiday.
4. One copy is made for Richard's binder, one for Dan and/or John, and three or four for Mary's files for a total of seven or eight.

Before the DPC Meeting

1. Honor receives acceptance calls from Cabinet and White House staff regarding who will attend.
2. Obtain from Honor a final participants list for Richard's binder as well as copies for Steve Danzansky, John and/or Dan, and for Mary's files.
3. Prepare a Roosevelt Room seating chart when the attendance list is complete (Sample C).
4. FAX the final participants list and seating chart to Bill Myers for the Attorney General.
5. Mary prepares 50 copies of the agenda on letterhead to give to Honor.
6. Make sure Richard has his binder, all necessary papers, handouts, and necessary materials before leaving for meeting.

Miscellaneous

1. Add meeting to the DPC meetings list on Dean's ADMIN disk. As other meetings occur, please update this list.
2. Create main file in Dan's office -- include all pertinent paper work.
3. Do minutes and file. Minutes are not distributed outside of the office but kept merely as a record of the meeting.

Date: _____

PURPOSE: _____

DATE: _____ TIME: _____ LOCATION: _____

___ The Vice President	Cece Kramer	4245
___ STATE (Baker)	Linda Dewan	647-6108
___ TREASURY (Brady)	Meredith Oliver	566-5500
___ DEFENSE (Cheney)	Kathy Embody	695-5261
___ JUSTICE (Thornburgh)	Kathy Dickey	633-1955
___ INTERIOR (Lujan)	Charlene Yanes	343-7351
___ AGRICULTURE (Yeutter)	Sharon Marshall	447-3631
___ COMMERCE (Mosbacher)	Joe Casper	377-8582
___ LABOR (Dole)	Susan Thiegpén	523-7917
___ HUD (Kemp)	Sharon Zelaska	755-6417
___ HHS (Sullivan)	Teresa Clark	245-3410
___ TRANS. (Skinner)	Sandy Bushue	366-1111
___ ENERGY (Watkins)	Vicky Thornton	586-5534
___ EDUCATION (Cavazos)	Cindy Beezley	732-3043
___ VA (Derwinski)	Ann Bolton	233-3775
___ OMB (Darman)	Meg Brackney	4840
___ USTR (Hills)	Anne Kienlen	3204

WHITE HOUSE STAFF

___ CEA (Boskin)	Alice Williams	5042___
___ NSC (Scowcroft)	Florence Gantt	2255___
___ Governor Sununu	Jackie Kennedy	6797___
___ Andy Card	Linda Gambatesa	2533___
___ Roger Porter	Nancy Jones	2705___
___ Dave Demarest		7620___
___ Boyden Gray	Debbie Hansen	6611___
___ Jim Cicconi	Jane Farmer	2702___
___ Fred McClure	Lisa Jobe	2230___
___ Marlin Fitzwater	Natalie Wozniak	2100___
___ Steve Danzansky	Marcy Anderson	6630___
___ William Kristol	Ann Anderson	6614___
___ Dr. Bromley	Marian	7116___
___ Mike Deland	Susie Cohen	5080___

OTHERS

___ Director Bennett	Noreen Burns	673-2520___
___ Administrator Reilly	Pat Thorne	382-4700___
___ Director Webster	Peggy Dooley	482-1100___
___ Ambassador Pickering	Carol Solly	647-3972___

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**THE WHITE HOUSE OFFICE OF CABINET AFFAIRS
STAFFING MEMORANDUM**

Date: _____

Due by: _____

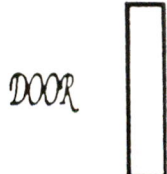
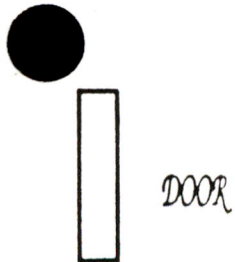
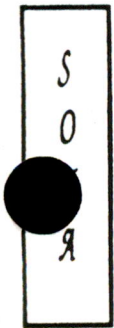
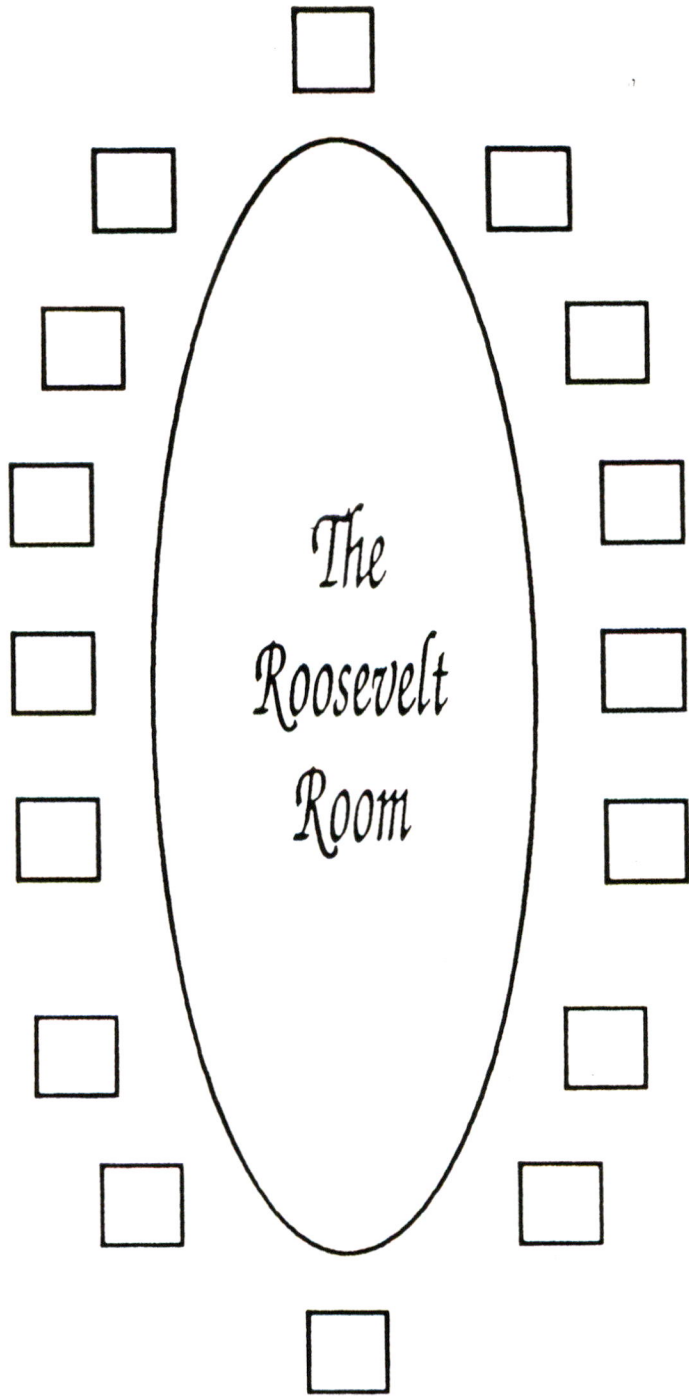
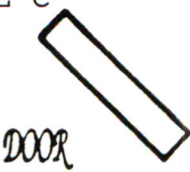
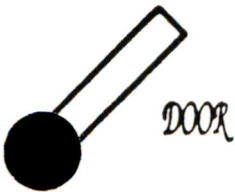
Subject: _____

From: _____

	Action	FYI		Action	FYI
ALL CABINET MEMBERS	<input type="checkbox"/>	<input type="checkbox"/>	CIA	<input type="checkbox"/>	<input type="checkbox"/>
Vice President	<input type="checkbox"/>	<input type="checkbox"/>	CEA	<input type="checkbox"/>	<input type="checkbox"/>
Agriculture	<input type="checkbox"/>	<input type="checkbox"/>	CEQ	<input type="checkbox"/>	<input type="checkbox"/>
Commerce	<input type="checkbox"/>	<input type="checkbox"/>	EPA	<input type="checkbox"/>	<input type="checkbox"/>
Defense	<input type="checkbox"/>	<input type="checkbox"/>	GSA	<input type="checkbox"/>	<input type="checkbox"/>
Education	<input type="checkbox"/>	<input type="checkbox"/>	NASA	<input type="checkbox"/>	<input type="checkbox"/>
Energy	<input type="checkbox"/>	<input type="checkbox"/>	National Science Foundation	<input type="checkbox"/>	<input type="checkbox"/>
HHS	<input type="checkbox"/>	<input type="checkbox"/>	ONDCP	<input type="checkbox"/>	<input type="checkbox"/>
HUD	<input type="checkbox"/>	<input type="checkbox"/>	OPM	<input type="checkbox"/>	<input type="checkbox"/>
Interior	<input type="checkbox"/>	<input type="checkbox"/>	OSTP	<input type="checkbox"/>	<input type="checkbox"/>
Justice	<input type="checkbox"/>	<input type="checkbox"/>	SBA	<input type="checkbox"/>	<input type="checkbox"/>
Labor	<input type="checkbox"/>	<input type="checkbox"/>	UN	<input type="checkbox"/>	<input type="checkbox"/>
OMB	<input type="checkbox"/>	<input type="checkbox"/>	Cicconi (<i>For WH Staffing</i>)	<input type="checkbox"/>	<input type="checkbox"/>
State	<input type="checkbox"/>	<input type="checkbox"/>	_____	<input type="checkbox"/>	<input type="checkbox"/>
Transportation	<input type="checkbox"/>	<input type="checkbox"/>	_____	<input type="checkbox"/>	<input type="checkbox"/>
Treasury	<input type="checkbox"/>	<input type="checkbox"/>	_____	<input type="checkbox"/>	<input type="checkbox"/>
USTR	<input type="checkbox"/>	<input type="checkbox"/>	_____	<input type="checkbox"/>	<input type="checkbox"/>
Veterans	<input type="checkbox"/>	<input type="checkbox"/>	_____	<input type="checkbox"/>	<input type="checkbox"/>

COMMENTS:

SAMPLE C



STAFFING AND QUALITY CONTROL FOR
PRESIDENTIAL DECISION MEMORANDA

CHECK OFF LIST

After DPC Clears Options Paper for Presidential Consideration:

- ___ Immediately draft Presidential decision memorandum using options paper. Proof. Spell check.
- ___ Review with other DPC staff as necessary.
- ___ Within 2 working days of final DPC meeting, clear decision memorandum (as needed) with working group chairman, with working group members representing key agencies and White House offices, and with the AG's representative. Incorporate changes.
- ___ Draft cover memorandum from DQB to the President. Proof. Spell check.
- ___ Review both the cover memorandum and decision memorandum with DQB (24 hours). Incorporate changes. Proof. Spell check.

Staffing Through the Office of the Staff Secretary:

- ___ Deliver penultimate draft of the decision memorandum (without DQB cover memorandum) to Jim Cicconi's to circulate for West Wing senior staff review and clearance.
- ___ Set a definite time, with Cicconi's office, for completion of clearance process, and designate to whom responses should be directed for incorporation in final draft.
- ___ Collect all comments from senior staff. Ensure copies of all comments, or record of verbal approvals, are sent to Cicconi.
- ___ Review/negotiate on any substantive changes.
- ___ Make final draft of decision memorandum to incorporate comments. Proof. Spell check.
- ___ Send final draft to AG for final review and signature.
- ___ Attach DQB cover memorandum.
- ___ Deliver final, signed, draft to Jim Cicconi for presentation to the President.
- ___ If nothing heard after 2 working days, call Cicconi's office to check on status.

TO:
FROM:
SUBJECT:

PROJECT OFFICERS
JOSEPH W. HAGIN II
CHECKLIST FOR PRESIDENTIAL EVENTS

General Responsibilities

- _____ The Presidential Advance Office has responsibility for all logistical arrangements for any event involving press coverage. Please coordinate with them from the time your event is approved in order to avoid the need for last-minute modification.
- _____ Notify and clear all participants. (Full name, social security number, date of birth and place of birth).
- _____ Prepare and submit briefing paper to Jim Cicconi's Office by 3:00pm of the preceding day (14 copies)
- _____ Coordinate with Tim McBride on Presidential involvement.
- _____ Coordinate with Press Office and Media Relations regarding Press Coverage. Provide Media Relations with hometowns of participants. No organization's photographers will be admitted to any event unless the press is present. Clearance of such photographers should be coordinated through Media Relations.
- _____ If remarks are required, coordinate with the Speechwriters Office well in advance.
- _____ For outdoor events at the White House, in case of inclement weather, clear and reserve the backup location indicated.
- _____ If participant plans to bring a gift, contact the White House Gift Unit, in advance, for review and proper procedure for handling.
- _____ If any foreign visitor or dignitary is to be involved, please coordinate with the NSC (x2224).
- _____ If any Department of Defense or Military personnel are to be involved, please coordinate in advance with the White House Military Office (x2150).
- _____ If press coverage is expected, please provide all pertinent information concerning this event (guests, scenario, backdrop, etc.) to the Presidential Advance Office at least 72 hours prior to the event.
- _____ Within five (5) days after the event, submit a complete, confirmed list of staff and attendees, identified by title, and the actual starting and completion times of the event, to the President's Diarist, Office of Presidential Appointments and Scheduling.
- _____ If tent name cards are needed, send a list of names to the Social Secretary's office (x7064) at least 48 hours in advance.
- _____ For West Wing Meetings all room arrangements (chairs, notepads, pencils, etc.) should be made through Carl Jones or Susie Peake.

Residence Events

- _____ Coordinate with the Social Secretary's office (x7064) for all arrangements.
- _____ Send guest list to Social Secretary's office, preferably three weeks prior to the event.
- _____ The President's attendance at this event should not be announced until official notification is given by the White House Press Office and any public announcement must be coordinated with that office. Also, prior to the distribution of any printed material, particularly details of the invitation, contact must be made with the White House Social Secretary, Laurie Firestone, at (x7064).

THE WHITE HOUSE

WASHINGTON

January 9, 1990

file 231
Hatch

MEMORANDUM FOR ALL WHITE HOUSE STAFF

FROM: C. BOYDEN GRAY *omb*
COUNSEL TO THE PRESIDENT

SUBJECT: Political Activity

This memorandum is to advise you of certain legal and policy limitations on your political activity as a member of the White House staff.

Generally, only those Executive Office of the President ("EOP") employees who are in the White House Office ("WHO") itself or the Office of the Vice President may engage in political activity. All others, except those appointed by the President by and with the advice and consent of the Senate, are subject to the provisions of the Hatch Act and may not engage in any partisan political activities. A discussion of the permissible and impermissible activities of "hatched" and non-"hatched" employees is set forth below.

It is important that you adhere strictly to these guidelines. Please check with your supervising officer and with Counsel's Office to ascertain whether you are paid from White House Office appropriations and are exempt from certain of the Hatch Act restraints; do not assume that because you have a White House pass you are not "hatched."

I. HATCHE ACT

All Hatch Act prohibitions, discussed below and found at 5 U.S.C. §§ 7321-7327, cover all EOP employees, with exceptions principally for employees:

- (a) paid from the appropriations for the WHO, or from the EOP appropriation item for Special Assistance to the President in Connection with Specially Assigned Functions or the Senate appropriation for the Office of the Vice President; or
- (b) appointed to their current positions by the President by and with the advice and consent of the Senate (provided that such officials have nationwide or foreign relations responsibilities, as all such officials within the EOP do); or
- (c) serving as head or assistant head of an executive or military department.

These exceptions have not been interpreted to extend to other EOP employees; such other employees including Office of Management and Budget (OMB) staff, Office of Policy Development (OPD) staff, and all Schedule Cs and detailees should abide by all by Hatch Act prohibitions. The restrictions of the Hatch Act are applicable to employees 24 hours a day, regardless of whether such employees are on annual or sick leave or leave without pay; as long as a covered individual is on the employment rolls of the Government, he or she is subject to the restrictions of the Hatch Act.

Employees fully covered by the Hatch Act may not:

- (1) take an active part in the management of a political campaign;
- (2) be a partisan candidate in an election for State or national office;
- (3) serve as an officer of a political party, a member of a national, State or local committee of a political party, or an officer or member of a committee of a partisan political club;
- (4) organize a political organization or club;
- (5) solicit, receive, handle, otherwise account for, or disburse political contributions;
- (6) sell tickets to, organize or actively participate in any political fundraising activity;
- (7) solicit votes for or against a candidate;
- (8) serve as a party or candidate challenger or pollwatcher;
- (9) drive voters to the polls for a candidate or party;
- (10) endorse or oppose a candidate in a political advertisement, broadcast or campaign literature;
- (11) serve as a delegate or alternate to a political convention;
- (12) organize or actively participate in the activities of a political convention;
- (13) serve on a standing committee of a political convention;
- (14) circulate a candidate-nominating petition;

- (15) address a convention, rally, caucus or similar gathering of a political party in support of or in opposition to a partisan candidate for public office.

Employees covered by the Hatch Act may:

- (1) register and vote;
- (2) make financial contributions to a party or candidate, except that 18 U.S.C. § 603 precludes Federal employees from contributing to their employer or "employing authority" (5 U.S.C. § 7323 imposes other restrictions on employees in Executive agencies);
- (3) express their opinion on political subjects;
- (4) wear campaign buttons or display bumper stickers;
- (5) be a member (but not an officer or committee member) of a political party or organization, so long as they do not actively engage in campaign activities;
- (6) attend (but not as a delegate) a political convention, fundraising function or other political gathering, so long as they do not organize or participate in the program of such an activity;
- (7) sign a nominating petition.

Because the limitations of the Hatch Act apply 24 hours a day, a "hatched" employee may not participate in political activity, either on the job or off. That means, for example, that a "hatched" employee may not draft a political speech. Although it is possible for a "hatched" employee to draft a speech concerning Administration issues that may be presented in a political setting, the "hatched" employee may not prepare any material containing statements of political advocacy, nor any materials that will be used exclusively for a political purpose.

Similarly, "hatched" employees may not type or transcribe political speeches; rather, the resources of a political organization should support political undertakings. Very limited ministerial activities, such as the typing of a brief political endorsement in a speech that otherwise deals with official matters or collating the brief political portion with the remainder of the speech are not objectionable under the Hatch Act. Additionally, "hatched" employees may write briefing materials on official Administration activities for use by Administration officials, even when such materials will be included in partisan political statements; however, such employees may not write or prepare any materials that will be used only for political purposes (e.g.,

materials for the platform of the Republican Party), nor may they prepare any materials that contain statements of political advocacy.

Administration officials should be particularly sensitive to the limitations on "hatched" employees in instances of mixed political and official travel. Where a "hatched" employee accompanies an exempted official on a trip, it remains essential that no inappropriate political activities be performed by the employee.¹ The "hatched" support staff of an exempted Administration official may perform their normal clerical and ministerial functions in connection with the political travel and appearances or activities of their principal, provided that the functions they perform are related to their official responsibilities. Such employees, however, may not perform tasks that are purely political in nature and which relate solely to their principal's political activities. Logistical arrangements for an exempted official's purely political travel or appearances should be made where possible by the appropriate political organization, but a "hatched" employee customarily involved in such ministerial activities may make limited scheduling arrangements for his or her principal's political travel or appearances. Under no circumstances may a "hatched" employee engage in any of the "management" activities of a political event or convention (e.g., plan or sell tickets to a political event or work on the activities of a committee, such as the Platform or Rules Committees, of a political convention).

Again, if you have any questions with respect to these matters, please call the White House Counsel's Office before you act. In addition, you should be aware that the White House Office of Political Affairs (OPA) serves as the official liaison to the political community, including party officials, candidates, and campaign officials and staff. White House staff members exempt from the Hatch Act who desire (as an entirely voluntary matter) to participate in political activities should coordinate their activities with OPA. For example, a White House official might be asked to speak at a political party function or to appear at a political fundraiser. Staff members should therefore not only ascertain the legality of such actions, but should also consult with OPA.

Even staff members who are exempted from the Hatch Act's prohibitions on partisan political activities are subject to certain restrictions. For example, the Hatch Act prohibits all Federal employees from using their official authority or influence

¹ Because the discharge of official duties is the only basis for a "hatched" employee to be accompanying his or her principal on a political trip, the travel expenses of such an employee must be paid from appropriated funds.

for the purpose of interfering with, or affecting, the results of an election. We have set forth below guidelines to help ensure that political activities undertaken by exempt personnel are within the limits prescribed by law and White House policy.

II. LIMITS ON POLITICAL ACTIVITIES OF EXEMPT PERSONNEL²

USE OF LEAVE

(1) Certain White House staff members are entitled to specific amounts of annual leave. As discussed below, such leave may be used for political purposes; however, one cannot take an "advance" on annual leave to engage in political activities. Those White House staff members not entitled to annual leave (e.g., commissioned officers) may use a ceiling of 15 days of compensatory leave (i.e., the equivalent of vacation time) for political purposes.

(2) Non-"hatched" White House staff members must perform their official duties for a minimum of 40 hours per week or 80 hours per two week pay period in order to receive their full Federal salary. If a staff member does not complete 40 hours of official duty in any week, the difference between the number of hours completed and 40 hours must be covered by annual leave, leave without pay, official holidays or made up in the second week of that pay period. The difference cannot be made up in a subsequent pay period.

(3) Those non-"hatched" White House staff members who complete a minimum of 40 hours of official duty during any full week (Monday-Sunday) may be absent from their official duty station for no more than one weekday (Monday-Friday) for the purpose of engaging in political activity without taking annual leave or leave without pay. If a staff member desires to be absent for political purposes for more than one weekday in any week, each additional weekday must be covered by annual leave or leave without pay, regardless of the number of official hours worked during that week. In other words, it is not permissible for a staff member to put in 40 hours of official duty in the first three days of the week and then take the remaining two weekdays off for campaigning without using annual leave or leave without pay.

² It is important to understand that for purposes of this section, the official responsibilities that customarily have been performed by the Office of Political Affairs constitute "official" and not "political" activities, and the restraints cited here therefore do not in general affect activities and office maintenance or other costs undertaken or incurred in the discharge of such responsibilities.

(4) Sick leave cannot be used to cover an absence from official duty for the purpose of engaging in political activity.

(5) Any White House staff member not subject to the Hatch Act is permitted to take leave without pay to cover absence from official duties for the purpose of engaging in political activity.

(6) When annual leave, compensatory leave or leave without pay is used for political purposes:

(a) Staff members must submit a request for leave, in advance of the leave period, to their White House unit supervisor. Following approval by the supervisor, the request should be forwarded to the White House Personnel Office.

(b) Supervisors must forward to the White House Personnel Office, in advance of a leave period, a report of their intended use of leave for political purposes.

(7) Staff members may only use eight hours of compensatory leave for political activity during any 7-day period without approval of the White House Personnel Office.

USE OF VEHICLES AND MESSENGERS

White House vehicles may not be used for political purposes. This means that White House cars may not be used to transport staff members or materials to or from any political committee office or event. Nor may White House vehicles be used to transport staff members or political materials to airports or any other location if the purpose of the trip is primarily political.

Because of the special requirements surrounding departures and arrivals from Andrews Air Force Base, White House vehicles may be used to transport White House staff members to that facility when they are accompanying the President, Vice President or First Lady on a political trip. Additionally, where the President is participating in a political event in the Washington, D.C. area or other location where White House cars are available for official purposes, White House cars may be used for the Presidential motorcade to the extent essential to the security and support of the President.

White House messengers should not be used to deliver or pick up materials from the RNC or any other political committee.

USE OF COMMUNICATIONS SYSTEMS AND COPYING MACHINES

(1) In those limited circumstances in which government communication systems (telephone, telegraph, teletype, telecopy or radio) are used for campaign-related purposes, appropriate reimbursement or payment at the "usual and normal charge,"

affecting, the nomination or the election of any candidate." While there is no definitive statement by a court or other body of what activities constitute such improper interference with election results, the following types of activities are clearly prohibited:

-- One Federal employee directly or indirectly soliciting money from another Federal employee for a campaign contribution, or making a contribution to the official responsible for his or her employment.

-- Soliciting or receiving campaign contributions on Federal property or in Federal buildings. This means that fundraising events may not be held in the White House; that no fundraising phone calls or mail may emanate from the White House or any other Federal buildings; and that no campaign contributions may be received at the White House or any other Federal building.

-- Soliciting or accepting a campaign contribution or campaign support in exchange for a promise to appoint someone to a Federal job.

-- Promising or withholding Federal benefits (jobs, grants, contracts, etc.) based on political support or nonsupport.

-- Favoring or penalizing employees or withholding employment in order to induce someone to make a political contribution or otherwise participate in political activity.

Violations of these statutes can of course have serious consequences and I urge you, if you have any questions about the legality or propriety of a proposed action, to consult the White House Counsel's Office.

15 C.F.R. § 100.7(a)(1)(B), must be made by a proper political campaign committee.

(2) Because of the need for liaison between limited numbers of White House staff members and a political committee, telephones may be used for local calls. However, White House telephones must not be used, even locally, for regular committee activities such as recruiting volunteers or fundraising.

(3) Government credit cards must not be used for campaign-related or other political calls, whether made from within or without the White House.

(4) Government operators should not be used to place campaign-related or other political long distance calls.

(5) Campaign-related or political long distance telephone calls made from the White House may be made only if charged to a credit card issued by the proper campaign or political committee or on telephones installed and maintained by such committee for exclusive use in dealing with campaign or political matters.

(6) The incoming WATS System (800 #) should not be used to call into the White House on campaign or political matters.

(7) White House Communications Agency (WHCA) facilities provided outside the White House in connection with travel may continue to be used during mixed and wholly political trips. These facilities must be used exclusively for communications relating to trip planning and arrangements and not for direct political purposes such as campaign fundraising and crowd-building. The Government will be reimbursed for the use of these facilities.

(8) Except in limited instances approved by the White House Counsel's Office, Government copying machines may not be used to reproduce materials for transmittal to a campaign or political committee.

TRAVEL

Government funds must not be used for the political travel of staff members. Principles governing the allocation of travel expenses are set forth elsewhere.

Any political or "mixed" official and political travel by White House staff must be approved in advance by the Special Assistant to the President and Director of White House Operations and by the Office of Political Affairs. No reimbursements will be made for non-approved travel expenses.

MEETINGS IN GOVERNMENT BUILDINGS

(1) Government buildings, including White House offices and meeting rooms, should not be used for meetings or events organized by a campaign or political committee. Informal meetings involving small numbers of campaign or political officials and White House staff members may occasionally be held in a White House staff member's office or, if it is a luncheon or breakfast meeting, in the White House Mess, provided that such meetings do not interfere with the conduct of Government business.

(2) Campaign fundraising activities of any kind are prohibited in or from Government buildings.

(3) Campaign-sponsored or other political activities (receptions, dinners, meetings, but not fundraisers) may be held in the Executive Residence at the White House, provided that either the President, Mrs. Bush, or some other family member attends the event. Campaign or other political events (other than fundraisers) may also be held at the Vice President's Residence so long as the Vice President, Mrs. Quayle, or some other family member attends the event. The cost of campaign or political events at either residence must be paid by the proper campaign or political committee in accordance with the guidelines which have been established for the use of these residences for nonofficial purposes.

USE OF PHOTOGRAPHS

(1) White House photographers may continue to photograph all Presidential, First Lady, and Vice Presidential activities for the purpose of creating an archival record of this Administration. However, as a general rule, photographs taken by White House photographers at political events may not be used for distribution to individuals attending such events or for any other political or campaign purpose.

(2) Photographs taken at events in the Executive Residence (other than political-sponsored events), at West Wing and East Wing meetings, and at non-political events outside the White House may be distributed as in the past.

(3) A campaign or political committee will be expected to provide a photographer at all campaign and political events for which it desires to distribute photographs to the participants. White House photographers will not photograph receiving lines or greetings at campaign or political events, except to the extent necessary for archival purposes.

(4) A campaign or political committee may purchase for its use photographs taken by White House photographers in those limited circumstances where those photographs provide the only source for

CHECK-OFF FOR DPC MEETING PREPARATION

- 2 days before
- o Shorten issue papers
 - o Last cut from WG members
 - o Prepare draft agenda
 - o Prepare final issue papers
 - o Determine participants:
 - * DPC members
 - * Additional attendees
 - * Presenters
 - o Send list of additional attendees/presenters to David Bates for approval
 - o Receive approved list of participants
 - o Prepare DPC meeting paperwork
 - * Exec. Sec.'s cover memo
 - * Agenda
 - * Issue papers
 - o Xerox sets of meeting paperwork (58 sets)
 - o Take 50 sets to OCA, along with list of additional invitees/presenters
 - o Find out if presenters will need A-V equipment or easels
- 1 day before
- o Request A-V equipment/easels
 - o Make up Exec. Sec.'s book (see book list)
- Day of
- o Get final list of attendees from OCA, and put in Exec. Sec.'s book
 - o If presenters need to set up, go over to Roosevelt Room 15 minutes early

CHECKLIST FOR DPC MEETING PREPARATION

Three Days Before:

- o Send memo from Ken Yale to the Attorney General
re: upcoming DPC meeting

Two Days Before:

- o Shorten issues papers
- o Last cut from Working Group members
- o Prepare draft agenda
- o Prepare final issue papers
- o Determine participants:
 - DPC members
 - Additional attendees
 - Presenters
- o Send list of additional attendees/presenters to David Bates for approval
- o Receive approved list of participants and presenters
- o Prepare DPC meeting paperwork
 - Ken Yale cover memo
 - Agenda
 - Issue papers
- o Xerox sets of meeting paperwork (58 sets)
- o Give 58 sets to Mary Tsivgoulis who distributes as follows:
 - 4 sets to OCA (Honor) for OCA file
 - 10 sets to Jim Cicconi for White House distribution
 - 44 sets which Mary distributes to DPC and other meeting participants. Remainder for Mary's files
- o Find out if presenters will need A-V equipment or easels

One Day Before:

- o Request A-V equipment/easels
- o Make up Ken Yale's book
 - Original agenda
 - List of final attendees from OCA
 - Additional invitees/presenters' list
 - Copy of Ken Yale's cover memo
 - Divider page
 - Issue paper (1st agenda item)
 - Divider page
 - Issue paper (2d agenda item)
 - DPC membership list
 - Blank notebook pages
 - File folder with 5 extra background papers

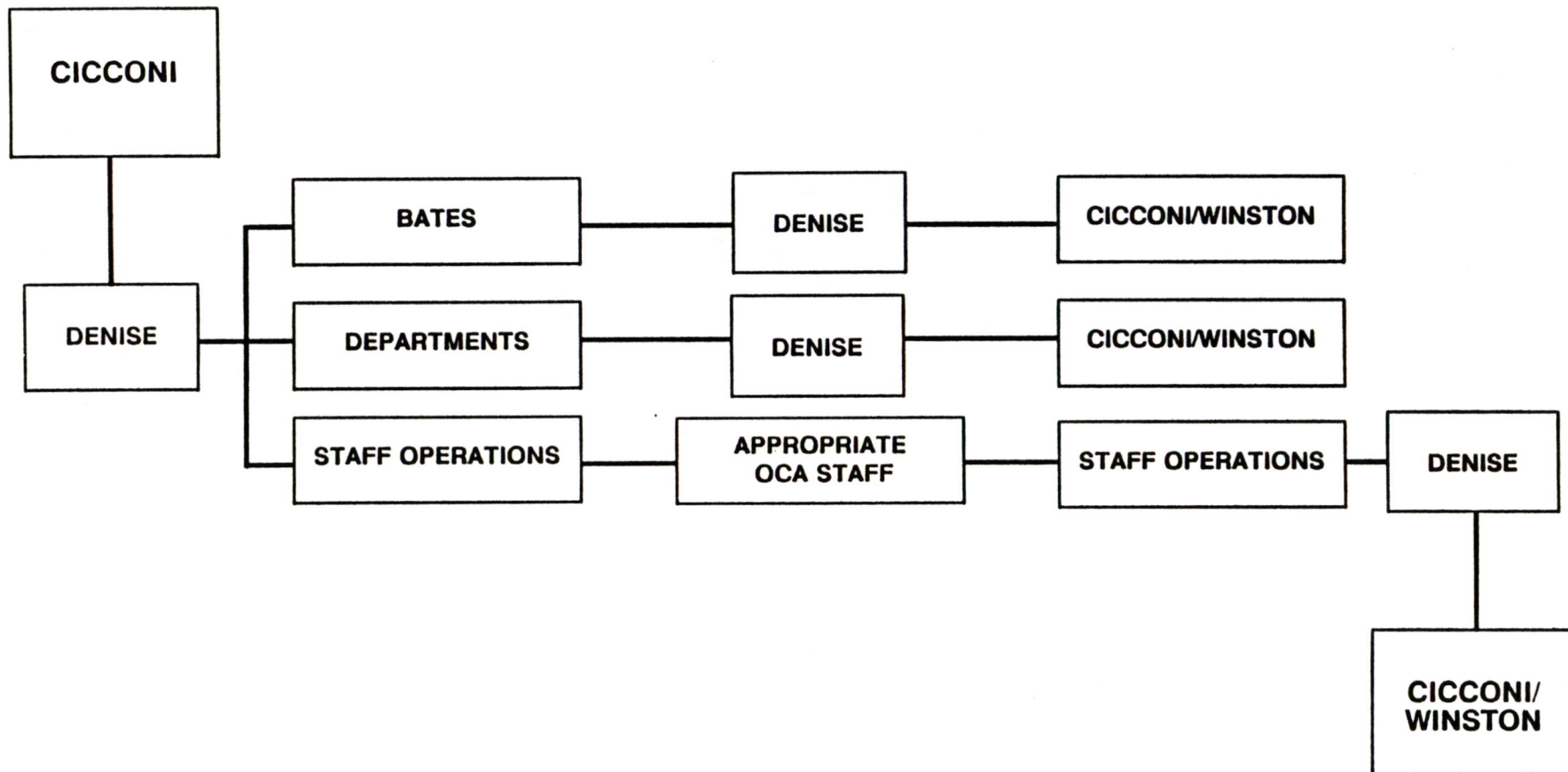
Day Of:

- o Get final list of attendees from OCA, and put in Ken's book
- o If presenters need to set up, go over to Roosevelt Room 15 minutes early

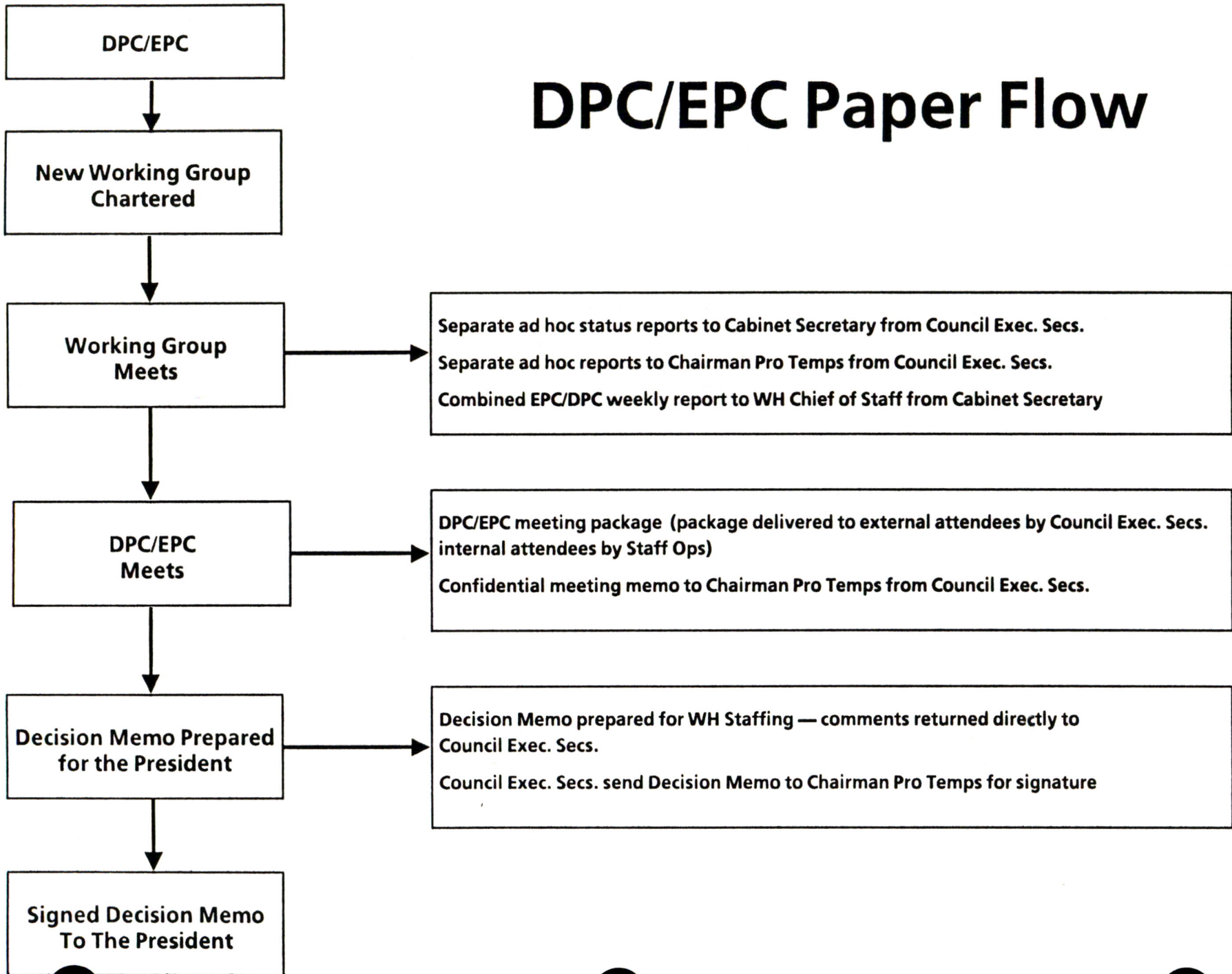
Day After:

- o Obtain from Honor the actual list of participants for DPC meeting
- o Prepare Minutes (John or Dan). File copies with Mary: (1) DPC meeting folder and (2) DPC meeting minutes notebook

Presidential Speeches Flow Chart



DPC/EPC Paper Flow



Sample # 1

Document No. _____ CA

THE WHITE HOUSE OFFICE OF CABINET AFFAIRS STAFFING MEMORANDUM

Date: _____

Due by: _____

Subject: _____

From: _____

	Action	FYI		Action	FYI
ALL CABINET MEMBERS	<input type="checkbox"/>	<input type="checkbox"/>	CIA	<input type="checkbox"/>	<input type="checkbox"/>
Vice President	<input type="checkbox"/>	<input type="checkbox"/>	CEA	<input type="checkbox"/>	<input type="checkbox"/>
Agriculture	<input type="checkbox"/>	<input type="checkbox"/>	CEQ	<input type="checkbox"/>	<input type="checkbox"/>
Commerce	<input type="checkbox"/>	<input type="checkbox"/>	EPA	<input type="checkbox"/>	<input type="checkbox"/>
Defense	<input type="checkbox"/>	<input type="checkbox"/>	GSA	<input type="checkbox"/>	<input type="checkbox"/>
Education	<input type="checkbox"/>	<input type="checkbox"/>	NASA	<input type="checkbox"/>	<input type="checkbox"/>
Energy	<input type="checkbox"/>	<input type="checkbox"/>	National Science Foundation	<input type="checkbox"/>	<input type="checkbox"/>
HHS	<input type="checkbox"/>	<input type="checkbox"/>	ONDCP	<input type="checkbox"/>	<input type="checkbox"/>
HUD	<input type="checkbox"/>	<input type="checkbox"/>	OPM	<input type="checkbox"/>	<input type="checkbox"/>
Interior	<input type="checkbox"/>	<input type="checkbox"/>	OSTP	<input type="checkbox"/>	<input type="checkbox"/>
Justice	<input type="checkbox"/>	<input type="checkbox"/>	SBA	<input type="checkbox"/>	<input type="checkbox"/>
Labor	<input type="checkbox"/>	<input type="checkbox"/>	UN	<input type="checkbox"/>	<input type="checkbox"/>
OMB	<input type="checkbox"/>	<input type="checkbox"/>	Cicconi (<i>For WH Staffing</i>)	<input type="checkbox"/>	<input type="checkbox"/>
State	<input type="checkbox"/>	<input type="checkbox"/>	_____	<input type="checkbox"/>	<input type="checkbox"/>
Transportation	<input type="checkbox"/>	<input type="checkbox"/>	_____	<input type="checkbox"/>	<input type="checkbox"/>
Treasury	<input type="checkbox"/>	<input type="checkbox"/>	_____	<input type="checkbox"/>	<input type="checkbox"/>
USTR	<input type="checkbox"/>	<input type="checkbox"/>	_____	<input type="checkbox"/>	<input type="checkbox"/>
Veterans	<input type="checkbox"/>	<input type="checkbox"/>	_____	<input type="checkbox"/>	<input type="checkbox"/>

COMMENTS:

Sample # 2

Document No. _____ CA

OFFICE OF CABINET AFFAIRS STAFFING MEMORANDUM

Date: _____

Due by: _____

Subject: _____

From: _____

	ACTION	CONCUR	FYI		ACTION	CONCUR	FYI
BATES	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	JACKSON	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
DANZANSKY	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	MCBEE	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ADAIR	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	SCHALL	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
BUCHHOLZ	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	WETHINGTON	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
D'ANDREA	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	WILLIAMSON	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
DEWITT	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	YALE	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
DUGGAN	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
EVANS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
FARRAR	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
HEIMBACH	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Comments:

THE WHITE HOUSE

WASHINGTON

THE CABINET
Departments and Agencies
Protocol Order

Vice President
State
Treasury
Defense
Justice
Interior
Agriculture
Commerce
Labor
HHS
HUD
Transportation
Energy
Education
Veterans
OMB
USTR

.....

NSF
SBA
OPM
NASA
GSA
NASA
CEQ
CIA
OSTP
CEA
EPA
UN
ONDCP

STAFFING AND QUALITY CONTROL FOR
PRESIDENTIAL DECISION MEMORANDA

CHECK OFF LIST

After DPC Clears Options Paper for Presidential Consideration:

- ___ Immediately draft Presidential decision memorandum using options paper. Proof. Spell check.
- ___ Review with other DPC staff as necessary.
- ___ Within 2 working days of final DPC meeting, clear decision memorandum (as needed) with working group chairman, with working group members representing key agencies and White House offices, and with the AG's representative. Incorporate changes.
- ___ Draft cover memorandum from DQB to the President. Proof. Spell check.
- ___ Review both the cover memorandum and decision memorandum with DQB (24 hours). Incorporate changes. Proof. Spell check.

Staffing Through the Office of the Staff Secretary:

- ___ Deliver penultimate draft of the decision memorandum (without DQB cover memorandum) to Jim Cicconi's to circulate for West Wing senior staff review and clearance.
- ___ Set a definite time, with Cicconi's office, for completion of clearance process, and designate to whom responses should be directed for incorporation in final draft.
- ___ Collect all comments from senior staff. Ensure copies of all comments, or record of verbal approvals, are sent to Cicconi.
- ___ Review/negotiate on any substantive changes.
- ___ Make final draft of decision memorandum to incorporate comments. Proof. Spell check.
- ___ Send final draft to AG for final review and signature.
- ___ Attach DQB cover memorandum.
- ___ Deliver final, signed, draft to Jim Cicconi for presentation to the President.
- ___ If nothing heard after 2 working days, call Cicconi's office to check on status.

THE WHITE HOUSE
WASHINGTON

February 27, 1990

MEMORANDUM TO OCA STAFF

FROM: DAVID BATES 

SUBJECT: OCA PAPER COORDINATION SYSTEM

A new OCA paper flow system has been developed over the past few weeks through consultation with Steve Danzansky, Holly Williamson and the rest of the OCA staff. Modifications may, of course, be necessary as we put the theories into practice over the next few weeks, but I am sure this system will prove helpful to us all.

Thanks for all your cooperation.

THE WHITE HOUSE
WASHINGTON
February 27, 1990

MEMORANDUM TO DAVID BATES

FROM: HOLLY WILLIAMSON

SUBJECT: OCA PAPER COORDINATION SYSTEM

I. OBJECTIVE:

To implement a system that provides coordination and tracking of information for the Office of Cabinet Affairs (including EPC, DPC, Liaison and Ag. Trade); that establishes concurrences and improves information sharing among OCA staff; that provides early warning signals on cross cutting issues; that provides Cabinet Departments, Agencies, Councils and other White House staff with consistent, standard and accurate information; and that provides all such information in a timely manner.

II. INFORMATION IDENTIFICATION:

The following list highlights routine categories of information either generated by or regularly used by OCA staff. Staff operations (staff ops) will be responsible for the coordination of distribution of this information.

A. Information staff ops will route to OCA staff:

OCA staff will receive individual copies of some of the information listed below and office pool copies of others.

1. The Press Secretary's daily briefings.
2. OMB daily legislative highlights.
3. President's daily public schedule.
4. Weekly legislative summary report.
5. Weekly Department legislative reports.
6. OMB Friday economic report.
7. Approved Presidential activities -- "pink sheets."
8. Presidential speeches for OCA staffing (see flow chart).
9. Other White House staffings for OCA.

B. Information staff ops will route to OCA staff and/or West Wing:

1. Schedule proposals/briefing papers (from Bates; cc Danzansky).

2. EPC/DPC documents (see flow chart).
3. Memos for the President (from Bates; approval Danzansky).
4. Memos for Bates and/or Danzansky.
5. OCA papers for White House staffing.
6. OCA papers for the NSC.
7. Weekly summary of OCA meetings.
8. The Cabinet Report.
9. An index of Departmental reports received by the Clerk's office.

Presidential correspondence will continue to be coordinated by Denise/Marnie.

III. SYSTEMATIC METHODS:

A. Standard daily deliveries

Staff ops will conduct 4 standard daily deliveries of materials (8:45 am, 11:00 am, 2:30 pm and 5:00 pm) to and from the West Wing, in addition to urgent runs on an "as needed" basis.

B. Standard staffing and routing sheets

To facilitate the flow of information, I have generated the following forms for the OCA staff:

- External OCA staffing sheet (see attached sample #1).
- Internal OCA staffing sheet (see attached sample #2).
- Buck slip to Holly from OCA staff (each person will have their own pad).

IV. STANDARD PROCEDURES:

1. When OCA staff has a paper ready to go through the staff ops system (regardless if they are the originator or the assigned action person), 2 xeroxed copies should be attached to the original paper, in addition to the buck slip they have completed.

2. When OCA staff is sending something through the staff ops system, please distribute any FYI and/or concurrent copies to the appropriate parties (except to David Bates or Steve Danzansky; they will receive copies from staff ops). OCA staff should also check off the recipient names on the buck slip. (If on occasion OCA staff is not able to distribute these, merely include in the comment section: "FYI's not distributed," and staff ops will distribute for you.)

3. When staff ops assigns the action on a paper, distribution of FYI and/or concurring copies will occur simultaneously.
4. The internal OCA staffing sheet should stay with the original assignment during all stages of the routing process.
5. When a document is of an urgent nature, affix a red dot on the buck slip you have completed, in addition to checking off the "urgent" box.
6. Deliver the complete package of information to Room 230 and place in the appropriately marked in-box: To Bates, To Danzansky, To Other.
7. A stamp will be available in my office for identifying close hold or sensitive documents.
8. If I am not in and something needs to be discussed with me or needs immediate attention, please talk to Marcy Anderson in Room 231.
9. Once I retrieve the information from my in-box, the document will begin its routing process with the assignment of a tracking number and confirmation of appropriate concurrences and FYI's. The urgency of the package will determine its need to be moved immediately or on the next standard delivery. When computerized tracking is necessary, the document will not be logged into the system until after it has been routed to its appropriate destination. This ensures the system moves quickly yet still efficiently.

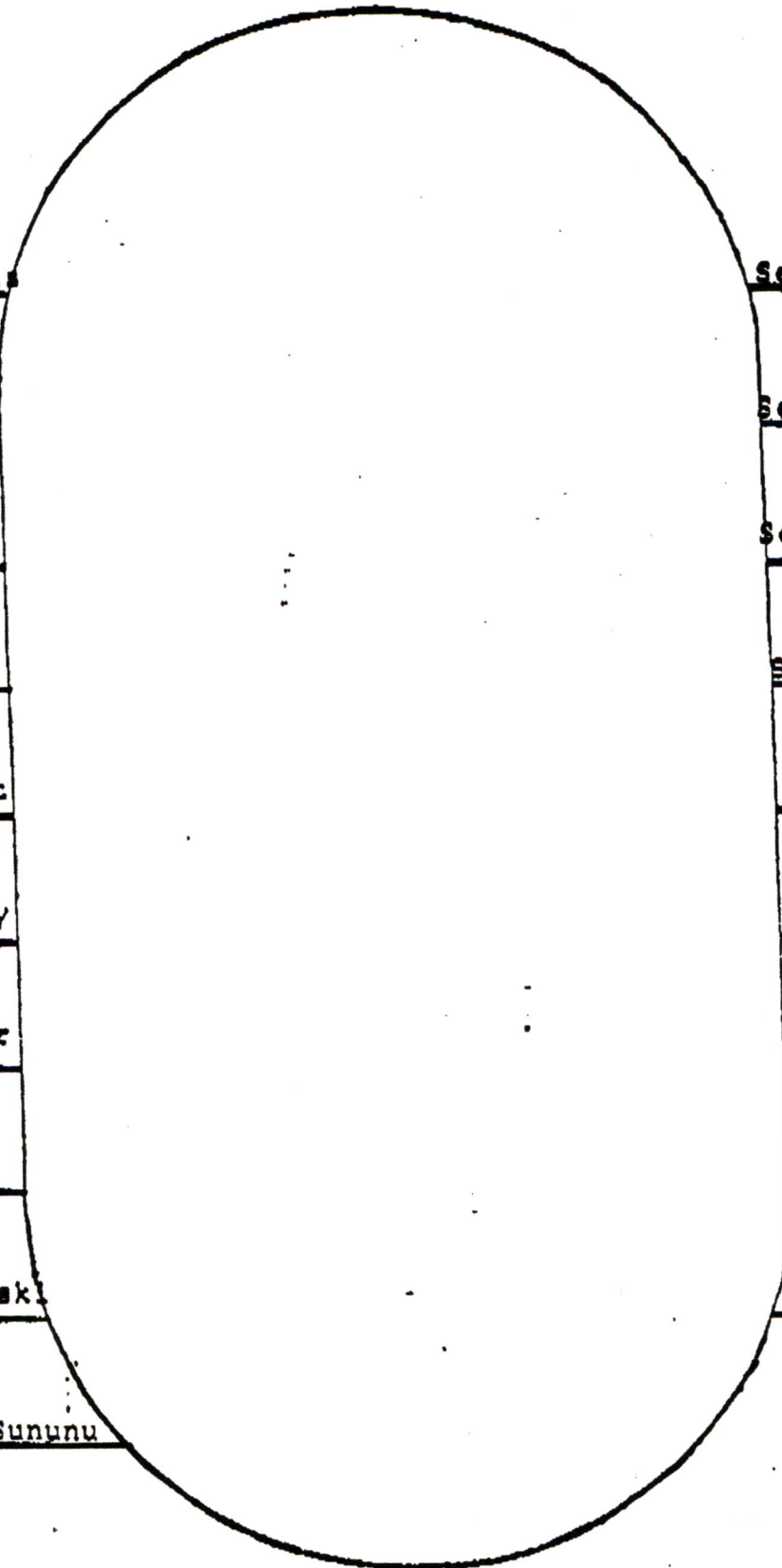
V. PERSONAL PROCEDURES:

In rare cases involving national security, personal Presidential messages or personal staff communications with David Bates or Steve Danzansky, still send the package through the staff ops system.

Place the paper in an addressed sealed envelope marked PERSONAL; fill out the due date and any other procedural instructions relevant to the document on the buck slip attached to the outside of the envelope. Give to staff ops for delivery; obviously no additional copies are needed.

###

FIREPLACE



Ambassador Hills

Secretary Cavazos

Secretary Watkins

Secretary Sullivan

Secretary Dole

Secretary Lujan

Attorney General
Hughes

Secretary Baker

Vice President

The President

Secretary Brady

Secretary Cheney

Secretary Yeutter

Secretary Mosbacher

Secretary Kemp

Secretary Skinner

Secretary Derwinski

Director Darman

Governor Sununu

CABINET ROOM SEATING

January 25, 1989

MEMORANDUM FOR WHITE HOUSE STAFF

FROM: LEE JOHNSON
DEPUTY DIRECTOR
OFFICE OF RECORDS MANAGEMENT

RE: USAGE OF THE WHITE HOUSE CORRESPONDENCE TRACKING WORKSHEET

PURPOSE: To be able to determine the disposition and status of a letter which has been sent to the President, the First Lady or a staff member.

SOURCES/ORIGINATING OFFICE

Mail Analysis
Agency Liaison (Agency Referrals)
Presidential Messages
Records Management
Other Staff Members

STAFF ROUTING PROCEDURES:

Sample 1. A letter has been sent to the President from John Smith to attend a Social Affair. The appropriate staff member chosen for a response has been determined by the Office of Mail Analysis.

The attached sample tracking sheet has been completed by the Office of Mail Analysis and Routed to Mary Rawlins (staff member) Office of Presidential Scheduling for Action (most staff members have office codes which are assigned by Records Management Office)

Mary Rawlins sends out her response to the Correspondent, John Smith. She indicates this by sending a copy of the response, the tracking sheet and incoming letter back to Records Management Office to be updated on the computer. The Disposition of the case is determined by the Type of Response

(initials of signer), Code (A = Acknowledged) and Completion Date (date of the response).

This will close the case unless the staff member assigned to the case indicates additional action is necessary.

Sample 2. If Mary Rawlins had received the same letter as in Sample 1 and did not want to respond or take any action, she could indicate that she does not want to take action and is Routing it to another office. Mary closes herself out by putting NAN (no action necessary) or a C in the disposition code field and the date (890127). She opens up another line beneath her name to another staff member to take action. She must send the case to Records Management to be updated on the computer and sent to the appropriate office.

Records can also be updated by phone by giving the ID Number, what action is to be taken, who the case is to be routed to and disposition of originating office.

AGENCY ROUTING PROCEDURES:

Sample 3. Often it is necessary for an agency to respond directly to the writer. You may also request that the agency provide a draft response for a staff member's signature.

The line under the staff member's name is opened indicating the agency he wishes to have the case routed to and the type action to be taken (see action codes). The staff member's line will still be open under Disposition. The case and a copy of the agency response will be sent back to the staff member who will determine if the case can be closed or further action is necessary. If the staff line is closed the case will be updated and closed with the agency's response (Sample 3A).

Tracking Worksheets may be obtained in Room 75.

For additional information, you may contact Wandra Simpson, Supervisor on Extension 2590.

THE WHITE HOUSE
CORRESPONDENCE TRACKING WORKSHEET

INCOMING

DATE RECEIVED: JANUARY 26, 1989

NAME OF CORRESPONDENT: MR. JOHN SMITH

SUBJECT: INVITATION FOR THE PRESIDENT TO ATTEND THE
10TH ANNIVERSARY CELEBRATION OF THE ELITE
SOCIAL CLUB IN SAN DIEGO, CALIFORNIA
JUN 28 89

ROUTE TO: OFFICE/AGENCY	(STAFF NAME)	ACTION		DISPOSITION		
		ACT CODE	DATE YY/MM/DD	TYPE RESP	C D	COMPLETED YY/MM/DD
MARY RAWLINS		ORG	89/01/26	MR	A	89/01/27
	REFERRAL NOTE:		/ /			/ /
	REFERRAL NOTE:		/ /			/ /
	REFERRAL NOTE:		/ /			/ /
	REFERRAL NOTE:		/ /			/ /
	REFERRAL NOTE:		/ /			/ /

COMMENTS: _____

ADDITIONAL CORRESPONDENTS: MEDIA:L INDIVIDUAL CODES: _____

MAIL USER CODES: (A) _____ (B) _____ (C) _____

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*****
*ACTION CODES:          *DISPOSITION          *OUTGOING          *
*                       *                       *CORRESPONDENCE:  *
*A-APPROPRIATE ACTION  *A-ANSWERED          *TYPE RESP=INITIALS *
*C-COMMENT/RECOM       *B-NON-SPEC-REFERRAL *           OF SIGNER  *
*D-DRAFT RESPONSE      *C-COMPLETED        *           CODE = A   *
*F-FURNISH FACT SHEET  *S-SUSPENDED        *COMPLETED = DATE OF *
*I-INFO COPY/NO ACT NEC*                       *           OUTGOING  *
*R-DIRECT REPLY W/COPY *                       *                       *
*S-FOR-SIGNATURE       *                       *                       *
*X-INTERIM REPLY       *                       *                       *
*****

```

REFER QUESTIONS AND ROUTING UPDATES TO CENTRAL REFERENCE
(ROOM 75, OEOB) EXT-2590
KEEP THIS WORKSHEET ATTACHED TO THE ORIGINAL INCOMING
LETTER AT ALL TIMES AND SEND COMPLETED RECORD TO RECORDS
MANAGEMENT.

THE WHITE HOUSE
CORRESPONDENCE TRACKING WORKSHEET

INCOMING

DATE RECEIVED: JANUARY 26, 1989

NAME OF CORRESPONDENT: MR. JOHN SMITH

SUBJECT: INVITATION FOR THE PRESIDENT TO ATTEND THE
10TH ANNIVERSARY CELEBRATION OF THE ELITE
SOCIAL CLUB IN SAN DIEGO, CALIFORNIA ON
JUN 28 89

ROUTE TO: OFFICE/AGENCY	(STAFF NAME)	ACTION		DISPOSITION	
		ACT CODE	DATE YY/MM/DD	TYPE RESP	C COMPLETED D YY/MM/DD
_____	_____	_____	_____	_____	_____
MARY RAWLINS	_____	ORG	89/01/26	NAN	C 89/01/27
_____	REFERRAL NOTE: _____	_____	_____	_____	_____
ROGER PORTER	_____	RSA	89/01/27	_____	____/____/____
_____	REFERRAL NOTE: <i>refer to staff for action</i>	_____	____/____/____	_____	____/____/____
_____	REFERRAL NOTE: _____	_____	____/____/____	_____	____/____/____
_____	REFERRAL NOTE: _____	_____	____/____/____	_____	____/____/____
_____	REFERRAL NOTE: _____	_____	____/____/____	_____	____/____/____

COMMENTS: _____

ADDITIONAL CORRESPONDENTS: MEDIA:L INDIVIDUAL CODES: _____

MAIL USER CODES: (A) _____ (B) _____ (C) _____

```

*****
*ACTION CODES:          *DISPOSITION          *OUTGOING          *
*                       *                       *CORRESPONDENCE:  *
*A-APPROPRIATE ACTION  *A-ANSWERED          *TYPE RESP=INITIALS *
*C-COMMENT/RECOM       *B-NON-SPEC-REFERRAL *           OF SIGNER *
*D-DRAFT RESPONSE      *C-COMPLETED        *           CODE = A   *
*F-FURNISH FACT SHEET  *S-SUSPENDED        *COMPLETED = DATE OF *
*I-INFO COPY/NO ACT NEC*                       *           OUTGOING *
*R-DIRECT REPLY W/COPY *                       *                       *
*S-FOR-SIGNATURE       *                       *                       *
*X-INTERIM REPLY       *                       *                       *
*****

```

REFER QUESTIONS AND ROUTING UPDATES TO CENTRAL REFERENCE
(ROOM 75, OEOB) EXT-2590
KEEP THIS WORKSHEET ATTACHED TO THE ORIGINAL INCOMING
LETTER AT ALL TIMES AND SEND COMPLETED RECORD TO RECORDS
MANAGEMENT.



WHITE HOUSE
CORRESPONDENCE TRACKING WORKSHEET

O - OUTGOING

H - INTERNAL

I - INCOMING

Date Correspondence Received (YY/MM/DD) 89101123

Name of Correspondent: John Smith

MI Mail Report

User Codes: (A) _____ (B) _____ (C) _____

Subject: Writer is having difficulty receiving assistance for obtaining Section 8 Housing Program application. Would like the President to look into the matter.

ROUTE TO:

ACTION

DISPOSITION

Office/Agency (Staff Name)	Action Code	Tracking Date YY/MM/DD	Type of Response	Code	Completion Date YY/MM/DD
<u>OKELL</u>	ORIGINATOR	<u>8910123</u>			<u>1 1</u>
<u>99 HUD</u>	R	<u>8910123</u>		<u>A</u>	<u>8910127</u>
		<u>1 1</u>			<u>1 1</u>
		<u>1 1</u>			<u>1 1</u>
		<u>1 1</u>			<u>1 1</u>

ACTION CODES:

- A - Appropriate Action
- C - Comment/Recommendation
- D - Draft Response
- F - Furnish Fact Sheet to be used as Enclosure

- I - Info Copy Only/No Action Necessary
- R - Direct Reply w/Copy
- S - For Signature
- X - Interim Reply

DISPOSITION CODES:

- A - Answered
- B - Non-Special Referral
- C - Completed
- S - Suspended

FOR OUTGOING CORRESPONDENCE:

- Type of Response = Initials of Signer
- Code = "A"
- Completion Date = Date of Outgoing

Comments: _____

Keep this worksheet attached to the original incoming letter.
 Send all routing updates to Central Reference (Room 75, OEOP).
 Always return completed correspondence record to Central Files.
 Refer questions about the correspondence tracking system to Central Reference, ext. 2590.

WHITE HOUSE
CORRESPONDENCE TRACKING WORKSHEET

- O - OUTGOING
 - H - INTERNAL
 - I - INCOMING
- Date Correspondence Received (YY/MM/DD) 89101123

Name of Correspondent: John Smith

MI Mail Report User Codes: (A) _____ (B) _____ (C) _____

Subject: Writer is having difficulty receiving assistance for obtaining Section 8 Housing Program Application. Would like the President to look into the matter.

ROUTE TO: ACTION DISPOSITION

Office/Agency (Staff Name)	Action Code	Tracking Date YY/MM/DD	Type of Response	Completion Date YY/MM/DD
<u>90 KELL</u>	ORIGINATOR	<u>8910123</u>	<u>SK</u>	<u>A 8910127</u>
<u>99 HUD</u>	<u>D</u>	<u>8910123</u>		<u>C 8910125</u>
	Referral Note:	<u>for signature of Sally Kelly</u>		
	Referral Note:			
	Referral Note:			
	Referral Note:			

- ACTION CODES:
- A - Appropriate Action
 - C - Comment/Recommendation
 - D - Draft Response
 - F - Furnish Fact Sheet to be used as Enclosure

- I - Info Copy Only/No Action Necessary
- R - Direct Reply w/Copy
- S - For Signature
- X - Interim Reply

- DISPOSITION CODES:
- A - Answered
 - B - Non-Special Referral
 - C - Completed
 - S - Suspended

FOR OUTGOING CORRESPONDENCE:

Type of Response = Initials of Signer
 Code = "A"
 Completion Date = Date of Outgoing

Comments: _____

Keep this worksheet attached to the original incoming letter.
 Send all routing updates to Central Reference (Room 75, OEOB).
 Always return completed correspondence record to Central Files.
 Refer questions about the correspondence tracking system to Central Reference, ext. 2590.

WHITE HOUSE CORRESPONDENCE TRACKING WORKSHEET

- O - OUTGOING
- H - INTERNAL
- I - INCOMING
Date Correspondence Received (YY/MM/DD) _____ / _____ / _____

Name of Correspondent: _____

MI Mail Report User Codes: (A) _____ (B) _____ (C) _____

Subject: _____

ROUTE TO:

ACTION

DISPOSITION

Office/Agency (Staff Name)	Action Code	Tracking Date YY/MM/DD	Type of Response	Code	Completion Date YY/MM/DD
_____	ORIGINATOR	_ / _ / _	_____	_	_ / _ / _
_____	_____	_ / _ / _	_____	_	_ / _ / _
_____	_____	_ / _ / _	_____	_	_ / _ / _
_____	_____	_ / _ / _	_____	_	_ / _ / _
_____	_____	_ / _ / _	_____	_	_ / _ / _

Referral Note: _____

 Referral Note: _____

 Referral Note: _____

 Referral Note: _____

 Referral Note: _____

- | | | |
|--|---|--|
| <p>ACTION CODES:</p> <ul style="list-style-type: none"> A - Appropriate Action C - Comment/Recommendation D - Draft Response F - Furnish Fact Sheet
to be used as Enclosure | <ul style="list-style-type: none"> I - Info Copy Only/No Action Necessary R - Direct Reply w/Copy S - For Signature X - Interim Reply | <p>DISPOSITION CODES:</p> <ul style="list-style-type: none"> A - Answered B - Non-Special Referral C - Completed S - Suspended <p>FOR OUTGOING CORRESPONDENCE:</p> <ul style="list-style-type: none"> Type of Response = Initials of Signer Code = "A" Completion Date = Date of Outgoing |
|--|---|--|

Comments: _____

Keep this worksheet attached to the original incoming letter.
 Send all routing updates to Central Reference (Room 75, OEOB).
 Always return completed correspondence record to Central Files.
 Refer questions about the correspondence tracking system to Central Reference, ext. 2590.

THE WHITE HOUSE
WASHINGTON

January 23, 1990

Ken - Good!
[Signature]
1/23

MEMORANDUM FOR DAVID BATES

FROM: KEN YALE *ky*
SUBJECT: DPC Correspondence

Since last year, the volume of mail for the DPC has increased steadily over the months. Therefore, I felt it would be useful for our staff to begin an informal process of logging-in and tracking each letter received by the DPC.

Mary Tsivgoulis has begun a DPC correspondence log notebook which is kept on file in her office. Each piece of mail received by myself, John Schall or Dan Heimbach is entered into the log by Mary or Dean as follows:

Date Recvd.	Correspondent's Name & Address	Subject	Staff Member Assigned To	Form of Disposition & Date
-------------	--------------------------------	---------	--------------------------	----------------------------

Should the letter require staffing to another agency for direct or draft response, it is referred to the White House Correspondence Unit where it is formally tracked until completion.

This informal system for logging-in and tracking DPC letters will enable us to more efficiently respond to letters received, not only from VIPs, but from the general public as well.

THE WHITE HOUSE

WASHINGTON

THE CABINET
Departments and Agencies
Protocol Order

Vice President
State
Treasury
Defense
Justice
Interior
Agriculture
Commerce
Labor
HHS
HUD
Transportation
Energy
Education
Veterans
OMB
USTR

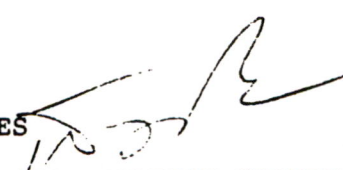
.....

NSF
SBA
OPM
NASA
GSA
CEQ
CIA
OSTP
CEA
EPA
UN
ONDCP

THE WHITE HOUSE
WASHINGTON

February 27, 1990

MEMORANDUM TO OCA STAFF

FROM: DAVID BATES 

SUBJECT: OCA PAPER COORDINATION SYSTEM

A new OCA paper flow system has been developed over the past few weeks through consultation with Steve Danzansky, Holly Williamson and the rest of the OCA staff. Modifications may, of course, be necessary as we put the theories into practice over the next few weeks, but I am sure this system will prove helpful to us all.

Thanks for all your cooperation.

THE WHITE HOUSE
WASHINGTON
February 27, 1990

MEMORANDUM TO DAVID BATES

FROM: HOLLY WILLIAMSON

SUBJECT: OCA PAPER COORDINATION SYSTEM

I. OBJECTIVE:

To implement a system that provides coordination and tracking of information for the Office of Cabinet Affairs (including EPC, DPC, Liaison and Ag. Trade); that establishes concurrences and improves information sharing among OCA staff; that provides early warning signals on cross cutting issues; that provides Cabinet Departments, Agencies, Councils and other White House staff with consistent, standard and accurate information; and that provides all such information in a timely manner.

II. INFORMATION IDENTIFICATION:

The following list highlights routine categories of information either generated by or regularly used by OCA staff. Staff operations (staff ops) will be responsible for the coordination of distribution of this information.

A. Information staff ops will route to OCA staff:

OCA staff will receive individual copies of some of the information listed below and office pool copies of others.

1. The Press Secretary's daily briefings.
2. OMB daily legislative highlights.
3. President's daily public schedule.
4. Weekly legislative summary report.
5. Weekly Department legislative reports.
6. OMB Friday economic report.
7. Approved Presidential activities -- "pink sheets."
8. Presidential speeches for OCA staffing (see flow chart).
9. Other White House staffings for OCA.

B. Information staff ops will route to OCA staff and/or West Wing:

1. Schedule proposals/briefing papers (from Bates; cc Danzansky).

2. EPC/DPC documents (see flow chart).
3. Memos for the President (from Bates; approval Danzansky).
4. Memos for Bates and/or Danzansky.
5. OCA papers for White House staffing.
6. OCA papers for the NSC.
7. Weekly summary of OCA meetings.
8. The Cabinet Report.
9. An index of Departmental reports received by the Clerk's office.

Presidential correspondence will continue to be coordinated by Denise/Marnie.

III. SYSTEMATIC METHODS:

A. Standard daily deliveries

Staff ops will conduct 4 standard daily deliveries of materials (8:45 am, 11:00 am, 2:30 pm and 5:00 pm) to and from the West Wing, in addition to urgent runs on an "as needed" basis.

B. Standard staffing and routing sheets

To facilitate the flow of information, I have generated the following forms for the OCA staff:

- External OCA staffing sheet (see attached sample #1).
- Internal OCA staffing sheet (see attached sample #2).
- Buck slip to Holly from OCA staff (each person will have their own pad).

IV. STANDARD PROCEDURES:

1. When OCA staff has a paper ready to go through the staff ops system (regardless if they are the originator or the assigned action person), 2 xeroxed copies should be attached to the original paper, in addition to the buck slip they have completed.

2. When OCA staff is sending something through the staff ops system, please distribute any FYI and/or concurrent copies to the appropriate parties (except to David Bates or Steve Danzansky; they will receive copies from staff ops). OCA staff should also check off the recipient names on the buck slip. (If on occasion OCA staff is not able to distribute these, merely include in the comment section: "FYI's not distributed," and staff ops will distribute for you.)

3. When staff ops assigns the action on a paper, distribution of FYI and/or concurring copies will occur simultaneously.

4. The internal OCA staffing sheet should stay with the original assignment during all stages of the routing process.

5. When a document is of an urgent nature, affix a red dot on the buck slip you have completed, in addition to checking off the "urgent" box.

6. Deliver the complete package of information to Room 230 and place in the appropriately marked in-box: To Bates, To Danzansky, To Other.

7. A stamp will be available in my office for identifying close hold or sensitive documents.

8. If I am not in and something needs to be discussed with me or needs immediate attention, please talk to Marcy Anderson in Room 231.

9. Once I retrieve the information from my in-box, the document will begin its routing process with the assignment of a tracking number and confirmation of appropriate concurrences and FYI's. The urgency of the package will determine its need to be moved immediately or on the next standard delivery. When computerized tracking is necessary, the document will not be logged into the system until after it has been routed to its appropriate destination. This ensures the system moves quickly yet still efficiently.

V. PERSONAL PROCEDURES:

In rare cases involving national security, personal Presidential messages or personal staff communications with David Bates or Steve Danzansky, still send the package through the staff ops system.

Place the paper in an addressed sealed envelope marked PERSONAL; fill out the due date and any other procedural instructions relevant to the document on the buck slip attached to the outside of the envelope. Give to staff ops for delivery; obviously no additional copies are needed.

###

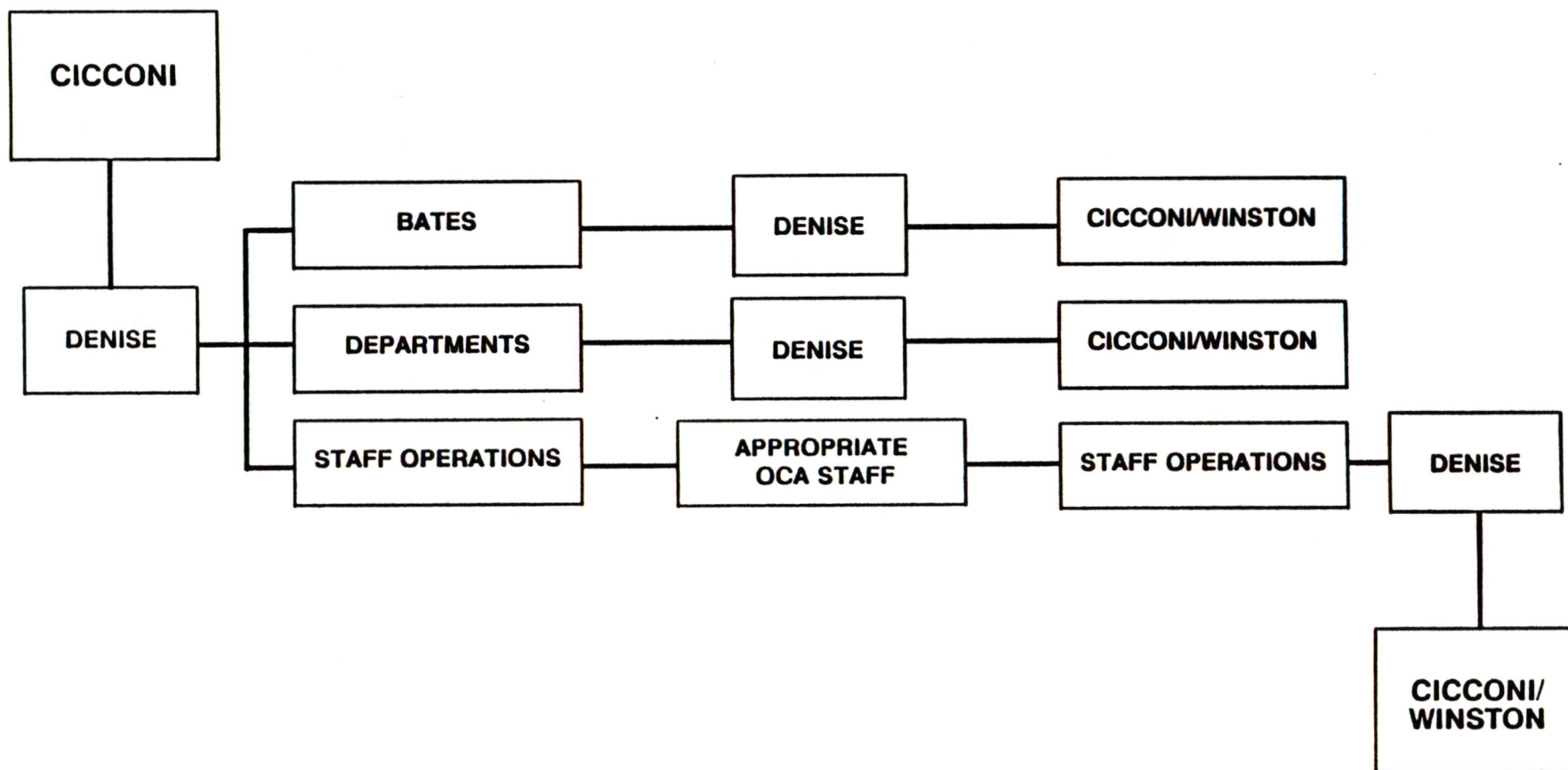
Council Paper Flow Actions

Action From Flow Chart	* Bates/Danzansky Approval	* Danzansky Approval	* Bates/Danzansky CC	* Danzansky CC
Charter new working Group	X			
Separate ad hoc status reports to Cabinet Secretary from Council Exec. Secs.				X
Separate ad hoc reports to Chairman Pro Temps from Council Exec. Secs.			X	
Combined EPC/DPC weekly report to WH Chief of Staff from Cabinet Secretary		X		
DPC/EPC meeting package (package delivered to external attendees by Council Exec. Secs.) internal attendees by Staff Ops.)	** X			
Confidential meeting memo to Chairman Pro Temps from Council Exec. Secs.			X	
Decision Memo draft to Cicconi – comments return directly to Council Exec. Sec.	* X		X	
Council Exec. Secs. send Decision Memo to Chairman Pro Temps for signature			X	
Signed Document to the President				

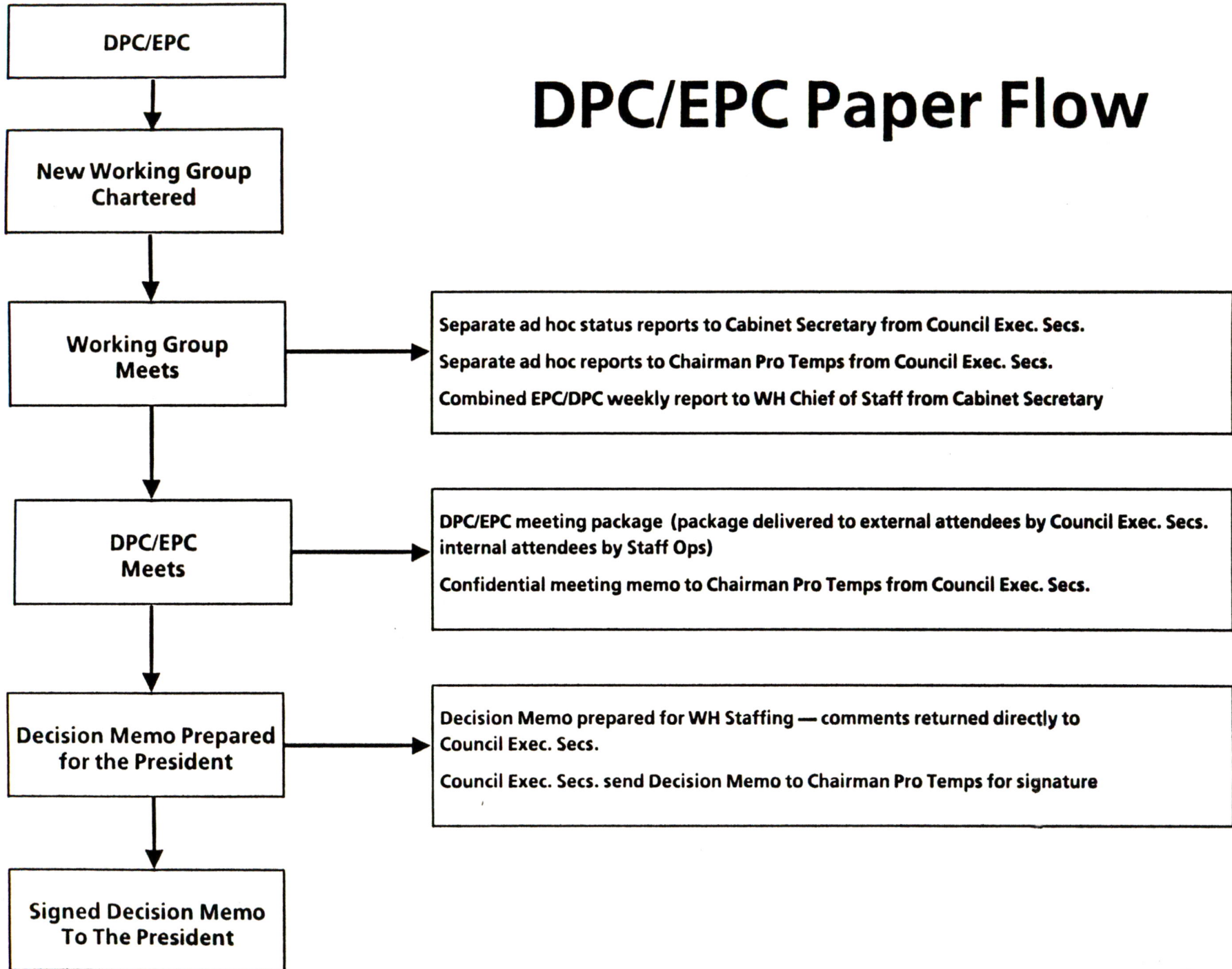
* should be directed to Staff Operations for processing and routing.

** 2 hour time binder.

Presidential Speeches Flow Chart



DPC/EPC Paper Flow



Sample # 1

Document No. _____ CA

THE WHITE HOUSE OFFICE OF CABINET AFFAIRS STAFFING MEMORANDUM

Date: _____

Due by: _____

Subject: _____

From: _____

	Action	FYI		Action	FYI
ALL CABINET MEMBERS	<input type="checkbox"/>	<input type="checkbox"/>	CIA	<input type="checkbox"/>	<input type="checkbox"/>
Vice President	<input type="checkbox"/>	<input type="checkbox"/>	CEA	<input type="checkbox"/>	<input type="checkbox"/>
Agriculture	<input type="checkbox"/>	<input type="checkbox"/>	CEQ	<input type="checkbox"/>	<input type="checkbox"/>
Commerce	<input type="checkbox"/>	<input type="checkbox"/>	EPA	<input type="checkbox"/>	<input type="checkbox"/>
Defense	<input type="checkbox"/>	<input type="checkbox"/>	GSA	<input type="checkbox"/>	<input type="checkbox"/>
Education	<input type="checkbox"/>	<input type="checkbox"/>	NASA	<input type="checkbox"/>	<input type="checkbox"/>
Energy	<input type="checkbox"/>	<input type="checkbox"/>	National Science Foundation	<input type="checkbox"/>	<input type="checkbox"/>
HHS	<input type="checkbox"/>	<input type="checkbox"/>	ONDCP	<input type="checkbox"/>	<input type="checkbox"/>
HUD	<input type="checkbox"/>	<input type="checkbox"/>	OPM	<input type="checkbox"/>	<input type="checkbox"/>
Interior	<input type="checkbox"/>	<input type="checkbox"/>	OSTP	<input type="checkbox"/>	<input type="checkbox"/>
Justice	<input type="checkbox"/>	<input type="checkbox"/>	SBA	<input type="checkbox"/>	<input type="checkbox"/>
Labor	<input type="checkbox"/>	<input type="checkbox"/>	UN	<input type="checkbox"/>	<input type="checkbox"/>
OMB	<input type="checkbox"/>	<input type="checkbox"/>	Cicconi (<i>For WH Staffing</i>)	<input type="checkbox"/>	<input type="checkbox"/>
State	<input type="checkbox"/>	<input type="checkbox"/>	_____	<input type="checkbox"/>	<input type="checkbox"/>
Transportation	<input type="checkbox"/>	<input type="checkbox"/>	_____	<input type="checkbox"/>	<input type="checkbox"/>
Treasury	<input type="checkbox"/>	<input type="checkbox"/>	_____	<input type="checkbox"/>	<input type="checkbox"/>
USTR	<input type="checkbox"/>	<input type="checkbox"/>	_____	<input type="checkbox"/>	<input type="checkbox"/>
Veterans	<input type="checkbox"/>	<input type="checkbox"/>	_____	<input type="checkbox"/>	<input type="checkbox"/>

COMMENTS:

Sample # 2

Document No. _____ CA

OFFICE OF CABINET AFFAIRS STAFFING MEMORANDUM

Date: _____

Due by: _____

Subject: _____

From: _____

	ACTION	CONCUR	FYI		ACTION	CONCUR	FYI
BATES	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	JACKSON	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
DANZANSKY	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	MCBEE	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ADAIR	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	SCHALL	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
BUCHHOLZ	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	WETHINGTON	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
D'ANDREA	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	WILLIAMSON	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
DEWITT	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	YALE	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
DUGGAN	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
EVANS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
FARRAR	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
HEIMBACH	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Comments:

THE WHITE HOUSE

WASHINGTON

THE CABINET
Departments and Agencies
Protocol Order

Vice President
State
Treasury
Defense
Justice
Interior
Agriculture
Commerce
Labor
HHS
HUD
Transportation
Energy
Education
Veterans
OMB
USTR

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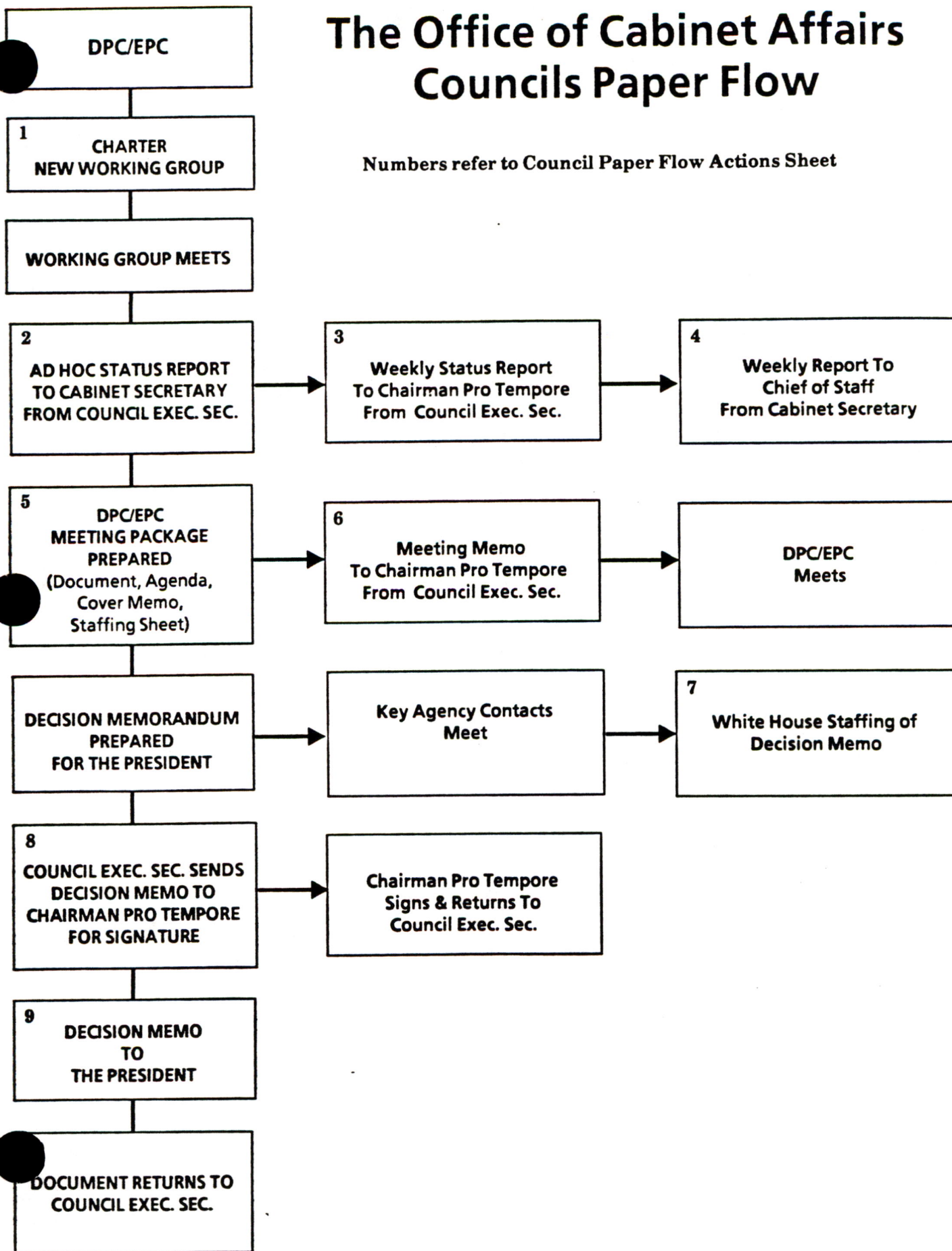
NSF
SBA
OPM
NASA
GSA
CEQ
CIA
OSTP
CEA
EPA
UN
ONDCP

Council Paper Flow Actions

Action From Flow Chart	Deliver to Staff Ops for Bates/Danzansky & Or Tracking	Bates/Danzansky Approval	Danzansky Approval	Bates/Danzansky CC	Danzansky CC
1. Charter new working Group	X	X			
2. AD Hoc status report to Cabinet Secretary from Council Exec. Sec.	X				X
3. Weekly report to Chairman Pro Tempore from Council Exec. Sec.	X			X	
4. Weekly report to Chief of Staff from Cabinet Secretary	X		X		
5. DPC/EPC meeting package (package delivered to external attendees by Council Exec. Sec. - internal attendees by Staff Ops.)	X	X			
6. Meeting Memo to Chairman Pro Tempore from Council Exec. Sec.	X			X	
7. Decision Memo draft - (to Cicconi by Staff Ops - comments return directly to Council Exec. Sec.)	X	X			
8. Council Exec. Sec. sends Decision Memo to Chairman Pro Tempore	X			X	
9. Signed Document to the President (through Staff Ops to Cicconi)	X				
10. Decision Memo to the President returns to Council Exec. Sec. (through Cicconi to Staff Ops)	X				

The Office of Cabinet Affairs Councils Paper Flow

Numbers refer to Council Paper Flow Actions Sheet



Mary T.

Departmental and Agency Assignments

Office of Policy Development

Foreign Policy

Commerce Department	Larry Lindsey Steve Farrar	Domestic Policy International Policy
Council of Economic Advisers	Larry Lindsey Steve Farrar	Domestic Policy International Policy
Defense Department	Brad Mitchell	
Education Department	Rae Nelson	
Energy Department	Nancy Maloley	
Environmental Protection Agency	Nancy Maloley	
Health and Human Services Department	Hanns Kuttner	
Housing and Urban Development Department	Larry Lindsey Hanns Kuttner	Economic Policy Social Policy
Interior Department	Nancy Maloley	
Justice Department	Marianne McGettigan	
Labor Department	Larry Lindsey	
NASA	Brad Mitchell	
Office of National Drug Control Policy	Rae Nelson	
Office of National Service	Marianne McGettigan	
Office of Science and Technology Policy	Brad Mitchell	
Small Business Administration	Brad Mitchell	
State Department	Steve Farrar	
Transportation Department	Mike Klausner	

*Low Income/
Welfare*

Germanis, Peter

Treasury Department

Larry Lindsey
Steve Farrar

Domestic Policy
International Policy

United States Trade
Representative

Steve Farrar

Veterans Affairs
Department

Mike Klausner

08/08/89

THE WHITE HOUSE
WASHINGTON

Date: April 26, 1990

~~CONFIDENTIAL~~

DECLASSIFIED

TO: Justine

PER NSC WAIVER,
By PM NARA, Date 03/15/23

FROM: **KEN YALE**
Special Assistant to the President and
Executive Secretary to the Domestic
Policy Council

Thank you for the note. As you can see, we will try to coordinate better in the future. Unfortunately, due to the recent staff change, the remaining assistants are picking up a heavier workload. I trust this will be remedied in the near future. In the mean time, please bear with us.

Again, thanks for the heads up!

THE WHITE HOUSE
WASHINGTON

Date: April 26, 1990

TO: Mary Tsivgoulis

FROM: KEN YALE
Special Assistant to the President and
Executive Secretary to the Domestic
Policy Council

Please note the attached message. As you know, we are relying on you to coordinate closely with Honor on all DPC and Cabinet level meetings. This includes notifying her of all information pertaining to such meetings. I would appreciate it if we could pay attention to their needs.

Thank you. Please feel free to see me if you have any questions on this.

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231143132 4/4

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231143132 4/4

231143132 4/4

231143132 4/4

Date: 9/24

Scheduling offices.
Thanks.

TO:

Ken

FROM:

JUSTINE D'ANDREA
Associate Director
Office of Cabinet Affairs

F.Y.I - No one ever told
Honor that the DPC meeting
today was for an hour and
a half as the paper to
the AG mentions.

Could you make sure that
in the future -- we coordinate
on the duration of the
DPC meetings -- so we in turn
can inform the Secretaries

WHITE HOUSE

WASHINGTON

NOV 10 1950

DEPARTMENT OF STATE

1

2

3

4

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RECEIVED

THE WHITE HOUSE

WASHINGTON

January 31, 1990

MEMORANDUM FOR ALL OFFICE OF CABINET AFFAIRS STAFF

FROM: DAVID Q. BATES
SUBJECT: DPC and EPC Staff

Effective February 1, the DPC and EPC Deputy Executive Secretaries will be designated Associate Directors.

Dan Heimbach and John Schall will have the title of Associate Director for Domestic Policy and Deputy Executive Secretary to the Domestic Policy Council.

Todd Buchholz and Steve Farrar will have the title of Associate Director for Economic Policy and Deputy Executive Secretary to the Economic Policy Council.

This change is intended to reflect the broad range of issues for which the Cabinet Councils are responsible, and will correspond to the positions of Associate Director in other offices, such as Cabinet Affairs and the Office of Policy Development.