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7/16/79

EYES ONLY

TO: PRESIDENT CARTER

FROM: HAMILTON JORDAN *HJ*

This is the memo that I promised you yesterday. If you had a tough and efficient chief-of-staff, deadlines like this would be met.

Please give me your frank reaction and advice. I have never felt such a great challenge as I feel now nor have I ever been more determined to succeed.

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A NEW APPROACH AND ATTITUDE ABOUT GOVERNMENT AND GOVERNING

Introduction

We implied in the exercise of the last ten days and in your speech last night that you would take a different attitude and a different approach to both your duties as leader of the government and leader of the society.

We also agreed that you had become preoccupied with your responsibilities as leader of the government at the expense of leading the country and are identified by the American people in that same way.

Obviously, we have to think, plan and act now to make that transition from managing the government to leading the country. The American people want you to make this change that you have recognized, but they also want to have some sure sense that you have left the mechanism of government in good hands and in good shape.

Introduction

To begin with, it is important that I acknowledge a few things.

There is no question at the outset that I did largely ignore the merit and brilliance of Pat Caddell's memorandum and analysis. Pat had yelled "wolf" so many times that I discounted his harsh analysis of our situation as well as his unconventional approach to our problems. However, after exposure to his work and time for reflection, there is no question that Pat's original concept was sound and that many of his suggestions were and are valid.

The fortunate thing is that you were in a frame of mind to think and reflect on your situation and that you did not ignore Pat's good analysis and advice.

In preparing this memorandum, I reviewed Pat's memorandum to insure that I did not discard any good ideas nor violate the basic concept that he presented. When all is said and done, it can be distilled into several basic thoughts/principles:

- You have agreed to adopt a different attitude about your Presidency
- You have agreed to lead the country instead of manage the government
- You have agreed for the need of a different structure and mechanism to accomodate this change in focus on your own part
- You have agreed for the need for greater discipline and accountability in the White House and the government
- You have agreed that there needs to be additional mechanisms inside and outside of government to involve the American people in the definition of country's goals and a way for you, as President, to receive fresh ideas and concepts

In the following pages, I have tried to develop these general principles based on your own preferences into specific actions that you as President can and should take.

After receiving your reactions to this, it will largely be my responsibility to execute this plan. I am ready and anxious to proceed. However, I will need time to think, to plan and to reflect as I have to work out a number of complicated personnel and structural problems.

I know that you will be pushing me and I expect and will need that pressure. However, from the outset, it should be clear that this whole effort will unfold over the weeks and months ahead. And while there should be no unnecessary delays, it is important that we have good planning, good execution and consistency of purpose.

It cannot, should not and will not happen in the first week or ten days. What is important is that two months from now the collective judgment of the media and the political community be, "that President Carter has

changed the way that he conducts his Presidency and Administration and is really leading the country".

I will meet regularly with Rosalynn, Pat Caddell, Jim McIntyre, Jody Powell and Jerry Rafshoon to keep them informed of my plans and to solicit their advice and reactions. I know that Pat will be an effective force to keep us all true to the basic concepts that evolved at Camp David. I have a great affection for Pat and acknowledge the tremendous contribution that he has made. However, as I am trying to construct this engine, I cannot and will not have his sense of constant panic deter me from doing the many time consuming and unpleasant things that must be done to make this new attitude and mechanism a reality.

If you and the First Lady will trust me and give me the support and flexibility that I will need, we cannot and will not fail.

In this section, I attempt to review and analyze the following things:

- The Domestic Policy Decision-Making Process
- The Need for a White House Secretariat/Executive Committee
- The Need for A Planning Office
- The Need for Changes in Personnel
- The Chief-of-Staff Role

In analyzing these first four topics, my presumption was that you wanted me to be a strong Chief-of-Staff, and are willing to give me the authority and support that I will need to be effective.

Domestic Policy Decision-Making at Present

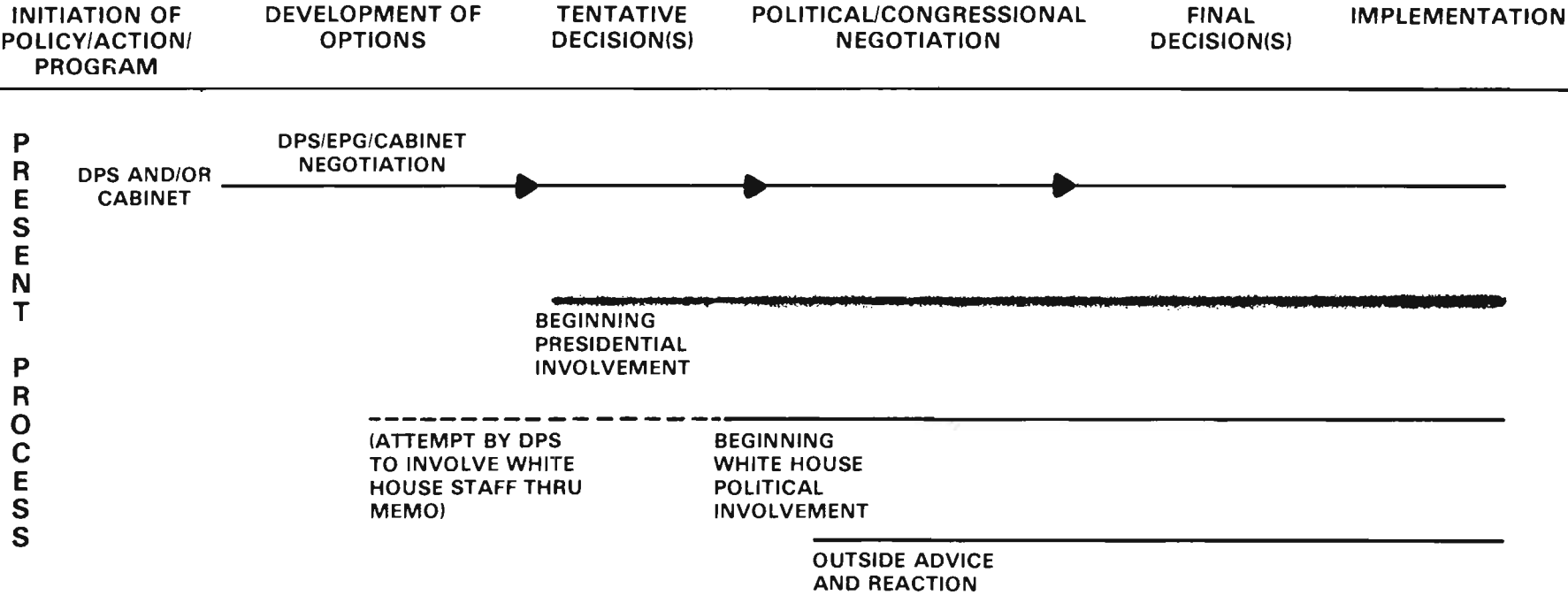
The basic strength of your domestic policy decision-making process at present is that it is managed by Stuart Eizenstat. Its basic weakness is that the options are negotiated almost unilaterally by Stu and his staff with the Cabinet and that the political input from the White House staff does not come until very late in the process.

This is not Stu's fault as he always circulates bulky memoranda to the senior staff describing the problem and the various positions of the agencies. Because we are expected to react to a long and detailed explanation of the problem, we very seldom get involved at this early opportunity. Instead, most of us get dragged in toward the end when some person or group inside or outside government solicits our support for their own position or point of view, and when tentative and/or final de-

cisions have been made. At this point it becomes a matter of trying to get the President to modify or expand some component of the program. This is also when we usually have bad leaks about the infighting which is taking place at the White House and among the Cabinet.

I have tried to describe the present process in the following graph:

DOMESTIC POLICY DECISION-MAKING PROCESS



Let me summarize the problems with the present process:

1. Early political analysis and scrutiny of both the policy and the process is lacking because at present there is no mechanism which forces the senior staff to get involved in the process in the initial stages.

2. By default, Stu and his staff begin discussions with the Cabinet on the substance without a clear indication as to the political dimensions of the problem and lacking a sense of who our enemies and allies might be.

3. Because the White House staff does not involve itself at the outset, we forego the opportunity to make soundings in the political community and Congress and provide meaningful input into the development of the options. To Stu's credit, he and his staff, which is already overburdened and overworked, spends

time along the way taking a political reading. It simply is not and cannot be as exhaustive an exercise as if you had the entire senior staff involved checking with their own networks and constituencies.

4. There is very little chance that new ideas and unconventional approaches to our problems will evolve from this process. Almost from the outset, Stu and his staff are submerged in the details of the problem, keenly aware of budgetary and political limitations. Stu and his staff do not have the time to listen to and avidly search for new ideas and approaches. The question is seldom posed, "Maybe this is a problem the government cannot really solve - why don't we leave it alone?", or "Maybe legislation is not the answer - we should spend out time trying to get the private sector involved solving this problem."

I believe that with my new position and with the introduction of a new component into the process that we

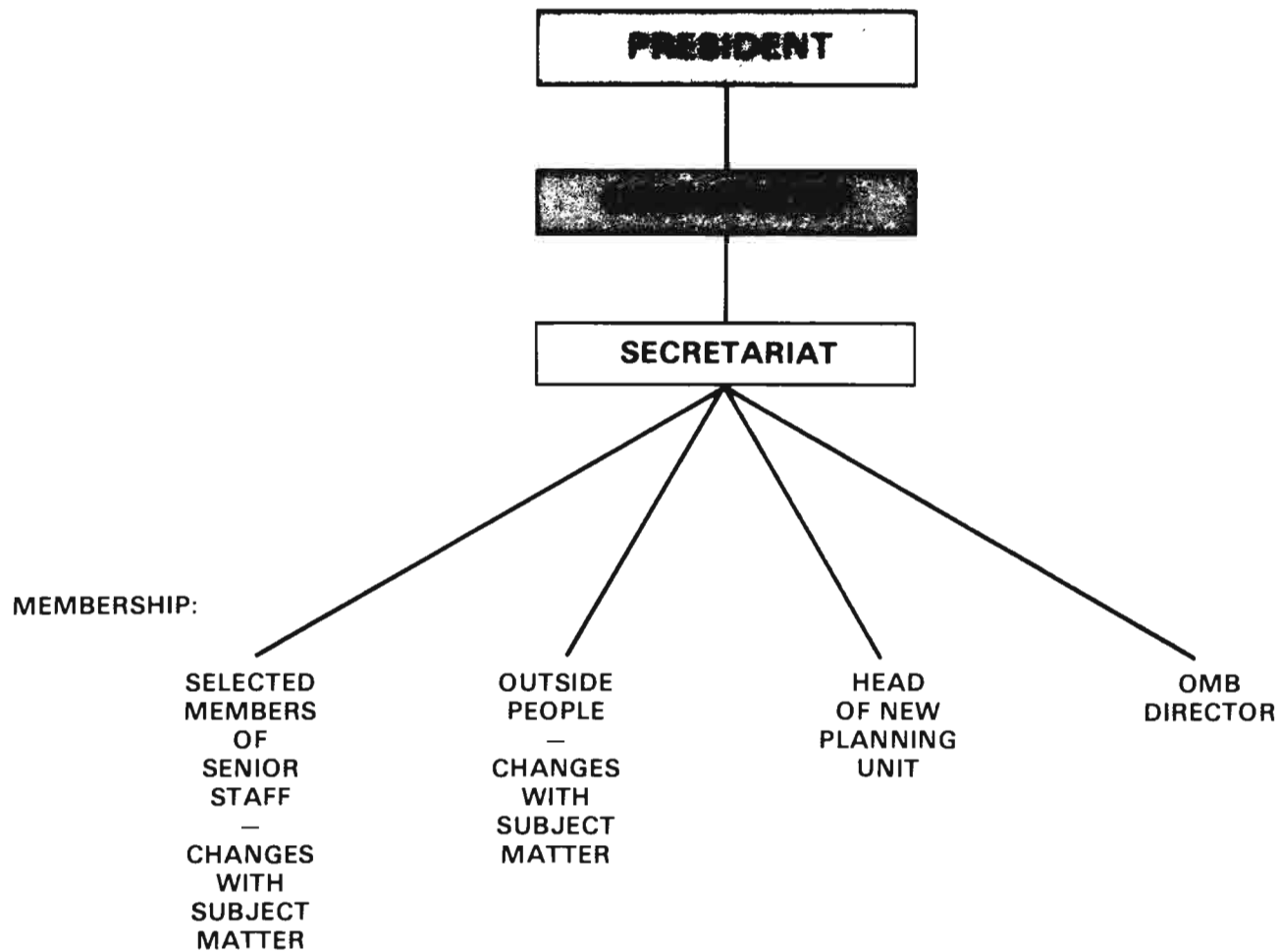
can strengthen the process and that it will allow Stu and his staff to focus on those things that they do best.

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This is an expansion of Pat's idea that we have a staff "secretariat"*. The "Secretariat" (or Executive Committee of the Senior Staff) would have a small support staff and its composition is outlined on the following graph:

*Mr. Kirbo correctly objects to this name - suggests that people will think that we are all Communists.

ORGANIZATION AND COMPOSITION OF THE SECRETARIAT



The advantages of the "Secretariat" approach is that;
~~it~~:

1. It forces the senior staff to function as a unit.
2. It forces the Cabinet and the Domestic Policy Council and the issues they advocate to a broad scrutiny from the outset of the decision-making process.
3. It will help Stu. By the "Secretariat" being involved from the outset, we can assist Stu in defining the options as opposed to coming in late in the process and advocating changes that diminish the integrity of the policy and/or action.
4. The inclusion of Jim McIntyre in the Secretariat provides early governmental and budgetary perspectives.
5. The inclusion of the Director of the Planning Unit (which is explained elsewhere in this memorandum) in the Secretariat insures that there will be fresh ideas and concepts considered and that there will be someone involved who can challenge conventional thinking and pursue non-governmental solutions.
6. The inclusion of persons from the outside from time to time will have the same effect.

Through the involvement of the Secretariat, the domestic decision-making process would work as follows:

THE NEED FOR A PLANNING UNIT

I believe that we have generally recognized and agreed that there is a need for a planning unit in the Administration to provide you and us with a continuing stream of new ideas and concepts. Also, it would be the responsibility of this group to challenge conventional wisdom and notions and to question decisions that we were about to make.

The basic premise is that the bureaucracy works in a way that compromises your decision-making process and that the end result is a series of compromises between agencies and conflicting political interests that very seldom holds much hope for dealing with the problem.

In considering the scope, the purpose, the organization and the relationship of this planning unit to the other parts of government, a number of questions are necessary:

- What would be the purpose of this unit?
- Where would the staff be housed?
- What protection would they have from being stifled by the White House and the bureacracy?
- What type person would head this unit?
- How would they relate to the senior staff?
- How would they relate to the President?
- What would their relationship be with the private sector and the outside world?
- How would their thoughts and ideas receive a fair hearing?
- Would they have a chance to question decisions being made?

THESE

~~This~~ are valid and necessary questions to pose and consider prior to making a final decision to have a planning unit for it would serve no useful purpose to establish a unit that (on one extreme) became bogged down in government nor one that (on the other extreme) was so far removed from the process as to not be relevant.

I will try to respond to these questions:

1. The purpose of this unit would be to develop, receive and evaluate new ideas and concepts and to see that they received a fair hearing by persons in the White House and the President, and to be in a position to challenge and question decisions and policies being considered by the President and his advisers.

2. For the purpose of being in a strong position with the bureacracies of government and also in a position to deal with the leadership of the private sector, the Planning Unit would be a part of the Executive Office of the President. The Director would be on the White House staff with his small staff on the OMB payroll.

3. To prevent the creativity of this group from being stifled and/or undermined by the bureaucracy, several things can/should be done. The Director of the Planning Office would sit as a member of the White House Secretariat which would provide him/her

access to the decision-making process and also would be a forum for him/her to contribute ideas and to challenge conventional thinking on policies and programs. Also, the Director of the Planning Office would file brief weekly reports with the President, would be allowed to comment on policy memorandum and have general access to the President. Having said these things, a word of caution is important. The head of the Planning Office should have one foot inside of government and one foot outside. To the extent this person begins to function more and more as a member of the White House staff or becomes increasingly a bureaucrat, his/her worth as a free thinker and innovator will be considerably compromised.

4. While it would be a part of the government and the EOP, the principle function of this unit would be to think, to listen and to search for new ideas and concepts. Its purpose would not be to consider ideas in the context of budget restraints or political limitations, but it should be a place where new ideas are received and seriously evaluated.

5. The head of this planning unit should be a person with great experience, a general background and a probing mind. He/she should be confident enough and strong enough not to be intimidated by persons on the White House staff. At the same time, this person should have sufficient public statue that he/she can deal easily with and draw on the many resources of the private sector.

6. The head of the planning unit will monitor the "Goals Program" on behalf of the President, will provide staff support for that effort and will personally receive and evaluate their various reports, recommendations and specific ideas.

I have tried in the following graph to summarize both the purpose and structure of the Planning Unit and its relationship to the government and the private sector:

PERSONNEL EVALUATION AND CHANGES

Introduction

In this section, I will attempt to describe the process that I will follow in the review of White House personnel. While it will begin immediately, it is important that it be perceived in several ways:

- That it be businesslike in every way
- That decisions to dismiss persons and/or to transfer them to other jobs in government be handled in a way sensitive to people's feelings
- That it be perceived as being fair and not directed at persons for any reasons other than incompetence and disloyalty
- That while it is and should be a methodical process, it should not drag out so long as to sustain apprehension among the staff at a level where performance and morale suffer

- That we not replace the people we dismiss with persons who are only mediocre
- That affirmative action be a legitimate consideration in these decisions

Process

After you formally designate me as Chief-of-Staff and give me the responsibility for running the staff, I will prepare a talk for the senior staff that outlines for them my concept of these new responsibilities and what I expect of each of them.

I will tell them that I want them to take a fresh look at their own staffs and at every major position in the White House. For that purpose, I have developed an evaluation form which will be given to each member of the senior staff. I will expect them to fill out and return to me in a week their frank analysis of every person on their staff who makes more than \$25,000. per year. I will expect the senior staff to do these evaluations personally, and on large staffs it will

be necessary and appropriate for the deputies to assist as the senior staff member may not have a first hand knowledge of all of their **employees**.

I will promise the senior staff that no one but me will see these forms to insure frankness in evaluation. Due to the structure and thrust of the form, (which you will find attached) it should force the senior staff members to assess and recognize some of their weaknesses. Where people are rated low on any of several key criteria, I will simply insist that they be dismissed. I do not expect the senior staff to evaluate harshly many of the people who should be replaced, but this initial exercise might help me to identify some weak second and third level people that I would not have identified, and hopefully it will create the atmosphere that this review is being conducted in a fair and businesslike manner.

Once these forms have been returned, I will study them carefully, talk with persons on the staff who have to work with some of those persons who are marginal cases and make my tentative decisions. I will

Office _____

Rater _____

COMPARATIVE RATING

All of the staff members in your office, who make \$25,000 or more, are listed on the attached page(s) in alphabetical order. (If anyone in this category has been left out, please add that person(s) at the bottom.)

In Column I please rank them in order of their effectiveness 1 - _____.

In Column II please answer the following question about each person:

"Knowing this person as you do now, if starting your office over, would you hire this person for the position he/she now holds?"

In Column III, if you answer "No" or "?" in Column II, please answer the following question:

"Would you hire the person for some other position?"

Page _ of _

COMPARATIVE RATING

[illegible]

Office: _____
Name of Rater: _____

STAFF EVALUATION

Please answer each of the following questions about this person.

Name: _____
Salary: _____
Position: _____

Duties: _____

Work Habits

1) On the average when does this person:
arrive at work _____
leave work _____

2) Pace of Work:
1 2 3 4 5 6
slow fast

3) Level of Effort:
1 2 3 4 5 6
below full
capacity capacity

4) Quality of Work:
1 2 3 4 5 6
poor good

5) What is he/she best at? (rank 1-5)
____ Conceptualizing
____ Planning
____ Implementing
____ Attending to detail
____ Controlling quality

6) Does this person have the skills to do
the job he/she was hired to do?
yes _____
no _____
? _____

7) Would the slot filled by this person be
better filled by someone else?
yes _____
no _____
? _____

Personal Characteristics:

8) How confident is this person? (circle one)
x x x x x x x
self confident cocky
doubting

9) How confident are you of this person's
judgement?
1 2 3 4 5 6
not very
confident confident

10) How mature is this person?
1 2 3 4 5 6
immature mature

11) How flexible is this person?
1 2 3 4 5 6
rigid flexible

12) How stable is this person?
1 2 3 4 5 6
irratic steady

13) How frequently does this person come up
with new ideas?
1 2 3 4 5 6
seldom often

14) How open is this person to new ideas?
1 2 3 4 5 6
closed open

15) How bright is this person?
1 2 3 4 5 6
average very bright

16) What are this person's special talents?
1) _____
2) _____
3) _____

17) What is this person's range of information?
1 2 3 4 5 6
narrow broad

(over)

MY NEW ROLE AS CHIEF OF STAFF

In focusing both of us on the selection of my deputy, Mr. Kirbo put his finger on the basic question, which is how could I hope to rise above my friends and peers on the senior staff, bring some discipline and accountability to the White House operation and orient my own time and efforts toward my strengths without having someone work for me who has the talent, the experience and the stature to operate at least as a peer with Stu, Jody and the others. Without having a strong person to support me, these new responsibilities will simply drag me into all of the things that I do not do well and take me away from the things that I do best.

As Mr. Kirbo and I talked through the week about this and I had time to reflect on it, it became even clearer

in my own mind what my role should be, what type person I should recruit to assist me and the status that the person must have to be willing to come, and once here, to be effective.

Like everyone else, I do some things well and some things poorly. One thing I do fairly well is have a fairly objective understanding of my own strengths and weaknesses. In looking for someone to come in to help me, a review of these qualities is helpful.

1. I am a good planner. I have the ability to understand a complicated problem or challenge, break it down into its component parts and provide a general strategy for reaching a specific goal.
2. I am a good political adviser for you.
3. I am a leader. I work well with people and am able to bring diverse people and viewpoints together.

4. I understand you, your strengths and weaknesses,
and the current problems that exist; more importantly,
I understand and can see clearly now what has to be
done.

5. I am a good judge of people.

6. When given responsibility and authority, I am not
reluctant to use it.

On the negative side:

1. I do not like and am not good at details. I focus
on the big picture at the expense of details.

2. I am not a good administrator. I can and have
managed large undertakings (such as the campaign), but
I am not a good person to manage or administer the
details of a process.

3. Some say that I am not tough. I will certainly
have to be a much different and much tougher person

in this new role. However, if you look at the personnel changes that we have made to date ([REDACTED]

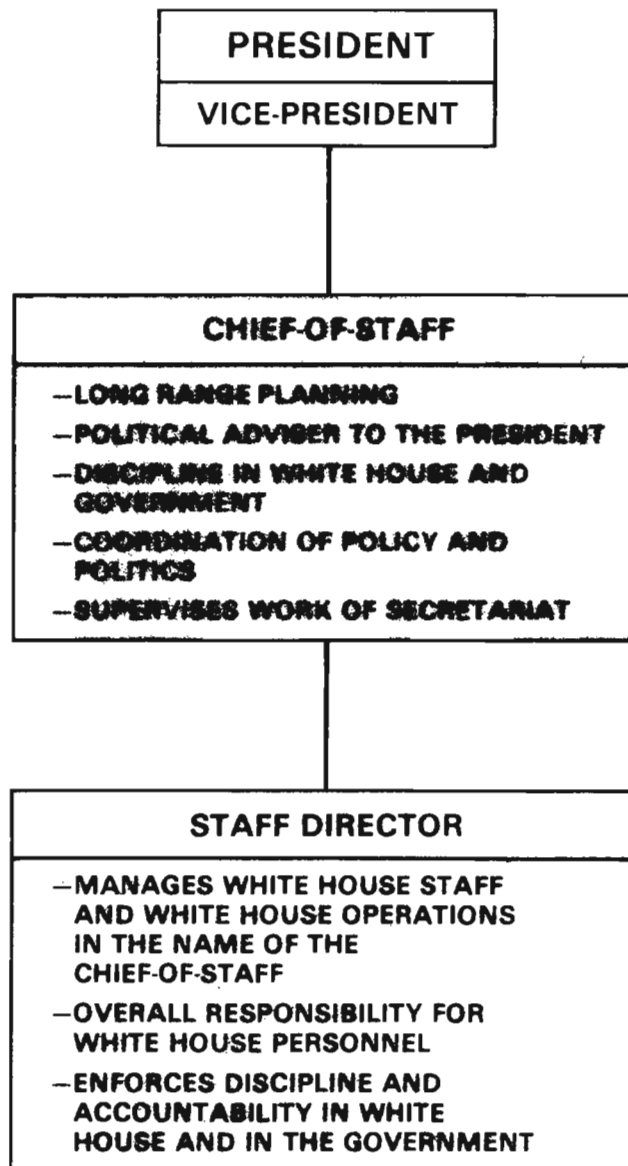
[REDACTED] so forth), I have had to handle all of these myself. I do not enjoy it, but realize that this has to be done much more vigorously in the future. Emotionally and politically, I am tough, but I am not a confrontational type person who draws the line and tries to dominate every person and every situation. My approach is more positive and, in the long run, more effective. I am still lacking that "staff sergeant" quality that would be an asset in a Chief-of-Staff.

4. I am perceived widely as being a "unsubstantial" person. Of the negatives, this may be the most important one, but fortunately is a perception that is not fair and can be changed. More on this later in this section.

Unfortunately, some of the qualities that I lack are essential to being an effective Chief-of-Staff and having a smooth-running White House. Consequently, I must find a very strong and experienced person who compliments me and at least does all the things well that I do poorly.

You and Mr. Kirbo talked about this person being a peer of Stu's and Jody's. Upon reflection this person needs to have line authority over them on matters of personnel, accountability and operations. I do not believe that we will get the kind of person that we will need by simply offering him/her a position as my deputy. Instead, I would envision designating this person as "Staff Director" and having our duties and responsibilities defined as in the following chart:

**JOB DESCRIPTION AND ORGANIZATION: CHIEF-OF-STAFF
AND STAFF DIRECTOR**



If we are able to recruit such a person (and it may be necessary to get you involved in this), I would expect this person to have a positive effect on me in many ways and ultimately would crowd me a little. I will not be threatened by such a person, but will welcome him/her as someone who will allow me to spend my time and thoughts on those things I do best.

Although I am anxious to get this person aboard at the earliest possible date, I cannot afford to wait to begin to make the changes that are badly needed, both in terms of personnel and process. And although I do not plan to be bogged down in personnel matters six months from now, it is important that I begin these other changes now for the following reasons:

1. It may take several weeks to identify and have on board the right deputy. Even if that person were here today, they would not have the immediate clout or knowledge to begin making these changes.

2. I have a clear sense of what you what done and what must be done. Consequently, I do not need this new person on board to begin this process.
3. In forcing these changes of process and personnel on the staff, I will be accomplishing two things that are very important for my own effectiveness: I will be domonstrating that I mean business and I will be separating them from the notion that I am their peer and that our relationship remains the same.

In summary, I want you to know that I am working to get in the right kind of person to assist me and you, and hope to identify and finally recruit him/her as soon as possible, but for the other reasons presented here, I must begin immediately to supervise and execute this effort to replace people on the White House staff and to make improvements in some of our processes.

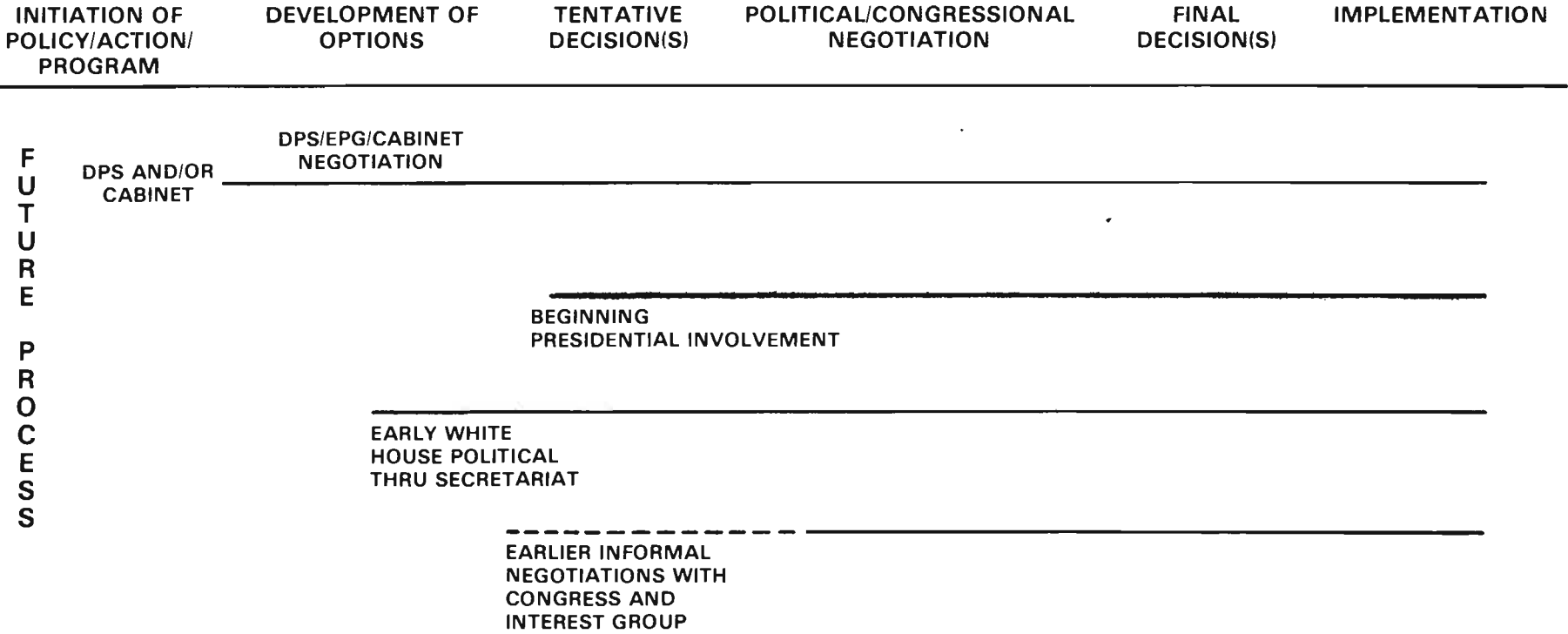
My Own "Image"

Over the past ten days, most of our advice and criticism has been directed at you in terms of the changes that you will have to make in your own attitude and approach to your work.

For me to be successful as your Chief-of-Staff, I will have to make changes in my own attitude and approach to my work that are at least as great as those you will have to make. I have several problems.

First, and you put it best, an appearance of "unsubstantiality". Because I work internally and quietly and have little to do with the media, the good work that I do for you is known to only a few people. The perception of me publicly and in the political community is one of a person who helped Carter get elected, who is in over his head in the White House.

DOMESTIC POLICY DECISION-MAKING PROCESS



Secondly, in the political community, I am perceived - and it is not entirely true - as someone who never listens or consults with the right persons. As a result, I am not in a position to provide the President with different thoughts and a broader perspective.

Thirdly, I embody a lot of the criticisms that people direct at you and your staff: that we are all from Georgia, that we don't go out socially enough, that we have disdain for the Congress, so forth and so on.

I would acknowledge that this criticism of me particularly is valid, and that it will be critical to my success in this new position for me to be perceived in a different way. There are several things that I intend to do:

1. Be perceived as listening to the right people.

I will begin immediately to meet with substantial people in and out of government.

2. Make a special effort to build some key relationships with the Congress. I will do this in coordination with Frank Moore, but I plan to bring two or three member of Congress to the White House each week for breakfast or lunch and to also pay some courtesy calls to the Hill on a regular basis.

3. In a lot of other ways - some subtle and some not - I will act and behave in a manner that counters this perception that I am not a "substantial" person. Mr. Kirbo said that I should start acting like "the big man that I will be". I have always held back and had disdain for protocol and appearance. But in keeping with this change in perception that is necessary for me, I intend to follow Mr. Kirbo's good advice.

None of these changes will be particularly pleasant or easy for me, but I recognize them as being critical to my success, and I plan to make them.

My Relationship With You

In the past in many instances, I think that you have viewed me as the leader of a band of conspirators who are always trying to get you to do things that you don't want to do. And while your perception of me in this regard is greatly exaggerated in your own mind, it is true that I am used by various people on the White House staff as a rallying point for those who are concerned with or unhappy with a pending decision. If Zbig loses out on a foreign policy matter or if Stu or the Vice-President lose out on a domestic issue, I am almost always sought out as an ally or the person to go to you and ask for an appeal to that decision. In the past, I have listened and sometimes agreed, but have very seldom gone directly to you on their behalf.

In my new posture, I believe things can be different and better. I want and expect to be able to frankly

state my views to you, but I recognize that I am going to have to be much, much more of a defender of you and the action/decision that you have already made.

To accomplish this, I will need several things:

- When you make a tough and controversial decision that will upset some members of the staff, you must share it with me and explain your thinking and rationale. I will then be armed with the information that I need to keep them away from you.
- I need to and will begin to sit in on more meetings that you have so that I can stay generally current on all topics.
- Under the new structure, I will not have the luxury of not understanding in a general way our policy on any subject.

I believe that I can prevent you from wasting much of your valuable time if I can stop three out of four appeals to you on a decision. Possibly every fourth time I will agree with the complaint and will bring it to you, but only after I have reviewed the record of what has transpired, understand the problem and am prepared to come to you with either additional

information or considerations that you have not had
that make an appeal and review worth your valuable
time and attention.

LEADING THE COUNTRY

Introduction

The acknowledged goal is for you to make an easy, obvious and successful transition from being the manager of the government to the leader of the people. We deal in the first major section with the first challenge: that President Carter is taking a new approach to his Presidency and has really taken charge in Washington.

In this section, I deal with the second - and equally critical - component: the need for you to be perceived as moving out of the engine room and moving up on the deck to guide the ship of state. This is

an area where we need to continue to be creative and non-conventional in our thinking and actions. The tangible and substantive things that we need to do were outlined in the previous section and are fairly obvious. These things are more subtle and will require our collective thoughts and the ideas of persons from the outside.

In this regard, I have attempted in this section to analyze the following:

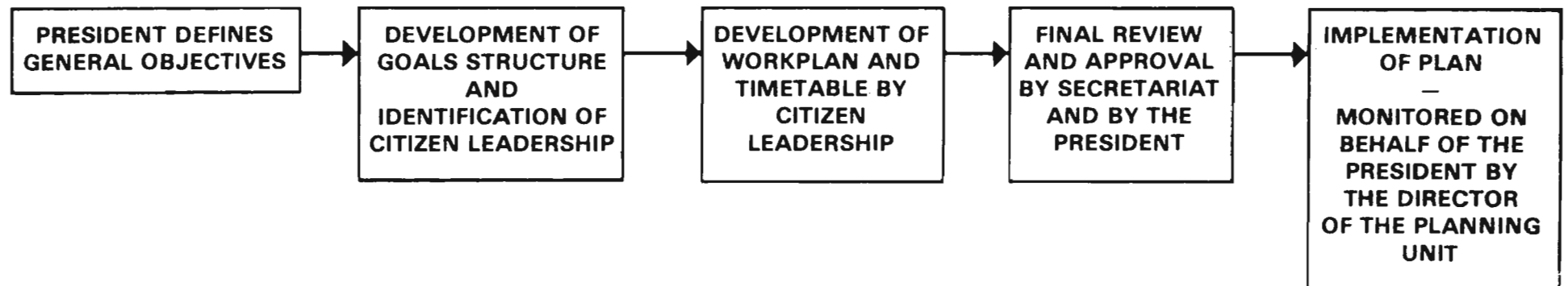
- The "Goals for America" Program
- The Use of Real Change(s) for Symbolic Value
- The Rationale for Changes in Your Schedule

GOALS FOR AMERICA PROGRAM

One of the specific suggestions that you responded to was that we develop a "Goals for America Program" to provide citizen participation and involvement in defining our nation's goals for the future and also as a mechanism for providing you and others in government fresh ideas and concepts.

The following chart describes the process that we should follow in defining the nature, scope and purpose of the "Goals" program:

PROCESS TO DEVELOP/DEFINE GOALS PROGRAM



I do have several concerns about the "Goals Program" that I would like to share with you:

1. We should have strong leadership for this program.

The people that are selected for leadership positions should be loyal to you and manage the activities of these various groups in a way that is not an embarrassment to you.

2. You should be minimally involved in the program.

You should announce and launch the program in a way that indicates your continuing interest and support, but the premise for the effort should not be that you are going to be willing to devote a large amount of time to this effort. This should be made clear to all of those involved.

3. We will have to be very careful that this program is handled in a way that does not make us vulnerable to criticism that the "Goals Program" is not an exten-

sion of the Carter-Mondale re-election effort. Also, it could undermine the campaign effort to have our friends and supporters immersed in the "Goals Program" instead of our campaign effort. One way to avoid partisan criticism would be to ask a man like John Gardner to head it up.

4. We must not let a program like this become the captive of the special interests groups who will want the goals defined in a way that is compatible with their own interests. We saw this happen in Georgia where the people who were involved were - for the most part - the elite who had some interest or program to protect. A strong emphasis must be placed on involving average citizens. I would think that you could do a couple of "Goals Programs" in the same way that you would conduct a townhall meeting.

5. We should establish a reasonable program with realistic objectives and a politically comfortable timetable. It would be bad, for example, for our own

"Goals Program" to make a recommendation on a major domestic issue in the middle of the primary campaign that either reflected poorly on our own performance and policy or that we could not accept.

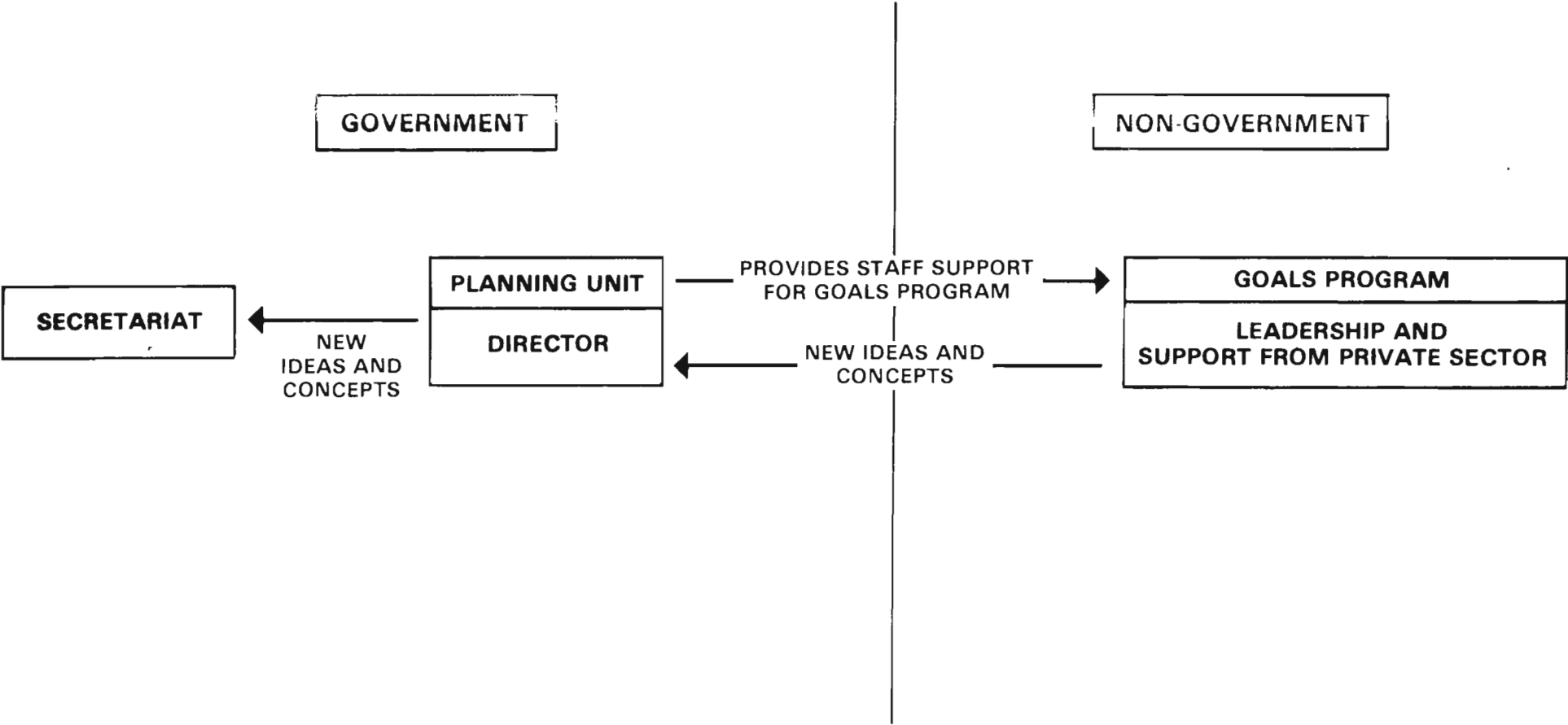
6. There should be two major focuses: energy and everything else. This would require three key persons: someone from the private sector to run the entire program, someone with an energy interest/background to run the energy component and someone with a very broad background and experience to run the "umbrella" group which would attempt to define and reconcile the various domestic goals of our country.

The following chart outlines the structure and purpose of the "Goals Program" and reflects my elaboration of the general points that you made to me:

Once the "Goals Program" is organized, it is important that it have the staff support that it need while maintaining its heavy dependence on people and resources from the private sector.

There also needs to be a simple but effective mechanism for the "Goals Program" to provide the President and the government new ideas and concepts about the problems which face our country. It would be my recommendation that the Director of the new White House Planning Office be the official liaison with the "Goals Program" leadership. He will provide staff support and monitor the activities of the program to insure that it is on track and serving its intended purpose. He/she will also receive the formal ideas and recommendations from the program leadership and pass those on to the Secretariat and President that are particularly worthy of further study and consideration. These relationships are presented in the following chart:

RELATIONSHIP OF SECRETARIAT, PLANNING UNIT AND GOALS PROGRAM



To recap, the "Goals Program" can be helpful to the President and the country if:

- It is led by strong people
- It establishes realistic goals and timetables
- It is perceived as non-partisan
- It is not captured by the elite and special interests
- An effective mechanism exists for channeling their recommendations, ideas and concepts.

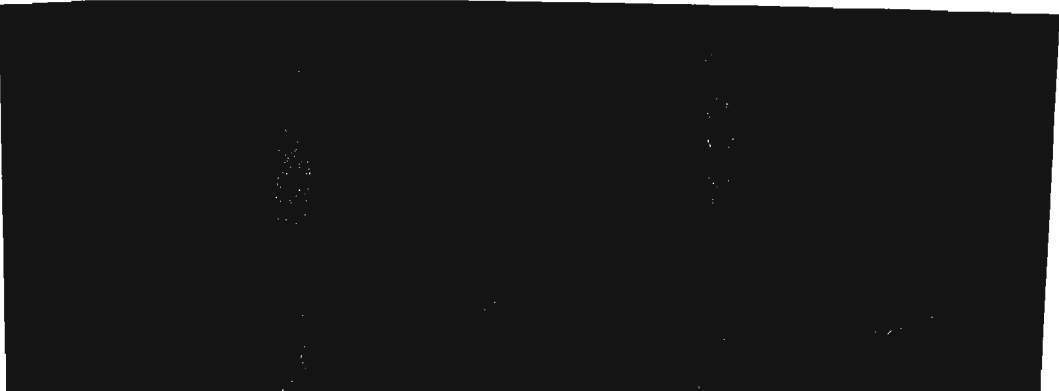
BRINGING IN NEW PEOPLE

I believe that the press, the political community and the American people are looking for two signs that this change in attitude is real.

First, as an indication that the President is getting tough, the dismissal of incompetent and disloyal people as a sign that there will be discipline and accountability in the Carter White House.

Secondly, as an indication that the President and the people around him are ready to acknowledge that they lack the broad experience and diverse points of view they need to lead this country, the bringing in of persons who are widely perceived as having the experience and knowledge that we need.

We will need to think and reflect on this for a few days, but let me present you some tentative thoughts.



Secondly, Rafshoon plans to leave in late August. A person like Hedley Donovan might come in with the general responsibility to serve as a communications adviser to work with the "media elites", the heavy columnists and others. This would compliment Jody's work and style, and would be a great help.

Thirdly, if we proceed with the creation of the planning unit, that would be another place where we could use such a person. I would argue strongly that one of these three positions should be occupied by a woman as the addition of three men would skew our affirmative action

balance in the White House in an unsatisfactory way.

We need to reflect on these possibilities and make them a part of our larger plan and schedule.

THE NEED FOR CABINET CHANGES

We have talked about this so much that I feel that we have almost been counterproductive in making our point. Some of us have been so strong and personal in our attacks on members of your Cabinet that it has trivialized the entire discussion.

Two points are important for you to remember.

First, six weeks from now, the skeptics in the media and the political community of this country will measure the degree of change and "toughness" by your actions against the Cabinet. The Cabinet changes are the "litmus test" for most of the persons who will be interpreting your actions to the American people.

Second, we should not apply a double standard to the Cabinet secretaries when we will be making some very un-

pleasant changes here at the White House. We will be getting rid of people here who helped us early in the campaign and who are disloyal and/or incompetent. The same criteria should be applied to the Cabinet.

then begin to meet privately with members of the senior staff and outline to them the changes that must be made. I cannot allow each of these meetings to evolve into a series of meetings and negotiations between myself and the senior staff members. I will listen to their arguments, but my intention is to be fairly rigid in insisting on changes. I may make some mistakes, but there is a broad consensus in the White House about who is weak and/or disloyal. I may make a few mistakes, but the overall need for the changes will far offset the few mistakes that I might make.

For the people who have been loyal and/or helped in the campaign and are simply in jobs over their heads, we will try (but not promise) to find them other jobs. For persons that we suspect of disloyalty or who are incompetent, we will simply give them several weeks notice that they will be terminated. We will try to be fair and flexible, but it makes no sense to let

this entire process drag out too long. I can keep you generally informed (and will on a few major changes), but I feel strongly that you should stay aloof of this process. Let people blame their problems on me and not on you. If you don't stay aloof of this process and members of the staff believe that they can reverse my decisions by going directly to you, it will involve you in a way that you cannot win and will erode my own authority.

We want to avoid a "Saturday night massacre" appearance that we are doing this for media impact. Instead, these changes will take place over the next two or three weeks, but I do not want it to drag on for too long as there will be a lot of unease and apprehension throughout the White House. We need to make the changes, bring on new people and get on with our jobs.

Leaks

There is a broad consensus among the senior staff as to who does most of the leaking although it is always impossible to prove it. As we make these personnel changes, it is my intention to include those persons that are widely suspected of leaking and/or having excessive contact with the media. If we dismiss the ten or twelve persons most widely suspected of leaking, it should discourage others from doing so. Of course, out of the group of ten or twelve, I might very well be wrong on a couple of these people. This will simply have to be the price that we pay. I don't think we will be far wrong on any of the persons that I am considering.

The real problem will come as a few of these persons are generally competent and effective in their work. I will simply have to insist on their departure as I cannot be put in the posture of accusing them of

something that I cannot prove.

Jody has been considering the idea of requiring all press contacts with the staff to be reported to his office. I fear that this probably would not work as the "non-leakers" would be true to such a system and the "leakers" would not.

I believe that the sudden dismissal of a number of persons known to have press contacts and big mouths would have a much more sobering effect on the White House staff.

THE USE OF REAL CHANGE(S) FOR SYMBOLIC VALUE

In terms of effecting this transition and making it creditable in the minds of the American people, the media and the political community, we have to do several things.

First, identify the real changes that are necessary to make this transformation a reality.

Secondly, effect those changes.

And thirdly, present them to the American people as evidence of a revitalized and changed President.

I have attempted in the following chart to isolate those perceptions that are widespread and negative about your Presidency and relate them to the actions

that must be taken for the elites, the political community, the media and the American people to believe that this is all real.

That chart follows:

Negative Perceptions
About Your Presidency

Actions Required To
Change Perceptions

Desired Perception

- | | | |
|---|---|--|
| 1. "Carter is not in charge of his government" | -White House shake-up/firings
-Strong steps taken to insure discipline and accountability | "Carter is cracking down" |
| 2. "Carter is not tough" | -Cabinet firings | "Carter is getting tough and is getting a grip on his government" |
| 3. "Carter is managing, not leading" | -Symbolic changes* in his approach | "Carter is starting to provide leadership" |
| 4. "Carter has forgotten who elected him and has lost touch with the average people" | -Changes in schedule to allow more travel and time away from his desk
-More town meetings, etc. | "Carter is getting back in touch with the people" |
| 5. "Carter listen to a small group of Georgians and does not reach out for advice and different opinions" | -Bring in some new people to the White House
-Schedule regular time for President with outside people and groups | "Carter is finally expanding his circle of advisers and listening to different points of view" |

*Symbolic changes enumerated elsewhere

Rationale for Schedule Changes

It will be difficult to convince anyone that you are taking a different approach to your Presidency if you are perceived as spending your time - our most valuable resource - in the same way that it has been spent over the past two and one-half years. Also, in terms of making this substantial transformation from manager to leader, it will require that you spend less time with the business of government and more time thinking, reflecting, seeing different people and spending more time as a "teaching President".

I asked Phil Wise to prepare for me a profile of those scheduled appointments that are considered "givens" on a daily, weekly and monthly basis. That profile follows:

REVIEW OF PRESIDENTIAL TIME COMMITMENTS

	Time Alloted (Does not include preparation time)	Monthly (22 days)
<u>Daily</u>		
Dr. Brzezinski	30 minutes	11 hours
Jordan, Vice-President, Moore and Eizenstat	30 minutes	11 hours
<u>Weekly</u>		
Jim McIntyre	20 minutes	1½ hours
Charlie Schultze	20 minutes	1½ hours
Intelligence Briefing	30 minutes	2 hours
Vice-President/Lunch	60 minutes	4 hours
Rosalynn Carter/Lunch	60 minutes	4 hours
Economic Breakfast	60 minutes	4 hours
Foreign Policy Breakfast	60 minutes	4 hours
Proposed Califano, Harris and Marshall Breakfast	60 minutes	4 hours
Political lunch and dinner on alternating weeks	150 minutes	2½ hours
<u>Bi-Monthly</u>		
Congressional Leadership Breakfast	90 minutes	3 hours
Editors' Briefings	30 minutes	1 hour
News Conference	240 minutes	-includes preparation time 8 hours
Cabinet Meetings	120 minutes	4 hours
<u>Monthly</u>		
John White, Chairman DNC	20 minutes	1/3 hour
		<u>65.8 hours</u>

Analysis of Present Schedule Profile

Phil Wise reports that he blocks out four weeks each months with fifty-five working hours available each week. Under his formula, he never schedules you for more than half of that time so there will be time for preparation, reading, telephone calls, emergency meetings, etc.

In other words, out of the 220 working hours per month that are set aside by the Scheduling Office, no more than 120 hours is committed in advance. According to the profile just reviewed, 65.8 hours are automatically committed to various groups and persons. I would suggest strongly that unless your schedule and these committments are revised substantially, the transition that you need to make and want to make is impossible.

Suggestions

1. The Brzezinski intelligence briefing every morning is necessary and should continue.
2. I believe that the group session with the Vice-President, Frank, Jody, Stu and myself is helpful and should be continued. I plan to tighten up on these meetings in the future.
3. I believe that McIntyre's weekly meeting with you can take place every other week. If you accept other suggestions I make, you will see Jim as much as you need to. I asked Jim how he felt about such a change, and he was agreeable to it.
4. I believe that you should meet with Charlie Schultze every other week. He sees you often during the week and sends you paper whenever necessary.
5. Stan Turner's Intelligence briefing should take place every other week. You receive intelligence reports from Stan every morning, and the weekly meeting is not necessary. Only about every third such briefing is really relevant and worth your valuable time.
6. Your luncheons with the Vice-President are very important to him and very helpful and enjoyable for you. I would like to recommend that every fourth lunch be expanded to include the senior staff.
7. Rosalynn spends more time with you than anyone. I know that she uses her luncheon to deal with you on government matters that she doesn't want to bother you with at home, but it seems that these luncheons might take place every other week - a suicidal suggestion on my part.

8. At present, you meet with the inflation group for breakfast every week, and we have tentatively approved a breakfast every week with Califano, Harris and Marshall. I would suggest that you have a single Domestic Policy Breakfast every week and let the focus of that meeting and the participants vary from week to week. You might have your economic group in one week, Energy and Agriculture to talk about the problems of the farmers the next and Transportation and other agencies to talk about their problems. My suggestion would be that you have a single Domestic Policy Breakfast each week, let Stu and Jack determine the relevant topic and participants, and let you approve in advance of it being scheduled.

9. Although we were just getting started with them when you left for your consecutive trips, the political dinners and lunches that we have scheduled on alternating weeks are a good use of your time. Out of that single dinner with Lane Kirkland grew a new and better attitude on the part of the AFL-CIO toward you and your programs and an enthusiastic endorsement on the part of Mayor Koch.

10. I recommend the continuation of the Congressional Leadership Breakfasts and the Editors' Briefings.

11. Regularly scheduled news conferences should not continued and be replaced by more townhall meetings and similar forums.

12. Regular Cabinet meetings should not be held. They should be called when the President has something to say to them. For the purpose of general morale, the Cabinet should be called together every four or five weeks if they have not had occasion to be together otherwise.

REVIEW OF PRESIDENTIAL TIME COMMITMENTS WITH CHANGES

	Time Allotted (Does not include preparation time)	Monthly (22 days)
<u>Daily</u>		
Dr. Brzezinski	30 minutes	11 hours
Jordan, Moore, Powell, Eizenstat and Vice-President	30 minutes	11 hours
<u>Weekly</u>		
Vice-President Lunch (3 per month)	60 minutes	3 hours
Domestic Policy Breakfast	60 minutes	4 hours
Foreign Policy Breakfast	90 minutes	6 hours
<u>Bi-Monthly</u>		
Congressional Leadership Breakfast	90 minutes	3 hours
Editors Seminar	30 minutes	1 hour
Jim McIntyre	30 minutes	1 hour
Charlie Schultze	30 minutes	1 hour
Intelligence Briefing	30 minutes	1 hour
Rosalynn Carter Lunch	60 minutes	2 hours
<u>Monthly</u>		
Chairman John White	30 minutes	1 hour
Senior Staff Lunch	60 minutes	1 hour
		46 hours

Summary

Your present obligated time amounts to 65.8 hours or 55% of your total scheduled time. Under the revisions that I propose, your total scheduled time per month would be 46 hours or 38% of your scheduled time.

We will use this time for you to travel more, listen to people more and for you to have additional time to think and reflect. Your agreement to the thrust of these changes is critical in two senses.

First, it is necessary to have this additional time for you to make the real change in your Presidency that you are committed to make. Secondly, it will be an important symbol that you are changing your approach to the President and are less and less the manager and more and more the leader.

In scheduling for you for the future weeks and months, I have devised a form which I hope will help us to do several things:

First, plan in advance what we want to accomplish in terms of your perception by the American people, and then build back from there to insure that you take the right actions in any given week to insure that you are perceived that way.

Secondly, we should not overexpose you. The summit and the two speeches back to back has given you sufficient exposure. For the balance of this week, the American people should read and hear about your actions following up on your speech.

Thirdly, to be sure that we are faithful to the concept and the premises agreed upon at Camp David, I have constructed in the chart our two objectives: to take

charge of the government and to lead the country.

Your schedule must reflect both objectives on a continuing basis.

The following chart reflects this approach for this week.*

*We will have a schedule for you Tuesday morning for the balance of this current week reflecting this approach.

CALENDAR/SCHEDULE

THEME OBJECTIVES: CARTER TAKES CHARGE OF GOVERNMENT
CARTER BEGINS TO LEAD COUNTRY

	S	M	T	W	T	F	S
CARTER TAKES CHARGE OF GOVERNMENT	Speech	Energy Speech	Meets with staff and Cabinet				
CARTER BEGINS TO LEAD COUNTRY	Speech	"	"	Something non-substantive on Wed. or Thurs./to be determined			
PERCEPTION GOALS	Carter is making a comeback		Carter is getting tough and making changes				
PRESIDENTIAL VISIBILITY - EXPOSURE	High	High	Low	Low	Low	Low	

SOME MISCELLANEOUS THOUGHTS

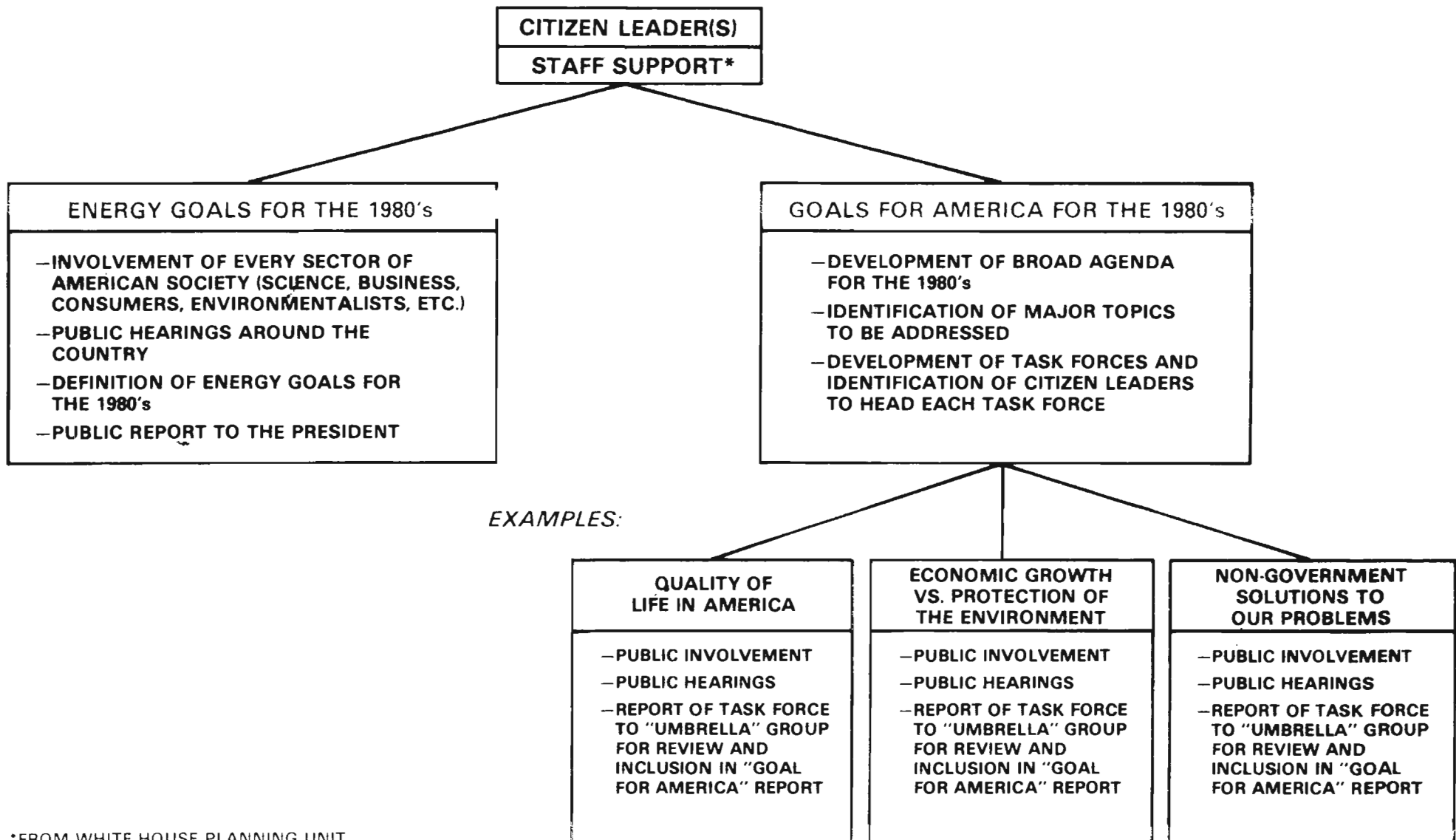
1. Having been highly visible for the last forty-eight hours and with subsequent analysis and news coverage certain to carry into the weekend, I would strongly recommend that you keep a low public profile for the rest of this week.

2. Now that you have "come down from the mountain" and have set the stage for your Presidency being viewed in a different context, it is time for us to begin to act. We do not need to move too fast nor to try to do everything in the first week or ten days. But there needs to be good execution and consistency of action. Jerry and Jody need to develop a plan (which I will be responsible for) to see that these actions are presented in a positive way that is compatible with our objectives.

3. I don't want to rush or crowd you in any way, but to integrate these potential actions into our overall plan, I need to have some sense of your thinking and timing.

4. Finally, while we all agree that you need to get out from behind your desk and out among the people more, I believe that it is now important that you spend the next ten days or so in Washington acting on your promises and being perceived as changing your Presidency. Having been out of the country for most of June and at Camp David for most of July, you need to be perceived as being back at the White House making all of these things happen.

GOALS FOR AMERICA/STRUCTURE AND PURPOSE



*FROM WHITE HOUSE PLANNING UNIT

Review of Recommendations

I hope that you will provide me your reactions and comments on these various recommendations. I do not want nor need detailed reactions, but do need to know if the thrust of these recommendations is compatible with your own feelings and thoughts.

1. Do you agree to the concept of an executive committee of senior staff members and others (referred to as the "secretariat" in my memo) who will provide early political input into the decision-making process, new ideas and also be responsible for setting timetables, developing political workplans, establishing task forces, etc.?

☒ I agree.

☐ I disagree.

☐ Other

2. Do you agree with the general structure and purpose of the White House Planning Office as outlined in my memo? Also, do you think that the relationships between that office, the government and the private sector is adequate?

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☒ I agree generally.
☐ I disagree.
☐ Other

*Let Planning
officer have input*

3. Do you agree with the need for the evaluation of White House staff persons and the general approach that I have outlined?

☒ I agree generally.
☐ I disagree.
☐ Other

4. Do you agree that for reasons of substance and appearance that we need to bring in some new persons to the White House? And if so, are you agreeable for me to begin quietly to make that search?

☒ I agree and want you to proceed on possibilities.
☐ I disagree.
☐ Other

5. Are you agreeable to the general notion of my being a strong chief-of-staff and the need for me to bring in a "staff director" to assist me?

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☒ I agree generally.

☐ I disagree.

☐ Other

6. Does the "Goals for America" Program that I outlined seem to be structured and focused in a satisfactory way, and do you agree that we need to find strong citizen leadership?

☒ I agree.

☐ I disagree.

☐ Other

7. Do you agree that we need to take advantage of the real changes that we intend to make for the purpose of symbolic value?

☒ I agree.

☐ I disagree.

☐ Other

8. Do you agree with the thrust of the schedule changes that I recommended to you?

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I agree. ☒
I disagree. ☐
Other ☐

P

Implementation Process

The following steps presume general agreement with the recommendations presented to you. I would like to establish task forces, assignments and deadlines so that we can be involving a lot of persons inside and outside of government making to make these various objectives an early reality.

1. As a first step, you need to share with the White House Senior Staff your thoughts and feelings and announce to them my immediate appointment as Chief-of-Staff so that I can begin to function in that capacity. We have a senior staff meeting scheduled Tuesday morning for that purpose. Talking points for that meeting will be on your desk.

2. You also need to meet with the Cabinet alone and let them know that you intend to do business differently in the future. Also, you need to define for them my

new responsibilities which can be summarized by your saying that in the future I will have the authority to speak for you, and that when I make a request of them, it should be treated the same as a request from you. If they think it is unreasonable, it can be appealed to you.

Also, I think that we need to have the Cabinet "on board" in terms of understanding this new approach to government. You might spend some time reflecting on the Camp David experience with them.

3. Once steps 1 and 2 have been completed, I will have the authority that I will need to begin to execute these other things. My present intention is to form a series of task forces to accomplish each objective. For example, I would like for John Gardner to head an informal task force composed of Jim McIntyre, Rosalynn and Pat Caddell to consider the idea of a "Goals Program" and to give me and you a report back in ten days.

4. I'll not bother you now with the listing of other

task forces, but will provide you a general listing in a couple of days. We will keep them small, involve people inside and outside of government and give them a specific task with a quick turn-around time for completion.