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MEMORANDUM

TO: Senior Staff
FR: Marcia Hale
RE: Presidential Scheduling Procedures
DT: February 19, 1993

The attached is a detailed memorandum regarding scheduling procedures and briefing materials for the President. To schedule an event for the President the discussed guidelines must be observed for both the scheduling proposal and the briefing materials. Please call me if you have any questions regarding the procedures memorandum.

Please note that if the proper procedures are not followed an event will not be scheduled.

Thanks

Presidential Scheduling Procedures

All Presidential scheduling requests, including photo opportunities and phone calls, must be coordinated with the Office of Presidential Scheduling. This includes all requests that are within the White House as well as outside.

Schedule Proposals

Schedule proposals should be prepared for all schedule requests. Each such proposal should be prepared, coordinated and forwarded by a senior staff member and sent directly to the Director of Scheduling and Advance, Marcia Hale (Ground Floor - West Wing).

Format: All schedule proposals must follow the format of the attached example.

Deadline: All schedule requests must be submitted in writing to Marcia Hale in the Office of Presidential Scheduling at least one week prior to the proposed event.

Long-Range Scheduling Meetings

Once the Scheduling Office has determined that the proposed event is needed, is presidential in nature, and is congruent with Administration goals or themes, it will then be considered for final approval during the weekly Long-Range Scheduling Meeting which takes place on Friday afternoons. It is during this meeting that various senior staff members provide final input to assure no policy or schedule conflict exists.

Notice of Approval

The Scheduling Office will notify the appropriate office of final approval by way of a memorandum.

Once an event has been confirmed by Marcia, the logistics of the day are managed by the Deputy Scheduling Directors, Stephanie Streett and Anne Walley. Stephanie and Anne rotate days as the attached calendar illustrates. It is imperative that they know of any and all changes that occur in already confirmed events. They are the only ones with the full knowledge of any ramifications caused by changes in the daily schedule.

Notice of Approval (continued)

The Senior Staff member requesting the event will be listed as the contact on the schedule and responsible for coordinating all briefing materials to the Staff Secretary for use by the President. If the Senior Staff member is not personally planning to prepare the briefing it is his/her responsibility to identify a project manager for the event on the schedule proposal.

Exceptions to the Established Procedure

Often the need arises for consideration of a scheduling request immediately. In such a situation, the request should be submitted to Marcia using the standard proposal format. A cover memorandum briefly explaining the urgent need for the event (detailing the reason why the seven day advance request was not possible) should accompany the proposal.

A decision will be made as quickly as possible, the requesting office will be notified soon thereafter.

Daily Scheduling Meeting

The Scheduling Department invites the senior staff to have a representative of their department attend the daily 10:30 am scheduling meeting, OEOB 180. It is necessary that a department representative attend the daily scheduling meeting in order that each department is kept abreast of any scheduled events affecting their department.

Events in the Residence/Grounds

If an event is to be held in the residence or on the grounds, including arrivals and departures, all of the above mentioned scheduling procedures should still be followed. The Scheduling Office will coordinate with the Office of the Social Secretary to determine the availability of the appropriate room(s) and reserve the room(s) once an event is confirmed.

Ann Stock will take the primary responsibility once an event, in the residence or on the grounds, is confirmed by the Scheduling Office. Stephanie and Anne will coordinate with Ann Stock's office and develop the program and details of the event.

Events in the Residence/Grounds

The event requestor is responsible for providing a copy of the guest list, with telephone numbers, to the Scheduling Office and the Office of the Social Secretary as soon as it is compiled. For events with parties larger than ten, it is the responsibility of the Office of the Social Secretary (not the event requestor) to invite the guests, collect RSVPs, compile security clearance information and clear the guests with WAVES.

Other than for the transmittal of the guest list, the event requestor should not contact the Office of the Social Secretary; Stephanie and Anne will be the contact for the event requestor and the liaison to the Office of the Social Secretary.

Advance staff will be provided for events in the residence as needed. However, if the event is open to the press, a press staff person will always be assigned, by the Press Office, to move the pool.

Political Calls for Confirmed Events

Once an event or trip is confirmed, it is the responsibility of the Office of Political Affairs to determine what political calls need to be made. It is also the responsibility of the Office of Political Affairs to coordinate with the appropriate departments to ensure that all the necessary calls are made.

Briefing Materials for the President

The Senior Staff member requesting the event is responsible for the briefing memorandum on the event to be used by the President. The memorandum must be provided to the Staff Secretary by 3:00 pm on the day preceding the event with thirteen copies. The briefings should follow the format of the attached examples.

Talking points should be included, unless the Senior Staff member requesting the event has arranged for a statement or talking points to be provided by the communications department.

Talking points, remarks, statements, etc. must be triple-spaced and in larger type. Talking points, remarks, statements, etc. must be prepared so that paragraphs do not run onto another page; they should not be broken by the end of a page.

Checklist for Presidential Events

- _____ The Presidential Scheduling Office is responsible for all logistical arrangements for any event on the President's schedule. Please coordinate with them from the time your event is approved in order to avoid the need for last-minute modification.
- _____ Stephanie and Anne are responsible for clearing all guests/participants for meetings in the West Wing and Anne Stock is responsible for clearing all guests/participants in the residence and on the grounds for parties larger than ten. Please provide the necessary lists.
- _____ Be sure that the Staff Secretary's Office knows who will be preparing the briefings and/or talking points.
- _____ Prepare and submit briefing paper(s) to the Staff Secretary by 3:00 pm of the preceding day (13 copies).
- _____ Stephanie and Anne will coordinate with the Press/Media Departments regarding coverage. No organization photographer, other than the White House photographer, will be admitted without Stephanie or Anne's knowledge.
- _____ Stephanie and Anne are responsible for coordinating inclement weather sights.
- _____ If guests are planning to bring/present a gift to the President please notify Anne or Stephanie. No one can directly hand a gift to any of the principals without it being x-rayed.
- _____ If name tags, name cards, chairs, notepads, pencils, etc. are needed please indicate on the schedule proposal.
- _____ Seating charts for meetings in the Roosevelt and Cabinet Rooms need to be included with the briefing for the Staff Secretary.
- _____ The Political Affairs Office is responsible for coordinating all political calls.
- _____ Within five (5) days after your event, submit a complete, confirmed list of staff and attenders, identified by title, and actual starting and completion times of event to the President's Diarist, OEOB room 185.

February 1993

Scheduling Desks

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
				Stephanie Streett		
21	22	23 Stephanie Streett	24 Anne Walley	25 Stephanie Streett	26 Anne Walley	27 Stephanie Streett
Anne Walley						

28
Anne Walley

January						
S	M	T	W	T	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

March						
S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

March 1993

Scheduling Desks

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
	1 Stephanie Streett	2 Anne Walley	3 Stephanie Streett	4 Anne Walley	5 Stephanie Streett	6 Anne Walley
7 Stephanie Streett	8 Anne Walley	9 Stephanie Streett	10 Anne Walley	11 Stephanie Streett	12 Anne Walley	13 Stephanie Streett
14 Anne Walley	15 Stephanie Streett	16 Anne Walley	17 Stephanie Streett	18 Anne Walley	19 Stephanie Streett	20 Anne Walley
21 Stephanie Streett	22 Anne Walley	23 Stephanie Streett	24 Anne Walley	25 Stephanie Streett	26 Anne Walley	27 Stephanie Streett
28 Anne Walley	29 Stephanie Streett	30 Anne Walley	31 Stephanie Streett			

February						
S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28						

April						
S	M	T	W	T	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

April 1993

Scheduling Desks

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
				1 Anne Walley	2 Stephanie Streett	3 Anne Walley
4 Stephanie Streett	5 Anne Walley	6 Stephanie Streett	7 Anne Walley	8 Stephanie Streett	9 Anne Walley	10 Stephanie Streett
11 Anne Walley	12 Stephanie Streett	13 Anne Walley	14 Stephanie Streett	15 Anne Walley	16 Stephanie Streett	17 Anne Walley
18 Stephanie Streett	19 Anne Walley	20 Stephanie Streett	21 Anne Walley	22 Stephanie Streett	23 Anne Walley	24 Stephanie Streett
25 Anne Walley	26 Stephanie Streett	27 Anne Walley	28 Stephanie Streett	29 Anne Walley	30 Stephanie Streett	

March

S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

May

S	M	T	W	T	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

Schedule Proposal

date ____/____/____

_____	ACCEPT	_____	REGRET	_____	PENDING
TO:	Marcia L. Hale Assistant to the President and Director of Scheduling and Advance				
FROM:	(Assistant to the President)				
REQUEST:	(Meeting, briefing, speech, reception, drop-by, etc.)				
PURPOSE:	(Reasons why the President should honor the request; what is the desired outcome?)				
BACKGROUND:	(Additional pertinent information)				
PREVIOUS PARTICIPATION:	(The President's previous participation with this organization or individual)				
DATE AND TIME:	(OPEN if no date is given)				
DURATION:	(Time that the President is committed)				
LOCATION:	(Identify the preferred location in case of inclement weather.)				
PARTICIPANTS:	(Attach list if more than five)				
OUTLINE OF EVENTS:	(Including description of the President's participation)				
REMARKS REQUIRED:	(Major speech, talking points, brief remarks, etc. Who will be preparing the remarks and/or briefings?)				
MEDIA COVERAGE:	(Type of media, photo coverage, if any)				
FIRST LADY'S ATTENDANCE:					
VICE PRESIDENT'S ATTENDANCE:					
SECOND LADY'S ATTENDANCE:					
RECOMMENDED BY:					
CONTACT:	(Host Committee Contact Name, Organization and Telephone Number if working with an outside group)				

THE WHITE HOUSE
WASHINGTON

January 25, 1993

MEMO FOR ALL ASSISTANTS

FROM: JOHN D. PODESTA *JDP*
Assistants to the President
and Staff Secretary

SUBJECT: MATERIALS FOR THE PRESIDENT

It would be appreciated if you would have your staff begin using the attached guidelines when preparing materials for the President.

Thank you.

SAMPLE — BRIEFING PAPER
(Format)

THE WHITE HOUSE

WASHINGTON

DATE (centered)

MEETING WITH NAME OF INDIVIDUAL (centered)

DATE:

LOCATION:

TIME:

From: (Name of Senior Staff Person responsible
for meeting and person's signature/initials)

I. PURPOSE

State purpose of meeting. Paper should be written as if you were talking to the President – in 2nd person (i.e. "you will meet with . . .").

II. BACKGROUND

State relevant context in which meeting arises, issues of special concern to parties, as appropriate, previous participation, etc.

III. PARTICIPANTS

List all participants including White House Staff.

IV. PRESS PLAN

Specify press coverage, photo opportunity, no press coverage, etc.

V. SEQUENCE OF EVENTS

Outline meeting agenda and President's role using bullet points.

VI. REMARKS

To be provided by Speechwriters,
Talking points attached, or
None required

Attachment: Talking Points as appropriate

13

(IMPORTANT NOTE: Briefing memoranda (with ~~16~~ copies) must be delivered to the Staff Secretary by 3:00 p.m. the day before the scheduled meeting or event.)

Attachment II
SAMPLE — DECISION MEMO
(Format)

THE WHITE HOUSE

WASHINGTON

DATE (centered)

MEMORANDUM FOR THE PRESIDENT

FROM:

SUBJECT:

- I. ACTION-FORCING EVENT: (The nature of the event requiring or suggesting action - and the degree of flexibility associated with it.)
- II. BACKGROUND/ANALYSIS: (outline history, current status, possible options and impacts - _____ financial, constituent or other public policy considerations.)
- III. RECOMMENDATION: (Indicate single recommendation or list options.)
- IV. DECISION:

_____ Approve _____ Approve as amended _____ Reject _____ No action

NOTE: Where necessary, tabs may be attached to Decision Memoranda. However, as in the case of other written materials directed to the President, brevity is important. Seldom should a Decision Memorandum be longer than one or two pages, and tabs, whenever possible, should be limited to five or fewer.

SAMPLE — SIGNATURE MEMORANDUM
(Format)

THE WHITE HOUSE

WASHINGTON

DATE (centered)

MEMORANDUM FOR THE PRESIDENT

FROM:

SUBJECT:

Example – Forwarded for your approval and signature is a nomination containing the names of 266 officers for promotion and original appointment in the Navy.

This nomination has been staffed by the Secretary of the Navy and approved by the Secretary of Defense.

Recommendation

That you sign the nomination attached at Tab A.

Attachment IV
SAMPLE — INFORMATION MEMO
(Format)

THE WHITE HOUSE

WASHINGTON

DATE (centered)

INFORMATION

MEMORANDUM FOR THE PRESIDENT

FROM:

SUBJECT:

- I. SUMMARY
(Three (3) sentences or less)
- II. DISCUSSION
(Please be concise)

NOTE: Information Memoranda should not raise issues for decision.

Attachment V

TELEPHONE CALL RECOMMENDATION
(Format)

THE WHITE HOUSE

WASHINGTON

DATE (centered)

RECOMMENDED TELEPHONE CALL

TO: Name and telephone number of person you recommend be called with brief identifying information only when you suspect name will be unfamiliar to the President.

DATE: Date and time the President should make the call.

RECOMMENDED BY: Your name and if recommendation has concurrence of another staff member, so state.

PURPOSE: Preferably one sentence; two at most.

BACKGROUND: Whatever background information you feel will be helpful to the President. Usually 3-4 short sentences will suffice to set the stage and give substance to talking points. Also, make sure that no letter has been sent by Correspondence for the same purpose as the call.

TOPICS OF DISCUSSION: 1. (The specific points that you recommend be made during the conversation)

2.

3.

4.

CONTACT PERSON AND
TELEPHONE NUMBER(S):

DATE OF SUBMISSION:

ACTION: _____

TO ALL
STAFF --
SEE KM's note
let's discuss at
Monday's
staff mtg.
-CZ 8/12

THE WHITE HOUSE
WASHINGTON

June 21, 1993

MEMORANDUM FOR ASSISTANTS TO THE PRESIDENT
DEPUTY ASSISTANTS TO THE PRESIDENT
SPECIAL ASSISTANTS TO THE PRESIDENT

FROM: Mack McLarty

SUBJECT: Congressional contacts

In order to better coordinate our substantial business on Capitol Hill, it is necessary for each of you to make certain the White House Congressional Relations office is aware of your contacts with Members of Congress and their staffs. Those contacts may be divided into two essential categories:

1) Legislative - If you are discussing possible or proposed legislation with Capitol Hill -- whether Members or staff -- it is essential that the legislative affairs office have advance word of your effort. This is necessary because you may be unaware of other pending matters that could be affected by your efforts. In those instances in which the Congressional relations staff asks that you not proceed to pursue a specific matter on Capitol Hill it is necessary for you to withhold further activity until the matter can be resolved.

2) Non-Legislative - It is natural in the course of business for many in the White House to have sustained, substantial contact with the Congress. Knowing the nature of those contacts and the information generated by them can be helpful to the President's legislative agenda. Please take a moment to provide the legislative affairs office with quick informal notes about Congressional contacts of interest.

Thank you for cooperating in the President's interest.

To all staff --
Please give me a
list of your such
out-going activities

Katie - I've
been in touch with
these folks over Antarctica:
Bonderff (Studds)
Cannon (Hamilton)
English (Kerry)

David D.

Katie

Copy -- please
coordinate this
of every I need
from other
staff.