

MAGGIE WILLIAMS' FILES

INVENTORY- BOX FIVE

- 1) Presidential Scheduling Procedures
- 2) Camp David Information
- 3) Sculpture Garden Information (letters, memorandums)
- 4) Secret Service Information
- 5) Information on State Visits
- 6) Swearing-In Ceremony Information
- 7) Surrogates File (information on the Automated Intelligence Systems, Inc.)
- 8) Information on Henry Tanner Painting
- 9) "Taxes" Folder
- 10) Teen Pregnancy Articles and Letters

ENCLOSURES FILED OVERSIZE ATTACHED TO IS 10815

NAAA 8156

Paul 6297
Matt
Barry

THE WHITE HOUSE
WASHINGTON

Nothing **CONFIDENTIAL**

to do
just FYI
Maggie

19 April 1994

Dear Joe,

Attached is a draft of a planning calendar that is being prepared to try to make it easier to "look at" all of the information required to do schedule planning. Your department's input would help make it a more useful tool.

Specifically:

1. Could you (or someone in your department) provide a list of the most important "political" events for the next four weeks? (These are not necessarily events that you want POTUS to attend. It should be a list of events that you feel that the "planning group" should have in mind when thinking through that week's schedule.) To keep the information at a manageable level, we are asking all departments to prioritize and select no more than the two events per day, and no more than ten events per week. Ideally, this information would be updated every Wednesday by 5:00 pm.
2. Do you have any comments on how this calendar could be made more useful for your department?

Please have your department's "prioritized" event information sent to Paul Antony, c/o Office of the Chief of Staff, OEOB 176, 456-6595.

Thanks again for your help. Please don't hesitate to contact me if you have any questions or concerns.



**DETERMINED TO BE AN ADMINISTRATIVE
MARKING Per E.O. 12958 as amended, Sec. 3.3 (c)**

Initials: PA Date: 9/5/2013

2013-0359-5

STEPS FOR DEVELOPING POTUS SCHEDULE

CONFIDENTIAL

ALL SCHEDULING REQUESTS

Letters from individuals

Media requests

constituency groups

Cabinet requests

Fundraisers

congressional requests etc.....

Ricki

Cab. Affairs

Communi.

Political Affairs

Public Liaison

Leg. Affairs

NSC

War Rooms.

APs formal scheduling proposal

circulate proposals

DOS collects input on proposals

DOS develops "strawman" schedule
(rolling 4 wks)

Scheduling committee sign-off

POTUS SCHEDULE

*No prioritizing
w/ each
department*
*No one thinks
proposal has
sufficient air*

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Initials: By Date: 9/5/2013

2013-0359-5

DRAFT

SUGGESTED STEPS FOR DEVELOPING A POTUS SCHEDULE

1. Scheduling requests come from many sources.
2. DOS circulates scheduling requests to appropriate AP's for initial screening.
3. AP's generate formal scheduling proposal (using std form) for items they think merit POTUS time and submit request to scheduling. Requests should be submitted in a prioritized manner.
4. Scheduling should circulate scheduling proposal to AP's for input (Support/Don't Support/Neutral).
5. Director of scheduling collects proposal from AP's.
6. DOS develops "strawman" rolling four week proposed schedule.
7. Schedule is discussed and finalized with Scheduling committee.
 - a. Committee meets once/week.
 - b. Defined/limited membership on scheduling committee. Must include key staff that can "put" things on the schedule. Membership must remain consistent. Cannot have different staff members at each meeting.
 - c. Any other staff with strong feelings about upcoming scheduling decisions, need to provide that information to a member of the scheduling committee. Cannot allow "end-running" of the process. e.g., there should be NO scheduling requests that bypass this process.
8. Every week the committee should produce a scheduling plan for the next four weeks, that reflects the consensus of the committee and highlights any scheduling decisions that require further input from POTUS.

THE WHITE HOUSE

WASHINGTON

May 24, 1994

MEMORANDUM TO THE D-DAY WORKING GROUP

FROM: DON BAER AND JEREMY ROSNER

SUBJECT: Speech overview

The following are our recommendations for how to use the President's speaking opportunities during the trip.

- Thursday: Address to the citizens of Rome. Theme: Strengthening U.S. bonds with Europe; the importance of European integration.
- Friday: Nettuno American Cemetery. Theme: The sacrifices of the World War II generation will not be forgotten.
- Saturday: Cambridge American Cemetery. Theme: The sacrifices that won freedom for a generation took more than one day. The importance of air power.
- Sunday: Aboard U.S.S. George Washington (to Armed Services). Theme: Freedom's burdens today.
- Monday: Point Du Hoc. Theme: The successor
(D-Day) generation pays homage to the World War II generation and embraces the responsibility to make the sacrifices to pass freedom on to another generation.
- Colleville (Omaha Beach). Theme: Reprise of Point Du Hoc, with further emphasis on the follow-through at home and abroad necessary to secure freedom and to use it wisely for another generation.
- (Note: Other speeches at Sunrise Service and Utah Beach will be shorter)
- Tuesday: French National Assembly. Theme: Policy address on European integration.
- Wednesday: Oxford Degree Ceremony. Theme: Restatement of generational follow-through with optimism and confidence about seizing the future.

Please fill out this form to help us ensure that everyone involved in the execution of this event are working towards the same goals.

EVENT "MESSAGE" FORM

EVENT: _____

EVENT COORDINATOR: _____

DATE OF EVENT: _____

RESPONSIBLE FOR COMPLETING THIS FORM: David Dreyer or: _____

DEADLINE: _____

RETURN COMPLETED FORM TO EVENT COORDINATOR

INITIALED BY SCHEDULING DIR: _____

DESIRED "HEADLINE":

MESSAGE THAT THE PRESIDENT WILL CONVEY:

DESIRED VISUAL FOR EVENT:

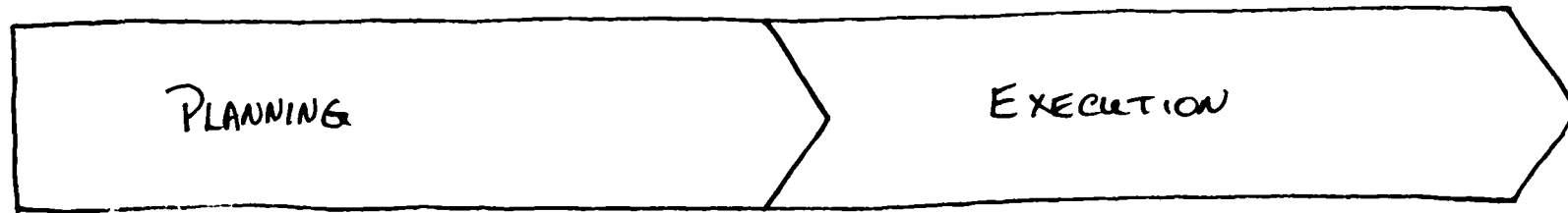
DESIRED AUDIENCE AT SITE:

CONCISE ANSWER TO THE QUESTION, "WHY ARE WE DOING THIS EVENT?":

EVENT MANAGER "ONE PAGE" SUMMARY WORKSHEET

ref#	ACTIVITY
35	☐ CONVENE EVENT/TRIP MEETING.
28	☐ DEFINE EVENT MESSAGE.
30	Complete "message" form.
15	☐ SELECT STATE/CITY/SITES. (If not predetermined or if problems arise.)
17	Assemble basic information on marginal value of particular locations
18	☐ Collect info on travel of four principals to area.
19	☐ Collect info on Congressional delegation/legislative strategy preferences
20	☐ Collect info on DNC election targeting strategy preferences?
24	☐ Collect info on governor, local official preferences.
25	☐ Collect info on POTUS personal politics preferences?
26	Final approval of State/City/Site.
110	☐ DETERMINE ROLE OF CONGRESSIONAL DELEGATION.
118	☐ DETERMINE ROLE OF LOCAL OFFICIALS.
128	☐ DETERMINE ROLE OF CONSTITUENCY GROUPS.
143	☐ ORGANIZE POLITICAL CLUTCHES.
148	☐ GENERATE/COORDINATE LIST OF GREETERS FOR ARRIVALS.
154	☐ DETERMINE WHO SPEAKS AT EVENT.
160	☐ GENERATE/COORDINATE EVENT INVITATION LISTS.
166	☐ ENSURE POTUS PERSONAL POLITICS HAVE BEEN ADDRESSED.
238	☐ PRESIDENTIAL REMARKS
170	☐ ENSURE BRIEFING MATERIALS FOR POTUS ARE PREPARED.
173	☐ Prepare Event Memo.
174	☐ Prepare Presidential remarks.
177	☐ Prepare local issues briefing.
178	☐ Prepare political issues briefing.
179	☐ Prepare economic issues briefing.
180	☐ Prepare "What has the Administration done for this area?" briefing.
194	☐ DEVELOP NATIONAL PRESS PLAN.
195	Develop/publish press schedule
196	Define press logistics requirements.
206	☐ DEVELOP REGIONAL PRESS PLAN.
215	☐ DEVELOP SPECIALITY PRESS PLAN.
224	☐ DEFINE FUNDING REQUIREMENTS.
137	☐ DETERMINE HOW TO BEST LEVERAGE CABINET AGENCIES.
247	☐ PREPARE TRIP BOOK.
255	☐ DECIDE WHO BRIEFS POTUS ON EVENTS.
258	☐ DETERMINE TRAVELING PARTY.
73	☐ ASSIGNS TASKS/FOLLOW-UP FOR DIFFERENT DEPARTMENTS.
75	☐ FOLLOW-UP/INFORM STAFF NOT PRESENT AT EVENT MEETING.

SPECIFIC STAFF MEMBER RESPONSIBLE	DEFAULT RESPONSIBLE DEPARTMENT	DEADLINE	COMMENTS
	Event Manager		
	Communications Contact		
	David Dreyer		
	Event Manager		
	Event Manager		
	Scheduling		
	Legislative Affairs		
	Political Affairs		
	Intergovernmental		
	Political Affairs		
Ricki Seidman	Ricki Seidman		
	Legislative Affairs		
	Intergovernmental		
	Public Liason		
	Political Affairs		
	Political Affairs		
	Political Affairs		
	Event Manager		
	Political Affairs		
	Don Baer?		
	Staff Secretary		
	Staff/Policy Contact		
	Speechwriting		
	Paul Meyer/Research		
	Political Affairs		
	Paul Deegan/NEC		
	Cabinet Affairs		
	Ginny Terzano		
	COM/Press Office		
	COM/Press Office		
	David Dreyer		
	David Dreyer		
	Advance		
	Cabinet Affairs		
	Logistics Contact		
	Event Manager		
	WS/Trip Director		
	Event Manager		
	Event Manager		



- Too many last minute scheduling decisions.
- Need clearly defined scheduling committee (similar to previous administrations.)
- Planning calendar with key information from ALL departments is important.
- Need to clarify responsibilities of different departments (e.g. social office vs.. scheduling & advance vs. staff contact.)
- Responsibility for some items still falling through the cracks.
- Message or goals for events rarely made clear to staff executing event.

POSSIBLE CALENDAR INFORMATION SOURCES

<u>CATEGORY</u>	<u>INFO SOURCE</u>	<u>DEADLINE</u>	<u>COPY</u>	<u>TALK</u>	<u>ON BOARD</u>
POTUS	Ricki Seidman	Fri 4pm	- ✓	✓	?
MAJOR NEWS	Paul Meyer/COM - AP Daybooks, etc. Other staff recs.	Mon 8am	- ✓	✓	✓
LEGISLATIVE	^{Richalti} Steve ?-Senate/LA Lorraine ?-House Miller Cassie O'Neal	Thur 5pm	- ✓	✓	✓
POLITICAL	Joan Baggett/PA Joe Velasquez	Wed 5pm	- ✓	✓	✓
MAJOR PUBLIC	Alexis Herman/OPL Flo McCaffee	Wed 5pm	- ✓	✓	✓
NSC/FOREIGN	Will Itoh?/NSC	Wed 5pm	- ✓	.	
MAJOR CABINET	Christine Varney/CA Steve Silverman	Wed 5pm	- ✓	✓	✓
VP/HRC/MEG	David Strauss/VP? Tony Wilson ✓✓✓ Patti Solis/HRC? Cindy Gire Skylla Harris/MEG?		- ✓	✓	✓
<u>Other</u>	David Draper		✓	✓	✓
	Harold Idles		✓		
	Phil Lader		✓	✓	✓
	Don Baer		✓		✓
	Jack Quinn			✓	✓
	Susan Thomases		✓	✓	✓
	Jody Greenstone		✓	✓	✓
	Tony Wilson		✓	✓	✓

rec
David Str

SAMPLE SCHEDULING PLANNING CALENDAR (FOR WEEK OF 24 APRIL)

SELECTED EVENT CATEGORIES

DATE	POTUS	MAJOR NEWS	LEGISLATIVE	POLITICAL	MAJOR PUBLIC	NSC/FOREIGN	MAJOR CABINET	VP/HRC/MEG
SUN 4/24	- OFF		HC: Full House committee action expected this week?		- Newspaper Ass. of Amer. (thru 4/27) - Natl Acad of Pediatrics (thru 4/27) - Natl Acad of Sciences (thru 4/26)	RABIN VISITS MOSCOW	Bentsen: 07 mtgs J. Brown: San Antonio, TX	HRC: San Francisco?
MON 4/25	- HEALTH CARE Detroit, MI	NBC "Jobs & the Economy" (thru 4/29)	HC: House Energy & Comm markup? HC: Senate Finance?		- United Negro College Fund 50th ann	European Finance Ministers mtg - Luxembourg	L. Brown: IL-Eastern Ill Reno: SFO-AP Conf Babbitt: TN Espy: Pascagoula, MS	HRC: Los Angeles? VP: Health Care/NJ VP: Lowey event/NYC VP: Lieberman event/CT
TUE 4/26	- HEALTH CARE (TBD)		House meets at 10:30 am.	- Pa AFL/CIO Convention Pittsburg (thru 4/28) - Mosley-Braun/LA fundraiser?			Espy: Pascagoula, MS Perry: Idaho (thru 4/28) L. Brown: Chicago-Ill. Leg. O'Leary: Portland-Gov. Roberts O'Leary: Wash.-Indian Nations	MEG: Minneapolis?
WED 4/27	- BILL SIGNING: SCHOOL TO WORK?			DNC FR - DC	- National Secretaries Day - NCOA - Business/Education Forum	SOUTH AFRICAN ELECTIONS (thru 4/28)	O'Leary: Pasco, WA-Hanford Babbitt: Lake Tahoe, CA L. Brown: IL legislators - Economic Cluster Lunch	VP: DNC FR - DC
THU 4/28	- NCOA EVENT (T) - Presidential Design Awards - Take our Daughters to Work? - Gov Dean Fundraiser? - Realtor's event?	Take Our Daughters to Work Day	House meets at 2:00 pm	L. Eckels fundraiser? Howard Dean FR - DC	- National Minority Aids Council - "Mother of the Year" Awards - Realtor's Convention		GDP STATS RELEASED Babbitt: Manhattan, KS O'Leary: travel day	
FRI 4/29	- NATIVE AMERICANS - Health Care Regional Media - Tourism/Travel mtg?	- Arbor Day - LA Riots (1992) - Vietnam Withdrawal (1975)	House meets at 11:00 am - No Legislative Business	- National Conference of Black Mayors (thru 4/31)			O'Leary: Oakridge, TN O'Leary: Nashville, TN - Cabinet mtg w/Tribal Idm	MEG: TN (thru 5/2)
SAT 4/30	- Radio Address?						Shalala: Geneva, Switzerland Pena: Omaha, NE-Jeff/Jack Din. O'Leary: Nashville, TN-Fisk U. R. Brown: Miami, FL Cineros: VA L. Brown: New Orleans NCBM-Cineros, Espy, R. Brown	VP: TN?
• Canada/US Goodwill Week		KEY POLICY HIGHLIGHTS FOR WEEK	HEALTH CARE "Employer Responsibility Week"?	CRIME House Bill passage?	WELFARE Kickoff week?	EDUCATION/OTHER School to Work signing?	NEC/ECONOMY GDP STATS: 1Q94?	NSC/FOREIGN POLICY Bosnia?

SAMPLE SCHEDULING PLANNING CALENDAR (FOR WEEK OF 01 MAY)

SELECTED EVENT CATEGORIES

DATE	POTUS	MAJOR NEWS	LEGISLATIVE	POLITICAL	MAJOR PUBLIC	NSC/FOREIGN	MAJOR CABINET	VP/HRC/MEG
SUN 5/1		AMTRAK smoking ban begins	HC: Full-committee Senate activity.		- Pharmaceutical Mfg Ass (thru 5/3)		Shalala: Geneva (thru 5/5)WHO Eapoy: Chicago-NASDA/FMI Reno: Detroit-NAACP	
MON 5/2				DCCC - Huntsville,Atlanta DNC Gala-NYC			Reich: VT-Int video Eapoy: Phoenix-Millers' Reno: Detroit-Econ club L.Brown: MO-ADPA	VP: DCCC Huntsville/Atlanta HRC: State Opinion Leaders MEG: TN-HC
TUE 5/3	CNN World Cont. Conf. Atlanta, GA?	Natl Teacher Day		Indiana, North Carolina, Ohio Primaries	- AARP ANNUAL CONVENTION - National Teacher Day	Japan: Natl Holiday	Riley: Anaheim-AARP J.Brown: Milwaukee-DAV Cisneros: NYC-Cncl Found Reno: Cleveland-Viol. Crime	VP: Harriman dinner VP: REGO town hall? HRC: NYC-Colin Greer
WED 5/4		30th Anniv. of Job Corps		Richards FR	- Am. Coll Phys.Exec.Mtg (thru 5/7)		R.Brown: Warsaw (thru 5/7) J.Brown: Milwaukee Babbitt/Reno: Albuquerque- Native American conf(thru 5/7)	VP/MEG: Mellon Dinner HRC: Mellon Dinner (T)
THU 5/5	Women's Health Event?	CINCO DE MAYO			- National Day of Prayer by Presidential Proclamation		Cisneros: San Antonio, TX	VP/MEG: White House Fellows
FRI 5/6		Civil Rights Act of 1960 ann.				- PM RAO OF INDIA - French/British "Chunnel" Inauguration.	J.Brown: Fargo, ND L.Brown: MA Browner: NYC Babbitt: AZ O'Leary: Newport News (t. 5/8)	HRC: State Opinion Leaders
SAT 5/7	- Radio Address?	KENTUCKY DERBY					Riley: Nashville, TN J.Brown: Indianapolis R.Brown: S.Africa? Reno: Billings, MO Babbitt: SFO-Sierra Club	HRC: AFT award MEG: Bazelon Children's Event
• ASIAN PACIFIC AMERICANS HERITAGE MONTH • MENTAL HEALTH MONTH • PHYSICAL FITNESS MONTH • SENIOR CITIZENS MONTH • Childcare Awareness Week • Health Care Administrator's Week • Labor History Week		KEY POLICY HIGHLIGHTS FOR WEEK	HEALTH CARE "Women's Health"	CRIME	WELFARE	EDUCATION/OTHER	NEC/ECONOMY	NSC/FOREIGN POLICY

SAMPLE SCHEDULING PLANNING CALENDAR (FOR WEEK OF 08 MAY)

SELECTED EVENT CATEGORIES

DATE	POTUS	MAJOR NEWS	LEGISLATIVE	POLITICAL	MAJOR PUBLIC	NSC/FOREIGN	MAJOR CABINET	VP/HRC/MEG
SUN 5/8		MOTHER'S DAY V-E DAY (1945)	HC: Full-committee Senate activity.			Panama: General elections	R. Brown: S. Africa? (thru 5/14) J. Brown: Indianapolis L. Brown: Pr. Rico? (thru 5/10) Christopher/Reno/Babbitt/Cineros: Mexico City (thru 5/9)	HRC: GWU Commencement
MON 5/9							Espy: S. Africa? (thru 5/14)	HRC:?
TUE 5/10	- CFS Institute Dinner (T)			Nebraska, Pennsylvania, W. Virginia Primaries	ANA Conference		Cineros: HI (thru 5/12)	MEG/VP: South African Presidential Inauguration? HRC:?
WED 5/11				AFL-CIO EXECUTIVE COMMITTEE (thru 5/12) - AFT LEO CONF - DC			O'Leary: Atlanta, GA	HRC:?
THU 5/12							Penn: Denver, CO (thru 5/14) L. Brown: St. Louis, MO O'Leary: travel day	VP: WSJ speech? HRC:?
FRI 5/13	GALLAUDET COMMENCEMENT? - RON: Indiana						R. Brown: MI Riley: Columbia, SC O'Leary: Chicago Cineros: NYC Reno: Miami, FL	
SAT 5/14	- DGA-Indianapolis - Radio Address?						Albright: Seattle Cineros: Fairmont, WVA L. Brown: Brockport, NY R. Brown: Laredo, TX	
• National Hospital Week • Alcohol & Other Drug-related Birth Defects Week • National Salvation Army Week		KEY POLICY HIGHLIGHTS FOR WEEK	HEALTH CARE "Children's Week"	CRIME	WELFARE	EDUCATION/OTHER	NEC/ECONOMY	NSC/FOREIGN POLICY

SAMPLE SCHEDULING PLANNING CALENDAR (FOR WEEK OF 15 MAY)

SELECTED EVENT CATEGORIES

DATE	POTUS	MAJOR NEWS	LEGISLATIVE	POLITICAL	MAJOR PUBLIC	NSC/FOREIGN	MAJOR CABINET	VP/HRC/MEG
SUN 5/15	FoP event on the Mall?				Denver Airport Opens		Espy: S.Africa (thru 5/16) Pena: Denver, CO	HRC: Campaign Commence.
MON 5/16							Riley: Atlanta-Darden L.Brown: Philadelphia-Crime	VP: Cabinet Dinner? HRC: Midwest travel?
TUE 5/17	(remain in DC?)	BROWN vs BOARD OF EDU. (1954): 40th anniv.		Oregon primary		Norwegian PM Brunndtland visit?		MEG: NYC?
WED 5/18	- Mystery Writers Dinner	HEADSTART 30th Anniv.					L.Brown: Chicago-Law	HRC: Cong. Spouses Inch?
THU 5/19							L.Brown: Greensboro, NC-Police Shalala: Detroit-Dem fundraiser	
FRI 5/20		MOTOR VOTER (1993) anniv		Fundraiser Orange County, CA		Cuban Independence Day	L.Brown: NYC-UNDCP Shalala: Minot, ND-graduation R.Brown: Akron, OH-Sawyer	
SAT 5/21		ARMED SERVICES DAY					R.Brown: Nebraska-Sen. Kerry Panetta: Davis, CA-commence. Pena: Austin, TX-commence. J.Brown: HI-travel day	VP: TN?
		KEY POLICY HIGHLIGHTS FOR WEEK	HEALTH CARE	CRIME	WELFARE	EDUCATION/OTHER	NEC/ECONOMY	NSC/FOREIGN POLICY

SAMPLE SCHEDULING PLANNING CALENDAR (FOR WEEK OF 22 MAY)

SELECTED EVENT CATEGORIES

DATE	POTUS	MAJOR NEWS	LEGISLATIVE	POLITICAL	MAJOR PUBLIC	NSC/FOREIGN	MAJOR CABINET	VP/HRC/MEG
SUN 5/22	- Sports Awards event?	PENTECOST	HC: Full-committee Senate activity.					
MON 5/23				SC Coord Campaign				HRC: Travel HC? VP: South Carolina event
TUE 5/24				Arkansas, Idaho, Kentucky Primaries				HRC: NYC-Drug Free Am.
WED 5/25	NAVAL ACADEMY COMMENCEMENT - Glenn fundraiser (T)			DNC Donor Program				VP: DNC event
THU 5/26				Black Trade Unionists - Orlando (thru 5/30)				
FRI 5/27			SENATE & HOUSE RECESS					
SAT 5/28								VP: Academy Graduation
		KEY POLICY HIGHLIGHTS FOR WEEK	HEALTH CARE	CRIME	WELFARE	EDUCATION/OTHER	NEC/ECONOMY	NSC/FOREIGN POLICY

*File
Scheduling*

THE WHITE HOUSE

WASHINGTON

31 May 1994

~~CONFIDENTIAL~~

MEMORANDUM FOR MAGGIE WILLIAMS
RICKI SEIDMAN

FROM: HAROLD ICKES *(13)*
SUBJECT: Analyzing the President's Schedule

Attached is a self-explanatory 28 May memorandum to me from Mike Berman about analyzing Vice President Mondale's schedule while he was in the White House. Mike included several pages of those monthly time analysis. He said they had proven very useful in helping to better schedule Mondale.

DETERMINED TO BE AN ADMINISTRATIVE
MARKING Per E.O. 12958 as amended, Sec. 3.3 (c)

Initials: *ry* Date: *9/5/2013*
2013-0359-5

M I M O R A N D U M

TO: Harold Ickes
FROM: Mike Berman *MB*
DATE: May 28, 1994
SUBJECT: Schedule analysis

I am attaching a couple of months of the analysis that I mentioned at breakfast. These are the ones that I kept as samples.

This analysis is only of the time he spent in the office although I recall there was a separate analysis done of the time he spent on the road etc.

And doing an overall time analysis would be easy.

The limited number of days that he spent in the office (during most of this year) is a function of the fact that this was during the 1980 re-election campaign and he was on the road a lot. As you recall in the spring the President was not on the road campaigning at all.

If I can be of help as you try to work through this issue please let me know.

VICE PRESIDENT WALTER F. MONDALE

YEAR 1980

TIME ANALYSIS

MONTH July

CATEGORY	HOURS CURRENT MONTH	% CURRENT MONTH	HOURS YEAR TO DATE	% YEAR TO DATE	% ADMIN. TO DATE
5. Press total	7.7	8.7	28.4	4.6	4.8
6. DNC Total	0.	0.	2.9	.5	.4
7. MISCELLANEOUS					
a. Swearing in ceremonies	0.	0.	2.0	.3	.5
b. General	1.	1.9	20.9	3.4	3.8
Total	1.	1.9	22.9	3.7	4.3
8. Meetings w/ Sr. Staff Total	5.1	6.1	39.1	6.3	5.9
9. Private Working Time Total	21.8	24.9	130.8	21.2	17.2
10. Executive Committee	0.	0.	0.	0.	.6
TOTAL HOURS	87.8		617.4		4971.2

TOTAL DAYS IN
OFFICE CURRENT
MONTH

12.5

TIME ANALYSIS

MONTH August

CATEGORY	HOURS CURRENT MONTH	% CURRENT MONTH	HOURS YEAR TO DATE	% YEAR TO DATE	% ADMIN. TO DATE
Meetings with President					
a. President (incl. lunches)	2.0	2.6	25.5	3.7	2.9
b. Pres & Senior Staff	0.	0.	0.	0.	.2
c. Cabinet Meetings	0.	0.	4.0	.6	2.2
d. Cong. Brk. & Mtgs.	3.3	4.3	38.9	5.6	3.8
e. Domestic Issues	4.0	5.3	38.3	5.5	6.0
f. Reps. of other gov'ts.	0.	0.	26.6	3.8	4.8
g. Pres., Brzezinski, Turner	0.	0.	2.5	.4	.8
h. NSC & foreign policy	5.4	7.1	48.9	7.1	5.2
i. Misc.	0.	0.	1.6	.2	.4
Total	14.7	19.3	186.3	26.9	26.2
1a + 1b	2.0	2.6	25.5	3.7	3.2
1c	0.	0.	4.0	.6	2.2
For. Policy, Defense, Intell.					
a. Reps. of other gov'ts.	0.	0.	19.3	2.8	2.6
b. Foreign policy	7.1	9.3	61.1	8.8	6.7
c. Intelligence	0.	0.	3.8	.6	.9
d. Defense	1.5	2.0	3.3	.5	.4
e. Briefings, foreign trips	0.	0.	5.6	.8	1.9
f. Jewish leaders	2.3	3.1	7.5	1.1	1.0
PLUS 1f, 1g, 1h	5.4	7.1	78.0	11.2	10.8
Total	16.3	21.4	178.6	25.7	24.3
Domestic Policy					
a. Labor	1.6	2.1	13.8	2.0	1.6
b. Minorities	.9	1.	4.5	.6	.7
c. Economy	2.5	3.	29.9	4.3	3.9
d. Misc.	10.2	13.	73.8	10.6	11.4
PLUS 1e	4.0	5.	38.3	5.5	6.0
Total	19.2	25.	160.4	23.1	23.5
Congressional Matters					
a. Preside in Senate	0.	0.	.7	.1	.8
b. Meet w/ Members of Congress	3.0	3.	18.8	2.7	5.5
c. Congressional Issues	.9	1.	9.6	1.4	3.2
PLUS 1d	3.3	4.	38.9	5.6	3.8
Total	7.2	9.	67.9	9.8	13.3

-- MORE --

VICE PRESIDENT WALTER F. MONDLE

YEAR 1980

TIME ANALYSIS

MONTH August

CATEGORY	HOURS CURRENT MONTH	% CURRENT MONTH	HOURS YEAR TO DATE	% YEAR TO DATE	% ADMIN. TO DATE
5. Press total	4.9	6.5	33.3	4.8	4.8
6. DNC Total	0.	0.	2.9	.4	.4
7. MISCELLANEOUS					
a. Swearing in ceremonies	0.	0.	2.0	.3	.5
b. General	1.8	3.7	23.7	3.4	3.8
Total	1.8	3.7	25.7	3.7	4.2
8. Meetings w/ Sr. Staff Total	11.0	6.6	44.1	6.4	5.9
9. Private Working Time Total	11.8	24.6	149.5	21.6	17.3
10. Executive Committee	0.	0.	0.	0.	.5
TOTAL HOURS	71.2		693.5		5047.4

TOTAL DAYS IN
OFFICE CURRENT
MONTH12

TIME ANALYSIS

MONTH JUNE

CATEGORY	HOURS CURRENT MONTH	% CURRENT MONTH	HOURS YEAR TO DATE	% YEAR TO DATE	% ADMIN. TO DATE
1. Meetings with President					
a. President (incl. lunches)	1.7	4.2	21.7	4.1	2.9
b. Pres & Senior Staff	0.	0.	0.	0.	.2
c. Cabinet Meetings	0.	0.	4.0	.8	2.2
d. Cong. Brk. & Mtgs.	1.8	5.6	33.8	6.4	3.8
e. Domestic Issues	2.5	7.9	31.7	6.0	6.1
f. Repts. of other gov'ts.	1.	0.	25.4	4.8	5.0
g. Pres., Brzezinski, Turner	.5	.6	2.0	.4	.8
h. NSC & foreign policy	1.9	4.5	41.8	7.9	5.2
i. Misc.	1.1	1.3	1.3	.3	.4
Total	11.5	12.1	161.6	30.5	26.6
1a + 1b	1.7	4.2	21.7	4.1	3.2
1c	0.	0.	4.0	.8	2.2
2. For. Policy, Defense, Intell.					
a. Repts. of other gov'ts.	5.2	6.0	16.3	3.1	2.6
b. Foreign policy	4.0	4.6	49.1	9.3	6.7
c. Intelligence	1.3	1.4	3.8	.7	1.0
d. Defense	1.	0.	.3	.0	.4
e. Briefings, foreign trips	0.	0.	1.9	.4	1.8
f. Jewish leaders	1.0	1.2	4.8	.9	.9
PLUS 1f, 1g, 1h	1.4	5.1	69.2	13.1	10.9
Total	15.8	18.3	145.4	27.5	24.5
3. Domestic Policy					
a. Labor	0.	0.	10.6	2.0	1.6
b. Minorities	1.5	1.1	3.1	.6	.7
c. Economy	5.9	6.1	22.6	4.3	3.8
d. Misc.	1.0	1.2	49.2	9.3	11.3
PLUS 1e	2.5	2.1	31.7	6.0	6.1
Total	10.9	20.5	117.1	22.1	23.5
4. Congressional Matters					
a. Preside in Senate	0.	0.	.7	.1	.8
b. Meet w/ Members of Congress	4.3	5.1	13.6	2.6	5.5
c. Congressional Issues	1.6	1.1	4.5	.8	3.3
PLUS 1d	4.8	5.1	33.8	6.4	3.8
Total	10.8	12.3	52.5	9.9	13.4

-- MORE --

VICE PRESIDENT WALTER F. MONDALE

YEAR 1980

TIME ANALYSIS

MONTH JUNE

CATEGORY	HOURS CURRENT MONTH	% CURRENT MONTH	HOURS YEAR TO DATE	% YEAR TO DATE	% ADMIN. TO DATE
5. Press total	5.5	6.4	20.8	3.9	4.7
6. DNC Total	.6	.7	2.9	.6	.4
7. MISCELLANEOUS					
a. Swearing in ceremonies	.3	.4	2.0	.4	.5
b. General	2.1	2.4	19.2	3.6	3.8
Total	2.4	2.8	21.2	4.0	4.3
8. Meetings w/ Sr. Staff Total	4.6	5.3	33.7	6.4	5.9
9. Private Working Time Total	21.1	24.4	108.9	20.6	17.1
10. Executive Committee	0.	0.	0.	0.	.6
TOTAL HOURS	86.4		529.5		4883.4

TOTAL DAYS IN
OFFICE CURRENT
MONTH

15

TIME ANALYSIS

MONTH July

CATEGORY	HOURS CURRENT MONTH	% CURRENT MONTH	HOURS YEAR TO DATE	% YEAR TO DATE	% ADMIN. TO DATE
Meetings with President					
a. President (incl. lunches)	1.8	2.1	23.5	3.8	2.9
b. Pres & Senior Staff	0.	0.	0.	0.	.2
c. Cabinet Meetings	0.	0.	4.0	.6	2.2
d. Cong. Brk. & Mtgs.	1.9	2.2	35.7	5.8	3.8
e. Domestic Issues	2.7	3.0	34.3	5.6	6.0
f. Reps. of other gov'ts.	1.2	1.3	26.6	4.3	4.9
g. Pres., Brzezinski, Turner	.5	.6	2.5	.4	.8
h. NSC & foreign policy	1.8	2.0	43.5	7.0	5.1
i. Misc.	.3	.3	1.6	.3	.4
Total	10.2	11.5	171.7	27.8	26.3
1a + 1b	1.8	2.1	23.5	3.8	3.2
1c	0.	0.	4.0	.6	2.2
For. Policy, Defense, Intell.					
a. Reps. of other gov'ts.	3.0	3.4	19.3	3.1	2.7
b. Foreign policy	4.9	5.6	54.0	8.7	6.7
c. Intelligence	0.	0.	3.8	.6	.9
d. Defense	1.5	1.7	1.8	.3	.4
e. Briefings, foreign trips	3.7	4.2	5.6	.9	1.9
f. Jewish leaders	.3	.4	5.2	.8	.9
PLUS 1f, 1g, 1h	3.4	3.9	72.6	11.8	10.8
Total	16.8	19.2	162.3	26.3	24.4
Domestic Policy					
a. Labor	1.7	1.9	12.3	2.0	1.6
b. Minorities	.5	.6	3.6	.6	.7
c. Economy	4.8	5.5	27.4	4.4	3.9
d. Misc.	14.5	16.5	63.7	1.0	11.4
PLUS 1e	2.7	3.0	34.3	5.6	6.0
Total	24.2	27.5	141.3	22.9	23.5
Congressional Matters					
a. Preside in Senate	0.	0.	.7	.1	.8
b. Meet w/ Members of Congress	2.2	2.5	15.8	2.6	5.5
c. Congressional Issues	6.2	7.1	8.7	1.4	3.3
PLUS 1d	1.9	2.2	35.7	5.8	3.8
Total	10.3	11.8	60.8	9.8	13.3

-- MORE --

~~CONFIDENTIAL~~

THE WHITE HOUSE
WASHINGTON

MEMORANDUM TO ALL SENIOR STAFF

FROM: ERSKINE BOWLES *EB*
MARK GEARAN *MG*
BILLY WEBSTER *BW*

SUBJECT: PLANNING CALENDAR

In an effort to make the short-term and long-term planning process more productive and efficient for the President, we are asking each department head to provide information for a two year planning calendar.

We would request that you provide us, no later than close of business Wednesday, October 12, 1994 with the following information:

- (1) Any event, speech, announcement or other annual occasion that will require the President's time / participation. This list should only include items that are **virtually certain** to involve the President. (For example, the State of the Union Address, National Prayer Breakfast, G-7 Summit, National Governors' Association Conference, etc.)
- (2) Other events, speeches, announcements or occasions that will **likely** request Presidential participation. These events are more "discretionary" in nature, and should be prioritized. Please indicate the three events that you cannot live without.

NOTE: If your department / subject matter includes legislative and policy initiatives, please include all related events.

Please have your designated staff person supply information each week starting Wednesday, October 12 to Billy Webster in the Scheduling Office. If your department can not comply with this request, please contact Erskine Bowles by Monday, October 10, otherwise, we will expect your input.

Thank you for your assistance.

DETERMINED TO BE AN ADMINISTRATIVE
MARKING Per E.O. 12958 as amended, Sec. 3.3 (c)
Initials: *BW* Date: 9/5/2013
2013-0359-5

Category**Senior Staff**

MAJOR NEWS

Mark Gearan

LEGISLATIVE

Pat Griffin

POLITICAL

Joan Baggett

PUBLIC

Alexis Herman

NSC/FOREIGN

Tony Lake

CABINET

Christine Varney

VP

Jack Quinn

HRC

Maggie Williams

MEG

Skyla Harris

HEALTH CARE

Harold Ickes

NEC/ECONOMY

Bob Rubin

CRIME

Rahm Emanuel

WELFARE

Carol Rasco

EDUCATION

Carol Rasco

cc. GEORGE STEPHANOPOULOS
MACK McLARTY
DAVID DREYER
DAVID GERGEN

~~CONFIDENTIAL~~

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

DETERMINED TO BE AN ADMINISTRATIVE
MARKING Per E.O. 12958 as amended, Sec. 3.3 (c)

Initials: PH

Date: 9/5/2013

2013-0359-S

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.

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)				

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 Stephaie 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					

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

(IMPORTANT NOTE: Briefing memoranda ¹³ [with 16 Copies] must be delivered to the Staff Secretary by 3:00 p.m. the day before the scheduled meeting or event.)

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.

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: _____

7/11/12/13/14/15/16/17/18/19/20/21/22/23/24/25/26/27/28/29/30/31/32/33/34/35/36/37/38/39/40/41/42/43/44/45/46/47/48/49/50/51/52/53/54/55/56/57/58/59/60/61/62/63/64/65/66/67/68/69/70/71/72/73/74/75/76/77/78/79/80/81/82/83/84/85/86/87/88/89/90/91/92/93/94/95/96/97/98/99/100

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

DETERMINED TO BE AN ADMINISTRATIVE
MARKING Per E.O. 12958 as amended, Sec. 3.3 (c)
Initials: PH Date: 9/5/2013
2013-0359-5

Presidential Scheduling Procedures

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Long-Range Scheduling Meetings

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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

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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.

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)

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 Stephaie 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
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4 Stephanie Streett	5 Anne Walley	6 Stephanie Streett	7 Anne Walley	8 Stephanie Streett	9 Anne Walley	10 Stephanie Streett
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11 Anne Walley	12 Stephanie Streett	13 Anne Walley	14 Stephanie Streett	15 Anne Walley	16 Stephanie Streett	17 Anne Walley
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18 Stephanie Streett	19 Anne Walley	20 Stephanie Streett	21 Anne Walley	22 Stephanie Streett	23 Anne Walley	24 Stephanie Streett
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25 Anne Walley	26 Stephanie Streett	27 Anne Walley	28 Stephanie Streett	29 Anne Walley	30 Stephanie Streett
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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					

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

(IMPORTANT NOTE: Briefing memoranda (with ¹³~~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: _____
