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THE WHITE HOUSE

WASHINGTON

January 12, 1984

MEMORANDUM FOR JAMES A. BAKER, III
MICHAEL K. DEEVER
MICHAEL A. MCMANUS
JOHN F.W. ROGERS
MARGARET TUTWILER
ADMIRAL DANIEL J. MURPHY

FROM: FRED F. FIELDING 
COUNSEL TO THE PRESIDENT

SUBJECT: Payment of Expenses Associated With Political
Travel of the President and the Vice President

This will respond to your request for guidance on certain questions related to the payment of expenses associated with political travel of the President and Vice President in 1984.

As you are aware, under Federal election laws, the President is legally a "candidate" for re-election. Hence, any Presidential trip involving political activity must be examined under applicable Federal election laws prior to a determination regarding payment of expenses associated with that trip. Federal Election Commission ("FEC") regulations require that all "campaign-related" travel of a candidate seeking nomination for election to the office of President must be paid by the candidate's authorized campaign committee. 11 C.F.R. § 9034.7. Moreover, the FEC has stated that any partisan political travel undertaken by a President who is also a candidate for re-election in a Presidential election year (i.e., 1984) is presumed to be "campaign-related." 11 C.F.R. § 110.8(e). Thus, as a general rule, FEC regulations regarding allocation of campaign-related travel expenses will apply to any Presidential travel in 1984 which includes partisan political activities.

The general method for allocation of official and campaign-related travel costs is as follows:

1. If any campaign activity (other than "incidental contacts") is conducted at a stop (i.e., city), that stop shall be identified as campaign-related and, in general, all costs associated with it must be paid by the President's campaign committee.

2. For a trip that includes campaign-related and non-campaign related stops, that portion of the trip allocable to campaign activity must be paid by the campaign committee.

Such portion shall be determined by using the "hypothetical trip formula": calculate what the trip would have cost from the point of origin to the first campaign-related stop and from that stop to each subsequent campaign-related stop, back to the point of origin. */

3. If a Government conveyance is used for campaign-related travel, the campaign committee shall pay the appropriate Government entity the first class commercial airfare plus the cost of other services in the case of travel to a city served by regularly scheduled commercial service, and the commercial charter rate plus the cost of other services in the case of travel to a city not served by regularly scheduled commercial service. If Government cars are used for campaign-related travel, the Government shall be reimbursed the commercial rental cost of such automobiles.

To adequately document these travel allocations the FEC requires a campaign committee (a) to prepare, or otherwise have available, an itinerary for each trip; and (b) if Government conveyance is used, to prepare a list of all passengers, along with a designation as to which passengers are, or are not, campaign-related. This documentation must be available to the FEC for inspection and audit. 11 C.F.R. §§ 9034.7(b)(3) and (4). Obviously, these documentation requirements will necessitate close coordination between the White House Office of Administration and the campaign treasurer.

4. A candidate's spouse and family are not considered to be traveling for campaign purposes unless they engage in campaign activity during the trip; if they engage in such activities, their travel expenses must be allocated on the same basis as the candidate's. 11 C.F.R. § 9034.7(b)(6) and 11 C.F.R. § 106.3(c)(2).

5. Representatives of the media traveling on Government aircraft will always be required to reimburse the Government in the appropriate amount, whether the trip is official, political or mixed. Hence, media traveling on Air Force 1 or 2 should reimburse the Government for their air travel by paying the first class air fare plus the cost of inflight services for any such trips they make. See 11 C.F.R. § 9034.6.

*/ Although it could be argued that strict compliance with the FEC's hypothetical trip rule will result in an augmentation of appropriations where the President or Vice President conduct both official and political activities at one "stop", i.e., city, we are of the opinion that any such augmentations should be considered de minimis.

Hypothetical Trip

Set forth below is an example of the application of the above rules to a hypothetical trip by the President.

Day 1: President departs Andrews Air Force Base (AAFB) enroute to Santa Barbara. Upon arrival at Santa Barbara, the President proceeds to Ranch for private time and the accompanying staff stay in Santa Barbara.

Day 2: Private time in Santa Barbara.

Day 3: 9:00 a.m. -- Depart Santa Barbara enroute Los Angeles.
10:00 a.m. -- Official event with Los Angeles Olympic Committee.
12:00 noon -- Fundraising Luncheon
1:00 p.m. -- President departs Los Angeles for Texas.
4:00 p.m. -- President arrives Dallas, Texas.
7:00 p.m. -- President addresses National Hispanic Assembly (a bipartisan organization).
Overnight in Texas.

Day 4: 9:00 a.m. -- President attends Political Fund-raising Breakfast.
10:30 a.m. -- Depart Texas enroute New York.
3:45 p.m. -- President addresses Women's Business Council.
4:30 p.m. -- President departs New York enroute AAFB.
5:00 p.m. -- President arrives AAFB.

A. Allocation of Costs for Air Force I

Reagan-Bush '84 would be billed the costs of a first class airfare ticket plus one dollar for each passenger on Air Force 1 designated as "political" who is traveling from Washington, D.C. to Los Angeles to Dallas and back to Washington. (Santa Barbara and New York are not included because those stops were completely "official".)

B. Allocation of Other Costs

All costs solely associated with Santa Barbara and New York would be paid from appropriated funds.

All costs solely associated with Los Angeles and Dallas would be paid from political funds unless there were specific costs

(e.g., WHCA sound system for Olympic Committee or National Hispanic Assembly addresses) incurred because of the official events.

In Los Angeles and Dallas, Reagan-Bush '84 should pay the Government the equivalent rate of a rented large car to compensate for the use of a Government vehicle in transporting the President to political events. If any other Government vehicles are used in such motorcades for reasons unrelated to the security of the President, Reagan-Bush '84 should also pay the Government for the use of such vehicles.

The hotel costs for the overnight in Texas will be paid by Reagan-Bush '84. The hotel costs for staff in Santa Barbara would be official expenses.

Since Government regulations require per diems to be paid on a quarter of a day basis, any "political activity" in a quarter will make that entire per diem quarter attributable to Reagan-Bush '84. Any time spent in a city where a political event will occur will be allocated as "political activity" for per diem purposes. Additionally, travel time between 2 political stops will be allocated as "political activity" for purposes of per diem allocations. Hence, in the above hypothetical trip, the per diems would begin to be allocated to Reagan-Bush '84 at 10:00 a.m. of Day 3 and continue to be allocated to Reagan-Bush '84 until 10:30 on Day 4 (when the President departed Texas enroute to New York, an entirely official stop).

WHCA set-up costs shall be billed on the basis of the number and nature of sites where set-ups have occurred; hence, WHCA will continue to bill the appropriate political entity for any costs incurred in a set-up for a political site. Costs for transportation and set-ups for media covering the President will continue to be billed directly to those media entities.

Allocation of Costs for Individuals Not Traveling With the President

A. Surrogates

The FEC "hypothetical trip rule" for allocation of travel costs also applies to individuals traveling on behalf of a candidate when they are not with that candidate. 11 C.F.R. § 9034.7(a).

If Administration officials use Government aircraft for "mixed" travel, the hypothetical trip rule must be applied to their travel schedule to determine the appropriate amount of reimbursement the Reagan-Bush Committee must make to the

Government. The method of allocation of travel costs will be determined by the same formula as discussed on page 2 of this memorandum.

If Administration officials use commercial transportation in campaign-related travel, FEC regulations require the campaign committee to pay for the "actual costs" of such transportation. In some instances, the "actual costs" could be the "Government rate" costs of commercial airfare. This could result in the allegation that official Government authority was being misused to financially benefit the campaign. This discrepancy in actual costs will be avoided if all "surrogate" or political advance ticketing is done through the campaign committee. Moreover, in order to avoid any appearance of impropriety, we recommend that the campaign committee be charged for the standard commercial rates for any air travel by surrogates or administration advance staff when they engage in campaign-related travel, even if the tickets for such travel were purchased at the Government rates. */ Consistent with that policy, when White House staff or other administration officials travel on official business and then add a "political" stop to such travel, the campaign committee must reimburse the Government for that individual's travel according to the hypothetical trip formula established by FEC regulations and on the basis of standard commercial airfare (rather than Government rates).

B. Advance Staff

White House Office advance staff may do advance work on "mixed" Presidential travel. The costs for their transportation and lodging should be allocated to the Reagan-Bush Committee on the hypothetical trip formula. For example, in the hypothetical trip detailed on page 3, the travel costs of the advance staff working on the Los Angeles and Texas events would be paid by the Reagan-Bush Committee on the hypothetical trip basis, unless it can be clearly established that certain advance staff worked only on the official events in those cities; in such instances those individuals' travel costs would, of course, be paid from official funds.

If Reagan-Bush advance staff travel by Government transportation, the Reagan-Bush Committee should reimburse the Government for such transportation, paying the first class commercial airfare plus \$1 for each individual so traveling.

*/ Any "supplementation" of Government appropriations created by this policy should be considered de minimis.

cc: William Henkel
Theresa Elmore
Grey Terry

Edward J. Rollins
Bay Buchanan Jackson
Ron Robertson

THE WHITE HOUSE

WASHINGTON

November 1, 1983

MEMORANDUM FOR ALL WHITE HOUSE STAFF

FROM: FRED F. FIELDING 
COUNSEL TO THE PRESIDENT

SUBJECT: Political Activity

On October 17, the President authorized the formation of a campaign committee to work on behalf of his re-election. The purpose of this memorandum is to advise you of the legal and policy limitations on your individual political activity on behalf of Reagan-Bush '84.

First, only those employees in the Executive Office of the President who are paid from the appropriations for the White House Office may engage in political activity. You should check with your supervising officer to ascertain whether you are paid from White House Office appropriations; do not assume that because you have a White House pass you are paid from White House Office appropriations. If you are not paid from appropriations for the White House Office, you are subject to the provisions of the Hatch Act and may not engage in any partisan political activities. For a discussion of the permissible and impermissible activities of "hatched" employees, please turn to pages 8-11 of this memorandum. You will be expected to adhere strictly to the guidelines set forth on those pages.

Second, you should be aware that Federal law (18 U.S.C. § 603) prohibits any employee of the White House Office from contributing to the authorized campaign committee of the President, i.e., Reagan-Bush '84.

USE OF LEAVE

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

(2) Those White House staff members who complete a

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

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

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

(5) Some White House staff members are entitled to specific amounts of annual leave. Such leave may be used for campaign purposes; however, one cannot take an "advance" on annual leave to work on the campaign. Those White House staff not entitled to annual leave (e.g., commissioned officers) may use a ceiling of 15 days of paid leave (i.e., the equivalent of vacation time) for political campaign purposes.

(6) The following procedures will be followed when annual leave or leave without pay is used for campaign purposes:

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

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

USE OF VEHICLES AND MESSENGERS

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

campaign-related. Exceptions may be made to this rule only in those limited instances where time is of the essence and no other transportation is readily available. Because of the special requirements surrounding departures and arrivals from Andrews Air Force Base, White House vehicles may be used to transport White House staff members to that facility when they are accompanying the President, Vice President or First Lady on a campaign-related trip. Additionally, where the President is participating in a campaign event in the Washington, D.C. area or other location where White House cars are available for official purposes, White House cars may be used for the Presidential motorcade; however, the campaign committee must reimburse the Government for the fair market rental value of such transportation to the extent that it is not essential to the security and support of the President.

White House messengers should not be used to deliver or pick-up materials from the campaign committee.

USE OF COMMUNICATIONS SYSTEMS AND COPYING MACHINES

(1) In those limited circumstances in which government communication systems (telephone, telegraph, teletype, or radio) are used for campaign-related purposes, appropriate reimbursement or payment must be made by the campaign committee.

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

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

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

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

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

(7) White House Communications Agency (WHCA) facilities provided outside the White House in connection with travel may

continue to be used during mixed and wholly campaign trips. These facilities must be used exclusively for communications relating to trip planning and arrangements and not for direct campaign purposes such as fundraising and crowd building. The government will be reimbursed for the use of these facilities.

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

TRAVEL

Government funds are not to be used for the political travel of staff members. Specific guidelines relating to campaign travel by Senior Administration officials will be circulated by a separate memorandum.

Any political or "mixed" travel by White House staff must be approved in advance by Margaret Tutwiler and John Rogers. No reimbursements will be made for non-approved travel expenses.

MEETINGS IN GOVERNMENT BUILDINGS

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

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

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

USE OF PHOTOGRAPHS

(1) White House photographers may continue to photograph

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

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

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

(4) The campaign committee may purchase for its use photographs taken by White House photographers in those limited circumstances where those photographs provide the only source for a particular picture. All photograph purchase requests from the campaign committee must be directed to the Director of the White House Photo Office. A record of all campaign photo requests will be maintained by the Director of the White House Photo Office who will be responsible for billing the campaign committee for all photo orders on a monthly basis at the normal rate and according to the procedures established by the government for the purchase of pictures.

(5) Photographs of appropriate quality which are produced by campaign photographers may be forwarded to the White House for signature.

CORRESPONDENCE

(1) Campaign-related correspondence must not be produced at the White House, nor can White House stationery, stamps or related supplies be used in the preparation of such correspondence at another location. Campaign-related correspondence, prepared elsewhere, may be brought to the White House for signature.

(2) These guidelines will be followed in handling campaign-related correspondence received at the White House:

(a) Correspondence expressing general support for the President and his policies may continue to be answered as at present. Letters of response may include whatever substantive response is appropriate as well as thanking the writer for his

or her encouragement. Note well, however, that no references should be made to the 1984 elections or the political prospects of the Administration or the Republican Party.

(b) Correspondence which primarily relates to the 1984 campaign should not be answered by White House staff members or other government employees. All such correspondence should be forwarded to the campaign committee. However, if you receive resumes of individuals offering their services to the campaign, you may send an acknowledgement to the sender advising of the referral of his or her resume to the campaign committee.

(c) Correspondence that primarily deals with governmental issues and refers to the campaign may be answered in the White House as to the governmental issues raised but no reference should be made to campaign-related comments. The original of the correspondence can be forwarded to the campaign committee for response to the campaign-related matters.

(d) Federal law prohibits the receipt of contributions in federal buildings. Occasionally, contributions intended for the campaign committee may be addressed to the White House and delivered with other mail. Such contributions should be handled as they have in the past, by returning the contributions to the sender with an explanation of the applicable Federal law and a statement of the appropriate recipient's address. (Appropriate language may be obtained from the White House Counsel's Office.) There should be no acknowledgement of receipt of a contribution from the White House to the contributor. If the contribution is accompanied by a letter that deals primarily with governmental issues, a response dealing with those issues may be prepared and sent from the White House; however, there must be no reference to the contribution.

(e) The White House or EOB address should not be suggested as a place where any communication relative to the campaign should be addressed. All such communications should be sent to Reagan-Bush '84, 440 First Street N.W., Washington, D.C. 20001.

(f) In responding to incoming mail and preparing outgoing correspondence, staff members should be guided by the following:

- No reference should be made to the writer's, the recipient's or any other individual's future support, role or interest in a political campaign;
- No reference should be made to any past, present or future political contributions;

- Outgoing correspondence should be prepared with a view toward possible interpretations by a third party reader: Your intentions are not the only criteria by which your words are judged.

CRIMINAL STATUTES

A number of criminal statutes prohibit the use of Federal programs, property, or employment for political purposes. Violation of these criminal statutes are punishable by imprisonment and/or the payment of a substantial fine. Certain staff members may also be subject to investigation and possible prosecution by a Special Prosecutor in connection with alleged violations of these statutes.

Solicitation of Campaign Contributions: Solicitation of campaign contributions from or by Federal employees is prohibited, as is the solicitation or receipt of contributions in Federal buildings or on Federal property. Unless specifically approved by the White House Counsel's Office, no White House staff member shall sign a fundraising letter on behalf of any Federal candidate.

Use of Official Authority: Criminal statutes also prohibit a Federal employee from using his or her "official authority for the purpose of interfering with, or affecting, the nomination or the election of any candidate." There is, however, no definitive interpretation as to what types of activities constitute interference with or affecting the results of such an election. If you have any question as to whether any action you may take would be precluded by these laws, do not do it; seek guidance from the White House Counsel before taking any further action.

The following types of activities are prohibited by these laws:

- One Federal employee directly or indirectly soliciting another Federal employee for a campaign contribution.

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

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

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

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

The White House Counsel's Office is available to answer any question on the legality or propriety of activities falling within the statutes discussed above. You should call Sherrie Cooksey at 456-7803 if you have any questions concerning proposed campaign activities.

HATCH ACT

The Hatch Act, 5 U.S.C. §§ 7321-7327, covers all EOP employees except those:

- a) paid from the appropriations for the White House Office;
- b) appointed to their current positions by the President by and with the advice and consent of the Senate;
- c) serving as head or assistant head of an executive or military department.

All other government employees, including Schedule Cs and detailees, are covered by Hatch Act prohibitions. Thus, employees in the Office of the Vice President (other than those paid from Senate appropriations) and the Office of Policy Development, are, among others, "hatched" under the Act and must abide by its provisions.

The restrictions of the Hatch Act are applicable to covered employees 24 hours a day, regardless of whether such employees are on annual or sick leave or leave without pay -- as long as a covered individual is on the employment rolls of the Government, he or she is subject to the restrictions of the Hatch Act.

Employees covered by the Hatch Act may not:

- 1) take an active part in the management of a political campaign;
- 2) be a partisan candidate in an election for state or national office;

- 3) serve as an officer of a political party, a member of a national, state or local committee of a political party, or an officer or member of a committee of a partisan political club;
- 4) organize a political organization or club;
- 5) solicit, receive, handle, otherwise account for, or disburse political contributions;
- 6) sell tickets to, organize or actively participate in any political fundraising activity;
- 7) solicit votes for or against a candidate;
- 8) serve as a party or candidate challenger or pollwatcher;
- 9) drive voters to the polls for a candidate or party;
- 10) endorse or oppose a candidate in a political advertisement, broadcast or campaign literature;
- 11) serve as a delegate or alternate to a political convention;
- 12) organize or actively participate in the activities of a political convention;
- 13) serve on a standing committee of a political convention;
- 14) circulate a candidate nominating petition;
- 15) address a convention, rally, or similar gathering of a political party in support of or in opposition to a partisan candidate for public office.

Employees covered by the Hatch Act may:

- 1) register and vote;
- 2) make financial contributions to a party or candidate, except that 18 U.S.C. § 603 precludes employees of the White House Office from contributing to the authorized campaign committee of the President;
- 3) express their opinion on political subjects;
- 4) wear campaign buttons or display bumperstickers;

- 5) be a member (but not an officer or committee member) of a political party or organization, so long as they do not actively engage in campaign activities;
- 6) attend (but not as a delegate) a political convention, fundraising function or other political gathering, so long as they do not organize or participate in the program of such an activity;
- 7) sign a nominating petition.

The "hatched" support staff of an exempted Administration official may perform their normal clerical and ministerial functions in connection with the political travel and appearances or activities of their principal provided that the functions they perform are related to their official responsibilities. Such employees, however, may not perform tasks that are purely political in nature and which relate solely to their principal's political activities. Hence, a "hatched" employee may make the logistical arrangements for his or her principal's political travel or appearances and even accompany the principal on such travel 1/, but, such employee may not write a purely partisan speech for his or her principal or engage in any of the "management" activities of a political event or convention, e.g., plan or sell tickets to a political event or work on the activities of a committee, such as the Platform or Rules Committees, of a political convention.

Additionally, the Special Counsel of the Merit Systems Protection Board has taken the position that "hatched" employees, may write briefing materials on official Administration activities for use by Administration officials, even when such materials will be included in partisan political statements; however, such employees may not write or prepare any materials that will be used only for political purposes, e.g., materials for the platform of the Republican Party, nor may they prepare any materials containing statements of political advocacy.

Again, if you have any questions with respect to these matters, please call the White House Counsel's Office before you act.

1/ The travel expenses of a "hatched" employee accompanying his or her principal on political business must be paid from appropriated funds.

NOON WIRES UPDATE

CONGRESS-LEBANON — House Democratic leaders are preparing a resolution that would give President Reagan just 30 days to devise a plan to withdraw U.S. forces from Lebanon, Democratic congressional sources said today. The measure was drafted at the behest of Tip O'Neill and will be offered to the full Democratic House membership at a caucus on Wednesday and may be brought up on the House floor next week. (AP)

ANDROPOV-UNESCO — Andropov, responding to a letter from the Director-General of UNESCO, accused the WH of viewing the world as "its sovereign possession," Tass reported. (AP)

Andropov charged that U.S. plans to withdraw from UNESCO showed Washington is opposed to the international struggle against apartheid, racism and poverty. (UPI)

Andropov today pledged firm support for UNESCO. (Reuter)

DEFENSE SALE — Pentagon announced today it intends to sell Egypt air research radar valued at \$154 million and Saudi Arabia aircraft spare parts worth \$63 million, in addition to \$169 million already purchased by the Saudis. (Reuter)

Britain has had it will sell Saudi Arabia whatever weapons it wants and the kingdom is considering the offer, the official Saudi Press Agency said today. (Reuter)

HODEL — Energy Secretary Hodel, believing U.S. oil imports may be disrupted this year, says the Reagan Administration will not use the nation's emergency oil stockpile to temper the rising prices that could result. (AP)

ARMS CONTROL — Richard Perle, Asst. Sec. of Def. for International Security, predicted today that the Soviets "will return" to the negotiations. (AP)

ABE — Japanese Foreign Minister Abe says the U.S. as well as Japan must make concessions if serious trade frictions are to be resolved. (AP)

STOCK MARKET opened lower today, continuing a three-week slide, amid lingering uncertainty on the outlook for the economy and interest rates. (AP)

AGENDA

- I. DEFINITION OF A "POLITICAL" TRIP
- II. ALLOCATION OF EXPENSES ASSOCIATED WITH POLITICAL TRAVEL
- III. ROLES OF VARIOUS OFFICES IN COORDINATING POLITICAL TRAVEL
 - A. Campaign Liaison
 - B. Scheduling
 - C. Advance
 - D. Legal
 - E. Military
 - F. Press
 - G. Administrative Office

THE WHITE HOUSE

WASHINGTON

January 30, 1984

MEMORANDUM FOR MICHAEL K. DEEVER
ASSISTANT TO THE PRESIDENT AND
DEPUTY CHIEF OF STAFF

FROM: SHERRIE M. COOKSEY ^{smc}
ASSOCIATE COUNSEL TO THE PRESIDENT

SUBJECT: Agenda for January 31 Meeting on Political Travel

Attached, per your request (as relayed through Bill Sittmann), is a proposed agenda for tomorrow's political travel meeting. Set forth below is a summary of the activities undertaken to date in coordination of the President's 1984 political travel and a brief discussion of each proposed agenda item.

SUMMARY OF POLITICAL TRAVEL COORDINATION ACTIVITIES TO DATE

In anticipation of the President's role as a candidate in 1984, Bill Henkel, Fred Ryan, John Rogers, Theresa Elmore, Margaret Tutwiler and I have met on several occasions to discuss among ourselves and with Reagan-Bush '84 campaign officials (Bay Buchanan, Ron Robertson, Sarah Long and Dan Morris) the appropriate method of payment and coordination of Presidential campaign travel. The system we developed was based in large part on the memoranda circulated by Fred Fielding on permissible political activity by White House staff and guidelines for allocation of expenses associated with Presidential political travel. (Copies of those memoranda are attached at Tab A for your information.) This system was tested in the President's trip to Atlanta and worked reasonably well.

DISCUSSION OF PROPOSED AGENDA ITEMS

I. Definition of a "Political" Trip

We should look to the nature of the audience or event and the text of the President's speech to determine whether a particular appearance is "political". Appearances by the President at political meetings, rallies or fundraisers are obviously "political". Additionally, appearances before what would otherwise be "non-partisan" or official events may become "political" if the President's speech contains "advocacy" statements about his campaign.

II. Allocation of Expenses Associated with Political Travel

Pursuant to Federal Election Commission ("FEC") regulations, all political appearances by a candidate in a Presidential election year are presumed to be "campaign-related", and, as a result, the candidate's authorized campaign committee is required to pay for all travel related to that appearance.

The general method for allocation of official and campaign-related travel costs is as follows:

1. If any campaign activity (other than "incidental contacts") is conducted at a stop (i.e., city), that stop shall be identified as campaign-related and, in general, all costs associated with it must be paid by the President's campaign committee.

2. For a trip that includes campaign-related and non-campaign related stops, that portion of the trip allocable to campaign activity must be paid by the campaign committee.

Such portion shall be determined by using the "hypothetical trip formula": calculate what the trip would have cost from the point of origin to the first campaign-related stop and from that stop to each subsequent campaign-related stop, back to the point of origin.

For use of Air Force 1 or other Government aircraft, FEC regulations require the campaign committee to pay the appropriate Government entity the first class commercial airfare plus \$1 (in the case of travel to a city served by regularly scheduled commercial service) for each passenger designated as "political" on Air Force 1; and the proportional commercial charter rate plus \$1 for each passenger designated as "political" on Air Force 1 when travelling to a city not served by regularly scheduled commercial service. The same rules apply to the use of military helicopters.

Media traveling on Air Force 1 or 2 should reimburse the Government for their air travel by paying the first class air fare plus the cost of inflight services for any such trips they make.

If Government cars are used for campaign-related travel, the Government shall be reimbursed the commercial rental cost of such automobiles. This means that for motorcades to political events the campaign will reimburse the Government for the President's limousine and any cars in the motorcade not related to the security of the President (e.g., staff cars).

III. Roles of Various Offices in Coordinating Political Travel

A. Campaign Liaison

As you know, Margaret Tutwiler is primarily responsible for White House liaison with the campaign. In that capacity, Margaret keeps Ed Rollins informed of projected Presidential travel plans and keeps you and others informed of any campaign requests for Presidential travel.

B. Scheduling

Fred Ryan's office is responsible for routing all requests for Presidential campaign related appearances to the campaign for response and review. Once it is determined that the President will make a political appearance, Fred then advises Sarah Long that the event has been approved, and coordinates the schedule of that event with Sarah. Sarah will make the necessary telephone calls to the political officials in the field and keep Fred informed of the shaping of this event and of any questions relating to it.

C. Advance

Although a campaign advance office has been established, White House advance staff may be used for purely political events. If White House advance officials do purely political advances, all expenses associated with their travel and lodgings for that advance must be paid by the campaign committee. If military transport is being used for travel by WHCA and other officials to travel on a pre-advance trip, campaign advance people may travel on that aircraft. However, the campaign will be required to reimburse the Government for the first class airfare plus \$1 for each advancement so travelling.

Campaign advance personnel should not be used for official advances.

D. Legal

Questions relating to the characterization of a particular event as "political" or "official" should be reviewed by the Counsel's Office, as should all questions relating to the appropriate method of payment for a particular cost. Any questions relating to permissible political activities by White House staff should also be reviewed by the Counsel's Office.

E. Military Office

The Military Office will continue to provide transportation and communications support to the President as Commander-in-Chief. For all such support that is used for political trips the Military Office must provide to the Administrative Office an estimate of the costs incurred so that the campaign committee may be properly billed.

F. Press Office

Whenever Jim Lake travels on Presidential trips, the campaign must be billed for his airfare and lodging expenses. All press inquiries on campaign issues should be referred to Lake.

G. Administrative Office

The Administrative Office is responsible for maintaining a "trip file" on all travel by the President. Because the Administrative Office is responsible for the issuance of approved travel vouchers and ensuring that the campaign committee is billed for all campaign related expenses, its trip file will contain much of the same information that will be included in the campaign committee's travel expense files. The Administrative Office's trip file will be reviewed by the GAO for an analysis of the use of official funds for Presidential travel. Accordingly, there must be close coordination among all White House offices involved in Presidential political travel and the Administrative Office so that our official trip files will be complete.

Attachments

November 5, 1983

good memo
discuss with JATS
file

MEMORANDUM FOR ED ROLLINS
LEE ATWATER

FROM: MIKE McMANUS *Mike McManus*

SUBJECT: Campaign - Surrogates, Advance and
Scheduling

At your suggestion, I have reviewed the Surrogate, Advance and Scheduling operation from past campaigns and spoken with a number of people previously involved. There has never been any question that these three areas are an important part of any campaign and probably even more so for that of an incumbent President. A number of things are critically important to the success of such a program: Top Level Involvement and Commitment, Close Coordination with other Offices, regular Planning Meetings, and Liaison and Pollster Involvement.

Recommendation - I'm convinced that we need to develop and use well certain areas of expertise which should be all contained in specific offices -- i.e. all scheduling in scheduling, all press in press and all briefing materials in communications. In the past, there have been surrogate operations which have been called Surrogate Scheduling Operations because they not only worked directly with the surrogates but also scheduled their events, wrote some briefing material, set up press opportunities and delivered their tickets. I think that's a mistake. The Surrogate Operation is Bodies, Communication and Coordination. We will need a large number of surrogates and their care and feeding will be a full time job.

Going through each office, the job description would look like this:

Surrogate Office - The function of this office is to get and keep surrogates, develop relationships with each surrogate's scheduler, get commitments of open time in advance, develop new surrogates, and coordinate the flow of information and materials (created by the experts) back to the surrogates. The Office would contain in addition to a Director, three or four people who had a significant number of surrogates assigned to each. It would also have either consultants or full time people to develop new surrogates in specialized areas, sports, entertainment and various ethnic groups. This office should be developing surrogate lists as soon as possible and put together a draft high level letter to the State Chairmen asking for surrogate recommendations in categories such as women, hispanics, blacks, small business, private sector generally, sports, farm and elected officials on all levels. Coordination with developed White House, RNC and other lists is also important.

Scheduling Office - The Scheduling Office should be responsible for all scheduling of a campaign nature from the President to the last surrogate. It is only by centralizing this effort that we assure coordination with the President's schedule and also assure that there is coordination among surrogates in primary states and key targeted states. The scheduling office should have a continually updated national chart to show Presidential and surrogate planning and to help coordinate consistent themes over agreed upon periods of time. The recommendation is that the Director of Scheduling be brought on board on December 1st to start putting together an inventory of events in areas directed by you, to direct the purchase of computer equipment compatible with the White House and to contact RPD's and others where possible for additional scheduling input. This would be intended to allow you to hit the ground on January 1st with events ready for discussion and perhaps already scheduled.

Advance Office - This office would, as in other campaigns be the advance support center for all events from Presidential through surrogate to the extent necessary. There is an advance seminar scheduled the first week in December to train approximately 35 new volunteer advance people. While I would suggest bringing five or six full time people on full time as required my suggestion would be to use the volunteer network on a regional basis as much as possible. The advance office should also be used as a source of trip ideas where we know we want to go into a particular region but are not sure what exactly we might want to do. Advance surveys were at times invaluable in the 72 and 76 campaigns.

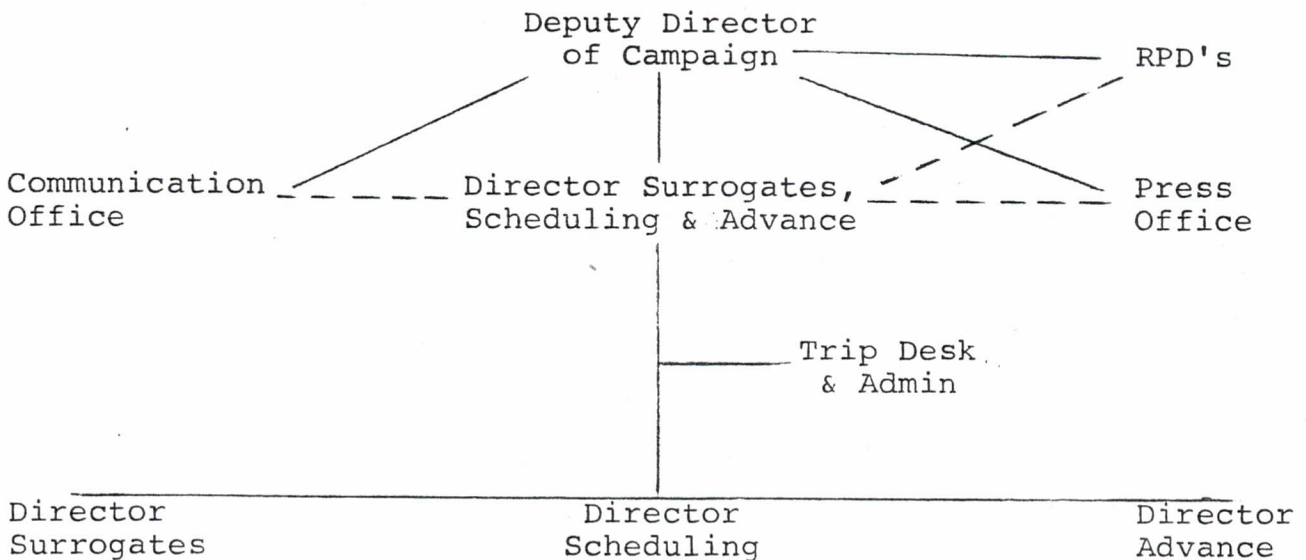
Although not directly part of the area you asked me to address, there are two other offices which are directly and importantly connected with this operation. Since Jim Lake would be involved with both to some extent I have discussed the following with him and believe he concurs.

Press Office - This office needs to provide a centralized base of expert support for the Surrogate, Scheduling and Advance Offices. In the past, the surrogate office has had their own internal press support. To me this means a second team with second team impact. Surrogates need well orchestrated press support, including setting up interviews, which necessitates expert top level help and coordination. The Press Office also needs to be involved when we are trying to promote a consistent theme in different parts of the country with or without Presidential involvement.

Communications Office - The campaign communications office needs to be the centralized control point for the production of surrogate briefing and speaking materials. Consistency and a kind of quality control should be the watchwords here. This office needs to coordinate closely with the latest material produced by the White House. The Darman, Gergen and Fuller

operations need to be involved. A consistent accurate up-to-date message is the key product. The K I S S theory (keep it simple stupid) applies here. Materials need to be quality but usable by people who are very busy doing alot of other things - the surrogate. We should not have a duplicative second team producing its own material in the surrogate office. It's a risk we don't want to take. I've asked Dave Gergen to have his people start preparing some briefing material with short speech inserts on Women, the Economy, Inflation, Small Business and Hispanics to start. If we can have some product ready to go we can miss the time we would loose during the start up of the campaign communications office.

An organization chart consistent with this proposal would look something like this:



As mentioned above the key to the success of the program is communication and letting the experts do their jobs to assure consistency.

Operating Plan - Top level involvement is critical here throughout the program. The President himself needs to set the tone for the importance of the surrogate program by announcing the importance of Cabinet cooperation in a Cabinet meeting. This should be followed almost immediately by a letter introducing the surrogate office person who will contact the Cabinet members office for date commitments in advance. This letter needs to come from Senator Laxalt or Ed Rollins. The President will have to make other calls to important surrogates. The same is true in the internal organization top level participation is mandatory.

I would propose you consider operating in the following manner:

Ed or Lee should have regular meetings with at least the Director Press, Director Communications, and the Director Surrogates, Scheduling and Advance. These meetings should lay out as long

range a plan as possible with more specifics added at later meetings. The plan could then be implemented as follows:

- The Director Surrogate, Scheduling & Advance would meet with his group to direct the Scheduler to list events known in states which are part of the plan, that office would also look for creative events in the designated areas.
- The Surrogate office would at the same time establish surrogate availability. Commitments of surrogates to specific events would take place at the next meeting.
- Advance assignments would be made depending upon the level of the surrogate or the commitment of several surrogates to the same area, or the need to have someone in a particular area to create events.
- Communications would then be charged with the responsibility to create briefing updates or speech material consistent with the events or themes.
- The Press office would establish press coverage of the event and perhaps more importantly press opportunities and interviews before and after the event.
- The trip desk would prepare a schedule for the Surrogate, get a plane ticket and handle other administrative details.

All of this information and material should get to the surrogate only through the surrogate office contact for that surrogate.

I would suggest a control room set up where there could be a coded map of the country so you could tell at any time where the President is and where surrogates are operating. The control room would also coordinate upcoming theme weeks or blitzers.

Part of the operating plan needs to include the regular search for surrogates. Several people should be brought on to look for special group surrogates. In addition, some attention needs to be directed to delivering "truth squad" or "attack" surrogates.

Regular meetings should be established with this operating group and the pollsters and White House liaison. Once a week is probably not too often.

Again, top level involvement, using the experts, and constant coordination and communication are the keys.

Personnel - I have several suggestions for you in the personnel area:

Director Surrogate, Scheduling, and Advance - I think we should talk Dan Morris into this. He was one of our best advance people, is extremely creative, and proved himself to be a good detail and administrative person at the Summit. He's been involved in a number of previous campaigns, knows the drill and knows the players.

Director of Scheduling - Sarah Long. She is now Deputy Director in the White House Office and has been doing an impressive job. We need someone who knows the White House system and players. I think she is ready to run her own show.

Director of Surrogates - I think there are a number of options here and you guys ought to decide who you'd be most comfortable with. I think Grey Terry could do this job. He's got good interpersonal skills and could run this operation. Tish Maher was the number two person in this office in 1980 to Hendriks but many people I've talked to felt she really ran the show. She'd be willing to do it again. Karen Hart might be willing. She has expressed an interest, knows the players, especially Cabinet but I've never seen her run anything like this. That's not to say she couldn't do it though. A number of people suggested Bob Turnbull, at SBA, might be willing. I don't know him well.

Director of Advance - Grey Terry if he isn't Surrogates or Jim Kuhn who is recently married and I understand would like to travel less than required in Presidential Advance.

Trip Desk & Administrative - Marcy Head would be good here as she knows the White House system and campaign people and works well with all.

Start Up Plan - A couple of thoughts for start up:

- There's still a lot of information available on programs like this, surrogates and other related ideas. I'd look at the RNC program book, talk to Warren Hendriks, Dave Parker and Ron Walker.
- I'd bring Sarah Long on board on December 1 and probably the surrogate person as well. Sarah needs to build an inventory of events in primary states and key states and develop computer compatibility.
- The Surrogate person should start lining up elected officials and other surrogates to come out in support of the President's announcement and it's importance. They should also be lined up to support and follow up on the State of the Union Address.
- In general planning terms we know we will need spokespersons in Democratic primary states from January through March and early April. This can be set up to some extent now.
- We also will need to start working key targeted states as soon as possible.
- I would think the President would do a few purely political rallies during the February, March, April period. We should look for good opportunities now and decide on surrogate support to prolong the news effect or to compliment the President's efforts in other parts of the country.
- The President will be out of the country in April to China and in June to the Summit in London. We should have some plan for what we want to do domestically during this time.
- What do we want to do during the Democratic Convention.
- After the Olympics there will be a number of new national heroes. What are we going to do now to line them up.
- At the Convention we will need a variety of speakers: young, female, old, hispanics, black, etc. - we should be carefully evaluating our surrogates from the beginning to get the right people.

PROPOSAL
FOR THE FUNCTION AND ORGANIZATION
OF THE
CAMPAIGN SCHEDULING OFFICE

OBJECTIVE

The mission of the Campaign Scheduling Office is to target opportunities, in line with current re-election campaign strategy, for the President, Vice-President, and upper-level surrogates to appear in critical states.

FUNCTION

The Campaign Scheduling Office will be responsible for:

- o First review of all campaign-related invitations. Invitations received by the campaign will come directly to the Scheduling office for first review. Campaign-related invitations received at the White House will be immediately forwarded to the campaign scheduling office for first review.
- o Recommendation of possible events for further consideration. Invitations carried over for further review of scheduling office recommendations will be considered at weekly meetings, involving Directors from Scheduling, Advance and Surrogates.

If recommendation is made for Presidential involvement from the scheduling meeting, invitation will be carried forward for further review to the Deputy Director and/or Director of the Campaign. If recommendation is made to accept by the Deputy Director or Director, campaign scheduling office will contact WH Scheduling regarding possible acceptance and date. No scheduling proposal will be sent to the Presidential or Vice-Presidential Scheduling Offices without prior approval from either the Deputy Director or the Director, unless they direct otherwise.

If recommendation is made for Vice-Presidential involvement, following the same approval process as for Presidential request, the Campaign Scheduling office will contact VP Scheduling regarding possible acceptance.

If recommendation is made for surrogate involvement, invitation is passed on to the Surrogate Office. Scheduling will make requests for particular surrogates in some instances, subject to their availability. Requests from surrogates for events will be forwarded to Scheduling from the Surrogate Office, with any recommendations.

o All correspondence dealing with campaign-related scheduling.
Campaign scheduling will be responsible for responding to all invitations, including regrets and acceptances. Invitations received will be logged in on computer for ease in tracking and future reference. Once an event is accepted and placed on the schedule, all supporting paperwork will be sent with a "set-up memo" to the Campaign Advance Office for handling.

Campaign Scheduling will also be responsible for dealing with all inquiries regarding status of invitations. By making the Scheduling office the point of contact, Scheduling becomes the "bad guy" when invitations are regretted, rather Field Staff.

o Creative Scheduling, Long-Range Planning and Research
Campaign scheduling will be responsible for proposing additional created events for the President, Vice-President and surrogates. Sources within the campaign, such as RPD's, will be contacted regularly by the scheduling office regarding possible ideas and needs within their regions. To aid in this function, it's important that the scheduling director have access to the President's long-range schedule. If he is already scheduled for an official event in a particular state, the campaign can begin to look for possible campaign-related events that could be included.

In any campaign, the candidate's time is the most valuable commodity. This becomes even more important when the candidate is an incumbent President running for re-election. Therefore, the office responsible for recommending how that time should be allocated needs to be in a position of high visibility in the Campaign.

As we have seen from experience with the White House Scheduling Office, the Director of Campaign Scheduling should be included in critical strategy meetings that would have a bearing on when and where we move the President. Knowing the background of a decision is as important as knowing what that final decision is. The Campaign Scheduling Office cannot hope to function efficiently if it is kept in the dark until the last minute.

In order to most effectively schedule the campaign appearances of the President, Vice-President and surrogates, the Director of Campaign Scheduling needs to know, as decisions are made, of what states are critical, and when appearances are needed; what current themes are to be stressed; trends indicated by polling data; special groups to be targeted; etc. The Director of Campaign Scheduling needs to have access to the Deputy Director of the Campaign, should her immediate superior not be available.

In addition to access to information, the Campaign Scheduling Office also needs to be physically located in a high visibility place within the Campaign Office structure. Physical proximity could probably be half the battle in keeping up to date on current developments.

High level computer capability is essential for scheduling, and each staff person should have a terminal or self-contained unit, if possible. The lack of computer capability slows down operations in the White House Scheduling Office, and there will be less time to react, and fewer staff to jump in the Campaign Scheduling Office.

A computer tracking system would be set up for invitations which would allow staff members to search for a particular invitation by the date of the event, name of the host individual or group, location, and type of event. This would save an incredible amount of time in responding to status requests on invitations, and in searching for an event in a particular state, or on a particular date.

The Campaign Scheduling Office will be doing all the production of scheduling correspondence, and computer capability to handle this is another requirement. Computer capability is not a place to scrimp in the Scheduling Office budget.

STAFF

Director of Campaign Scheduling -- \$37,000

The Director of Scheduling will report to the Director of Advance and Scheduling, and work closely with the campaign surrogate and advance operations. The Director should move into the campaign as soon as possible -- suggest December 1st.

Responsibilities include:

- o Supervision of Campaign Scheduling Staff
- o Liaison with the White House Scheduling Office and various campaign divisions, such as Regional Political Directors, Press Office, etc.
- o Attending weekly scheduling meetings with representative from surrogate, advance, and press.
- o Long-range schedule planning and schedule proposals.
- o Review and recommendations on all campaign scheduling invitations and proposals.

Office Manager -- \$23,000-\$25,000

This staff member will act as assistant to the director of scheduling, and should be hired as soon as possible in order to begin setting up office organization.

Responsibilities include:

- o Answering phones; opening and distributing mail
- o Logging invitations into the computer system and tracking their status
- o Limited general typing
- o Office management (supplies and equipment, and other administrative duties)
- o Correspondence, until correspondence assistant hired.

Correspondence Assistant -- \$20,000

As the mail begins to increase, an additional person should be hired to deal strictly with correspondence -- suggest January or early February, 1984. Correspondence is one of the most important functions of this office. The timing and type of response to invitations we regret can mean the difference between a disappointed, but understanding, supporter or candidate, and a disgruntled one.

Responsibilities include:

- o Responding to invitations, either by standard computer response, or by drafting special letters.
- o Maintaining correspondence files
- o Dealing with the public regarding the status of invitations

CREATIVE SCHEDULER -- \$25,000

This position could be filled around late spring.

Responsibilities include:

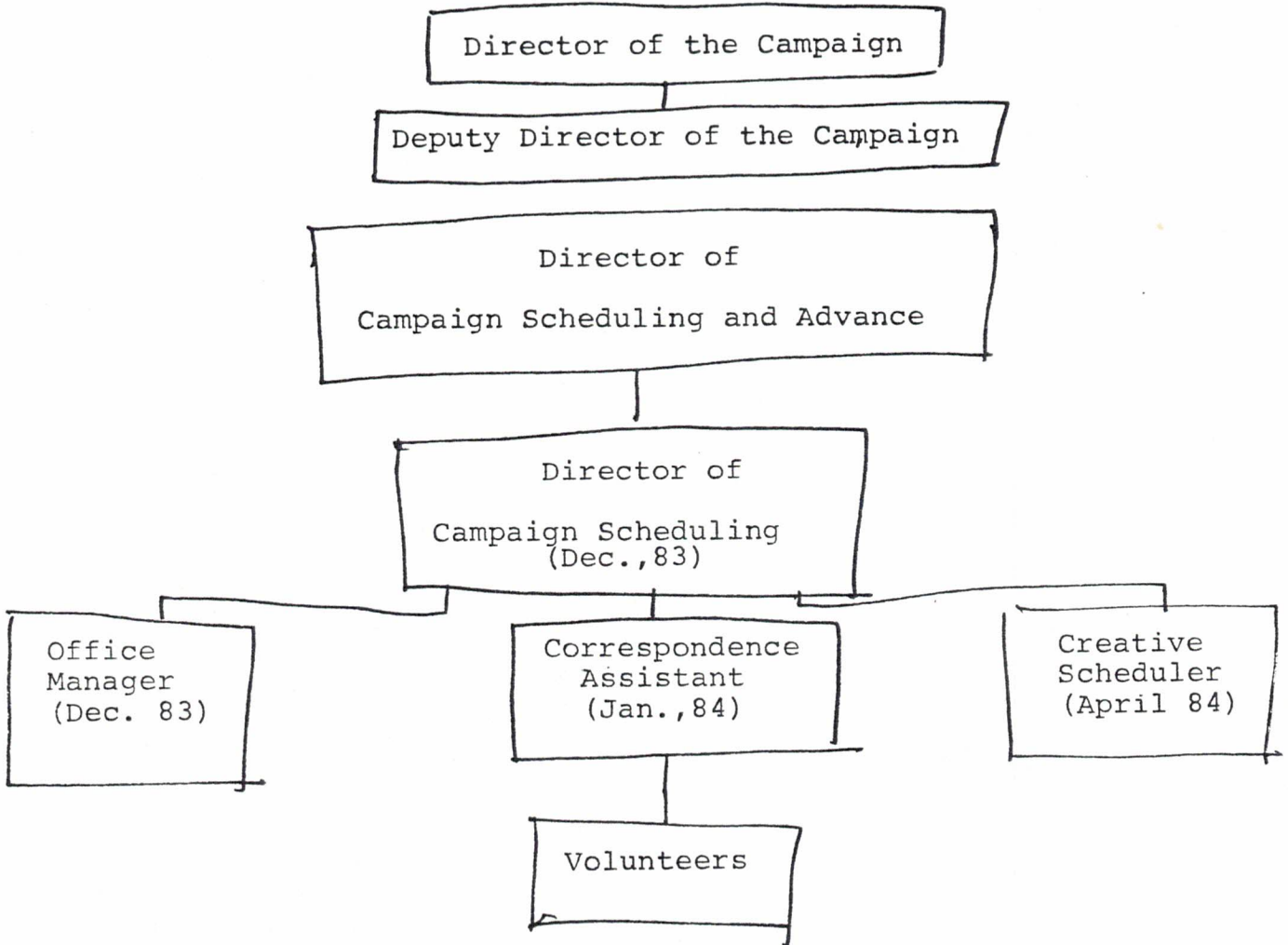
- o Maintaining state-by-state files of possible future events for President, Vice-President and surrogates.
- o Assisting director in review of invitations, if necessary
- o Maintaining long-term schedules of future events
- o Submitting creative scheduling ideas to director for consideration
- o Assisting with correspondence when necessary
- o Research of proposed scheduling ideas

VOLUNTEERS

Volunteers should be available to assist with correspondence if incoming mail increases drastically later in the campaign. In order to assist in volunteer recruitment, I would like your authorization to approach some of the better volunteers at the R.N.C. about the possibility of moving to the Campaign.

CAMPAIGN SCHEDULING OFFICE

ORGANIZATION CHART



CAMPAIGN SCHEDULING OFFICE

FLOW CHART

