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2007-0753-F

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2007-0753-F

# FOIA MARKER

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**Record Group/Collection:** George H.W. Bush Presidential Records  
**Collection/Office of Origin:** Advance, White House Office of  
**Series:** Hazelrigg, Peggy, Files  
**Subseries:**

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**OA/ID Number:** 06986  
**Folder ID Number:** 06986-001

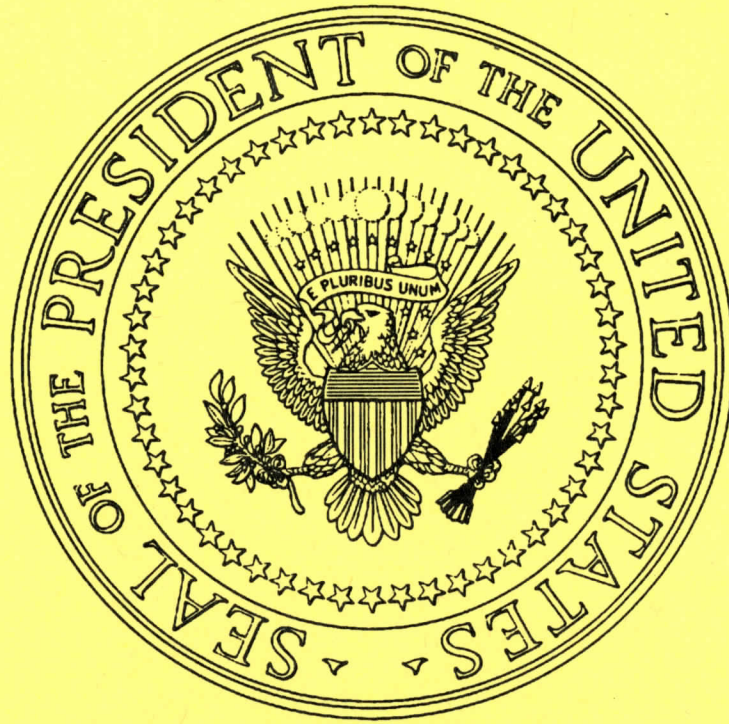
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**Folder Title:**  
Binder: Assistant Director for Trip Coordination Manual

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Stack:	Row:	Section:	Shelf:	Position:
<b>G</b>	<b>9</b>	<b>18</b>	<b>1</b>	<b>3</b>

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**ASSISTANT DIRECTOR FOR  
TRIP COORDINATION  
MANUAL**

**Office of Presidential Advance**

THE WHITE HOUSE  
WASHINGTON

February 1990

MEMORANDUM FOR ADMINISTRATIVE CONTACTS

FROM: ANITA C. BEVACQUA  
DIRECTOR, WHITE HOUSE PERSONNEL

SUBJECT: CHECK-OUT PROCEDURES FOR WHITE HOUSE OFFICE STAFF

What the Administrative Contact should do:

To arrange for departure of an employee from the White House Staff obtain the Resignation Form and Check-out Form from the Personnel Office and have the departing employee complete the forms and return them to the White House Personnel Office.

What an employee should do:

- 1) Notify the Personnel Office at least one week before departure.
- 2) Complete the resignation form and return it to the Personnel Office, as soon as your exact departure date is known; but no later than three days before your departure.
- 3) Complete the Check-out form and return it to the White House Personnel Office no later than your last day on duty. This clearance form provides guidelines for you to notify various offices which need information about your departure. PLEASE NOTE: Your final paycheck will be rerouted to the White House Personnel Office for final clearance. Your final paycheck will be sent to you only after your completed Check-out Form has been returned to White House Personnel.
- 4) You may wish to consider completion of a form for Refund of Retirement Deductions (if they were withheld from your pay and you are not going to another Federal Agency). These forms will be furnished separately to each individual based on their type of retirement coverage (CSRS or FERS).
- 5) If you are enrolled in the Thrift Savings Plan and you are not going to another Federal Agency, you will need to obtain the "Withdrawing Your TSP Account Balance" booklet, which outlines your TSP benefits and withdrawal options.

Please direct all questions regarding departures from the White House Office Staff to the Personnel Office, Room 6, OEOP (x2260).

# Withdrawal/Redaction Sheet

## (George Bush Library)

Document No. and Type	Subject/Title of Document	Date	Restriction	Class.
01. Form Letter	Leo Tomeu to Personnel Office Re: Resignation (1 pp.)	3/30/92	(b)(6)	

**Collection:**

**Record Group:** Bush Presidential Records  
**Office:** Advance, Office of  
**Series:** Hazelrigg, Margaret J. (Peggy), Files  
**Subseries:**  
**WHORM Cat.:**  
**File Location:** Binder: Assistant Director for Trip Coordination Manual

<b>Date Closed:</b> 8/7/2007	<b>OA/ID Number:</b> 06986-001
<b>FOIA/SYS Case #:</b> 2007-0753-F	<b>Appeal Case #:</b>
<b>Re-review Case #:</b>	<b>Appeal Disposition:</b>
<b>P-2/P-5 Review Case #:</b>	<b>Disposition Date:</b>
<b>AR Case #:</b>	<b>MR Case #:</b>
<b>AR Disposition:</b>	<b>MR Disposition:</b>
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### RESTRICTION CODES

**Presidential Records Act - [44 U.S.C. 2204(a)]**

- P-1 National Security Classified Information [(a)(1) of the PRA]
- P-2 Relating to the appointment to Federal office [(a)(2) of the PRA]
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C. Closed in accordance with restrictions contained in donor's deed of gift.

PRM. Removed as a personal record misfile.

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**DUTIES OF ASSISTANT DIRECTOR FOR TRIP COORDINATION**

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- B. Gift Packets
- C. Personnel
  - 1. Timesheets
  - 2. Vacation schedules
  - 3. Parking Passes
  - 4. Terminating Employees
  - 5. New Employees
  - 6. Employees Transferring
  - 7. Interns

Sample Forms:

- Parking Form
- Presidential Gift Request Form

Sample Memos for New Employees:

- Notice of New Employee
- Request for Carpet, Radio/Pager, Commission Book
- Request for Suite Key

**II. TRIP COORDINATION**

- A. Trip Coordinators
- B. Hotels

**III. EXECUTIVE ASSISTANT TO THE DIRECTOR OF ADVANCE**

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- A. Kennebunkport
- B. White House Photographs and Inscriptions

Check Lists

THE WHITE HOUSE

WASHINGTON

**DUTIES OF THE  
ASSISTANT DIRECTOR OF PRESIDENTIAL ADVANCE**

**I. ADMINISTRATION**

**INTRODUCTION**

The administrative contact serves as office manager and is responsible for the daily operations of the office; personnel management; and accounting policy and procedures.

The administrative contact works extensively with White House Administration, Room 1 (ext. 2500) and White House Personnel, Room 6 (ext. 2260). The admin. contact approves all payments made for all White House advance team travel, including hotel room, rental car, miscellaneous costs, and per diem.

**A. ACCOUNTING PROCEDURES**

The administrative contact authorizes all payments made on behalf of this office. This includes the following:

- \* Approving and signing all travel authorizations and travel vouchers for advance travel. Always check with the Deputy Director assigning the advance volunteers to determine their status, that is, whether or not advance reps. may receive per diem or if we are just paying for hotel room, etc. In many instances, local volunteers may receive per diem but they are not authorized for hotel accommodations.
- \* Booking hotels and negotiating hotel rack rates; and
- \* Approving unusual expenses for advances (extra hotel rooms, additional rental cars, etc.)

**B. GIFT PACKETS**

A packet of 24 trinkets is provided for each trip, consisting of cufflinks, tie bars, stick pins and pens. Fill out and submit a Gift Request form to Room 1. Contact: Gina Parodi, Room 1, ext. 2500.

**C. PERSONNEL**

**1. Timesheets**

Timesheets are due every other Friday  
Paychecks are distributed alternating Fridays.  
Contact: White House Personnel, Room 6, ext. 2260.

**2. Vacation schedules**

Vacation schedules must be coordinated for all staff with the approval of the Director of Advance.

**3. Parking Passes**

Each time an employee joins the staff, fill out a form and submit it to Betty Ubbens, Room 1, ext. 2500. Monthly stickers are distributed on the first of each month. The two special assistants have permanent parking spaces on West Executive Avenue and do not need monthly stickers.

**4. Terminating Employees**

Below is a checklist for departing staff:

\* **Submit a Memo to the Assistant to the President for Administration** from the Director of Presidential Advance. The memo should include name of terminating employee, former position, and date of departure.

\* **Instruct Employee to report to White House Personnel** -- Terminating employees should report to White House Personnel for check-out and resignation forms.

\* **Update the following forms:**  
- staff roster  
- staff addresses list  
- intercom listing (at each desk)

**5. New Employees**

\* **Submit a Memo to the Assistant to the President for Administration** from the Director of Presidential Advance. Include name of employee, position, starting date, and annual salary.

\* **Submit a Memo to Deputy Assistant to the President for Administration** from yourself. Request Carpet access; a radio and a pager. For advance representatives, also request a commission book.

\* **Submit the following forms to Personnel:**  
- Request for Personnel Action (white)  
- Supplemental Information Sheet (blue)

NOTE: These two forms must be submitted for employee to be placed on the White House access list. Submit on employee's first day.

\* **Instruct Employee to submit the following form to Security:**

- Security Form 86

Contacts: Personnel - Mary Carroll, ext. 2260  
Security - Nancy Gemmell, ext. 2345

\* **Give the following items to a new employee:**

- New Employee Book  
- Advance Representatives Directory  
- Hotel Directory  
- Staff Roster and Addresses  
- Lead Pack (if an advance lead)

6. **Employees Transferring within the White House**  
For employees transferring to an office within the White House, send a memo to the Assistant to the President for Administration from the Director of Presidential Advance alerting him to the change in staffing. Employee must turn in their key to TSD/USSS and parking pass to Room 1.

7. **Interns**

The Advance Office has four slots for interns, hired by the Assistant Director. The Receptionist manual at the front desk and the New Intern Handbook outline the interns' duties. The White House intern coordinator is Shara Castle, Room 100, ext. 6266, who is responsible for gathering and distributing resumes, intern programs and all intern paperwork.

**D. PERSONNEL**

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# PARKING CHANGES

ADD CHANGE DELETE

Date of Transaction \_\_\_\_\_ (All Transactions)

Permit Number \_\_\_\_\_ (Change and Delete only)

Last Name \_\_\_\_\_ (All Transactions)

(If a change, complete only items to be changed)

First Name \_\_\_\_\_ Last Name \_\_\_\_\_

Room and Building 185 1/2 090B

Office EOP / PRES. ADVANCE Office Code \_\_\_\_\_

Parking Area (circle one)

B-NEOB

C-Seventeenth Street

E-Ellipse

I-South Court

J-Jackson Place

S-State Place

W-West Executive Drive (Space Number \_\_\_\_\_ )

H-Hamilton Place

N-North Court (Space Number \_\_\_\_\_ )

F-First Lady (Space Number \_\_\_\_\_ )


**SAMPLE**

Approved by: \_\_\_\_\_

Date \_\_\_\_\_

PLEASE PRINT ALL INFORMATION - THANK YOU

**THE WHITE HOUSE  
PRESIDENTIAL GIFT REQUEST FORM**

Requested By: Peggy Hazelrigg		
Office of: Presidential Advance	Extension: 7565	Room No. 185½
Date Requested: 2/7/91	Date Needed: 2/8/91	
Authorizing Signature: 		Date: 2-7-91

**PURPOSE**

Event:	Trip To: Kennebunkport, Maine
Other: (specify)	

**ITEMS REQUESTED**

ITEMS REQUESTED: One Trinket Pack		
SPECIAL INSTRUCTIONS: (i.e. gift wrap, box for travel, enclosure)		
Deliver To:	Room No.	Extension:

SAMPLE

**ADMINISTRATIVE OFFICE USE ONLY**

Date Order Filled:	Date Delivered:	
Approved:	Date:	Input:

**THE WHITE HOUSE  
PRESIDENTIAL GIFT REQUEST FORM**

Requested By:		
Office of:	Extension:	Room No.
Date Requested:	Date Needed:	
<b>Authorizing Signature:</b>		Date:

**PURPOSE**

Event:	Trip To:
Other: <i>(specify)</i>	

**ITEMS REQUESTED**

ITEMS REQUESTED:		
SPECIAL INSTRUCTIONS: <i>(i.e. gift wrap, box for travel, enclosure)</i>		
Deliver To:	Room No.	Extension:

**ADMINISTRATIVE OFFICE USE ONLY**

Date Order Filled:	Date Delivered:	
Approved:	Date:	Input:

**Office Copy**

**SAMPLE MEMO: NEW EMPLOYEE**

April 2, 1991

MEMORANDUM FOR PAUL BATEMAN

FROM: JAY PARMER

SUBJECT: **PERSONNEL**

(name) is joining the Office of Presidential Advance as a lead advance representative at an annual salary of \$xx,xxx. (name) replaces (old name).

(name)'s start date is (date).

Thank you.

cc: Andy Card  
Sig Rogich

**SAMPLE MEMO: NEW EMPLOYEE REQUEST FOR CARPET; RADIO  
& PAGER; COMMISSION BOOK**

April 2, 1991

MEMORANDUM FOR ROSE ZAMARIA

FROM: PEGGY HAZELRIGG

SUBJECT: **NEW PERSONNEL**

Brian Montgomery joined the Presidential Advance Office as a press advance representative as of June 18, 1990.

Please place Brian on the access list for the use of Carpet; and authorize issuance of radio and pager (WHCA Ops) and a commission book for his use (USSS).

Thank you.

## **II. TRIP COORDINATION**

### **A. TRIP COORDINATORS**

The Assistant Director for Trip Coordination is responsible for overseeing trip coordination, including managing preparation, production and general policies and procedures for Presidential schedules and related trip documents. Responsibilities also include general personnel management of the trip coordinator staff, including hiring, payment schedules and vacation schedules. The Assistant Director also is responsible for planning and managing the trip coordinators schedules and assignments; managing production of schedules for surveys, pre-advances, advances and Presidential trips; determining pre-advance assignments with the staffer conducting the pre-advance; and serving as trip coordinator.

### **B. HOTELS**

It is important to develop and maintain active relationships and ongoing communications with key contacts in the the hotel industry. Most international and domestic hotel chains have national sales offices in the Washington, D.C., area, and all have someone assigned to attend to the needs of the White House. We also try to maintain good relations with local hotel contacts since we repeatedly visit their hotels for in-town events. Also, you determine hotels used for pre-advance and advance teams, White House staff, and Presidential overnights. This includes making initial reservations and negotiating rack rates. Once this is done, the trip coordinator can write the hotel letter and begin making arrangements with the hotel.

## **III. EXECUTIVE ASSISTANT TO THE DIRECTOR OF ADVANCE**

- Open and sort mail
- Provide liaison with White House staff
- Schedule appointments
- Perform special projects as needed

## **IV. SPECIAL PROJECTS**

### **A. KENNEBUNKPORT**

The Assistant Director is the chief point of contact with the staff hotel in Kennebunkport, the Nonantum Resort.

# Withdrawal/Redaction Sheet

## (George Bush Library)

Document No. and Type	Subject/Title of Document	Date	Restriction	Class.
02. Memo	Peggy Hazelrigg to USSS Re: Suite Key (1 pp.)	4/12/91	(b)(7)f	

**Collection:**

**Record Group:** Bush Presidential Records  
**Office:** Advance, Office of  
**Series:** Hazelrigg, Margaret J. (Peggy), Files  
**Subseries:**  
**WHORM Cat.:**  
**File Location:** Binder: Assistant Director for Trip Coordination Manual

<b>Date Closed:</b> 8/7/2007	<b>OA/ID Number:</b> 06986-001
<b>FOIA/SYS Case #:</b> 2007-0753-F	<b>Appeal Case #:</b>
<b>Re-review Case #:</b>	<b>Appeal Disposition:</b>
<b>P-2/P-5 Review Case #:</b>	<b>Disposition Date:</b>
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C. Closed in accordance with restrictions contained in donor's deed of gift.

PRM. Removed as a personal record misfile.

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**SAMPLE MEMO: NEW EMPLOYEE REQUEST FOR KEY**

April 2, 1991

MEMORANDUM FOR (b)(7)f  
USSS/TSD

FROM: PEGGY HAZELRIGG  
ASSISTANT DIRECTOR  
PRESIDENTIAL ADVANCE OFFICE

SUBJECT: SUITE KEY

Please issue a key for Room 185 1/2 in the OEOB to Brian D. Montgomery, a new member of our staff who has been issued a permanent pass.

Should you have any questions, we can be reached at ext. 7565.

Thank you.

# Withdrawal/Redaction Sheet (George Bush Library)

Document No. and Type	Subject/Title of Document	Date	Restriction	Class.
03. Manual	Re: Kennebunkport (1 pp.)	n.d.	(b)(7)(e), (b)(7)(f)	

**Collection:**

**Record Group:** Bush Presidential Records  
**Office:** Advance, Office of  
**Series:** Hazelrigg, Margaret J. (Peggy), Files  
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Responsibilities include reserving hotel rooms for White House staff and White House Military Office, and negotiating room rates. WHCA and [REDACTED] (b)(7)  
[REDACTED] (e)(f)  
(cf., Information Book on Kennebunkport, Maine.)

#### B. WHITE HOUSE PHOTOGRAPHS AND INSCRIPTIONS

Each Presidential visit generates photographs with various people from the local community who supported the trip. These are called photo opportunities or photo ops, for short and they are arranged by the lead advance at the airport, hotel and various sites during the visit. The lead advance is responsible for submitting a photo contact card to the White House Photo Office during the trip which specifies where the photos are to be sent. (See attached form.) The photo office then mails the photos directly to the contacts listed on the card usually within two weeks following the trip. Included with the photos is a form which gives instructions for having the photos inscribed.

If the local contact wants their photos inscribed, he/she returns the photos to the Advance Office for processing. A computer program (on the intern computer) is used to process and fill out the photo inscription forms. (NOTE: Under my instruction, the interns have traditionally been responsible for entering the information into the computer.) The forms are then turned in to Mary Ingalls in Correspondence, Room 94, ext. 7610. Instructions and tips are included in the Photo Book as a reference.

**Status of Photos:** If a group calls regarding the status of their photos from a recent Presidential trip, check with Marilyn Jacanin in the White House Photographer's Office, ext. 4050.

**Ordering Extra Photos:** If a group wants to order extra photos, they should write the White House Photo Editing Office, the White House, Washington, D.C. 20500. The Advance Office is not responsible for taking orders or for processing extra photos.

Domestic Check List

- \_\_\_\_\_ Determine hotel
- \_\_\_\_\_ Determine dates for pre-advance
- \_\_\_\_\_ Assign trip coordinator and distribute Trip Coordinator Assignment Sheet
- \_\_\_\_\_ Order trinkets

International Check List

- \_\_\_\_\_ Assign trip coordinator
  - determine deadlines for passports/visas with State Department  
Jeannie Bull, 647-7531
  - begin developing schedule
  - distribute memo to staff re: medical requirements, water, electricity, visa requirements
- \_\_\_\_\_ Check w/ Director re: dates of survey and/or pre-advance
- \_\_\_\_\_ Oversee preparation of briefing booklets for Lead Advance