

Originally Processed With FOIA(s):
2007-0753-F

FOIA Number:
2007-0753-F

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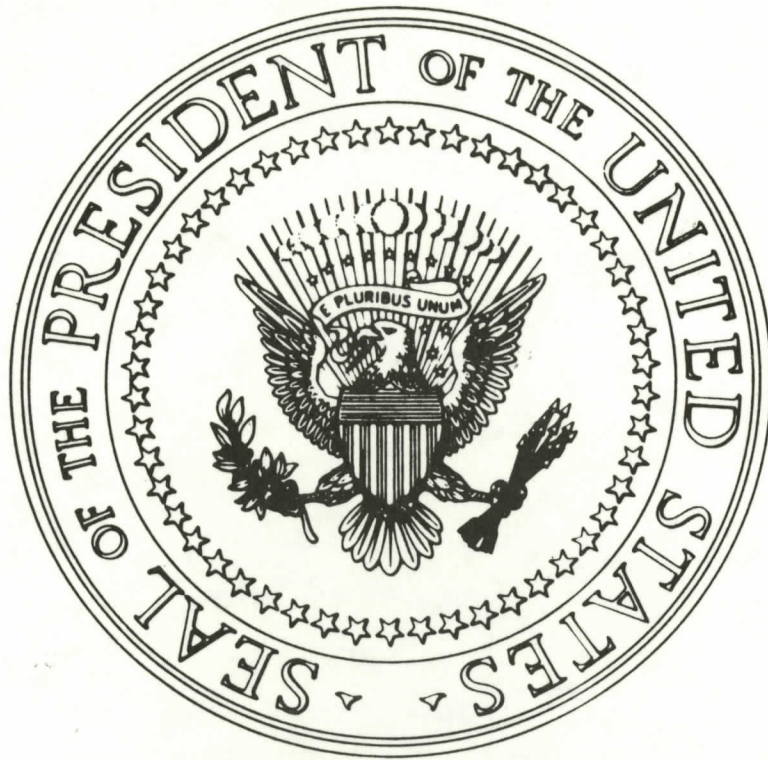
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OA/ID Number: 06987
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Folder Title:
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THE ADVANCE OFFICE OPERATIONS MANUAL

EVENT: _____
TIME: _____
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ADVANCE OPERATIONS MANUAL TABLE OF CONTENTS

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Introduction

The Advance Office Operations Manual has been designed to assist coordinating and controlling the respective activities and responsibilities of the Advance Office Staff. The Manual clearly delineates the responsibilities of each member of the Office during each phase of the preparation for a Presidential event.

The Manual is organized to be completed for ***each*** event. New sections and tabs should be started for each new trip or event. It will serve as a repository for most of the data and information necessary to plan and implement the event. Each member of the staff will be working from the same reference point facilitating communication and control.

CHAPTER ONE

INTRODUCTION

The Presidential Advance Office

The Presidential Advance Office is responsible for planning, organizing, leading and controlling the preparation of the President's public activities inside and outside The White House, and is accountable for the successful execution of those events.

The primary function of the Presidential Advance Office is to act as the information center for all the elements involved with implementing a Presidential event. Due to the number of interests concerned, failure to have a single source of direction would lead to duplication at the expense of efficiency and could potentially have a negative impact on the image of the Presidency. Straight, clear lines of direction and communication are therefore absolutely essential.

A. The Presidential Advance Office's Principal Accountabilities Are:

1. To assist in formulating Presidential trip concepts and event recommendations by maintaining a close relationship with the Presidential Scheduling and Appointments Director and by creating background information on potential events.
2. To originate detailed survey reports on potential Presidential events by conducting on-site surveys.
3. To coordinate the collection and dissemination of all information for approved Presidential events by a regular distribution system between the United States Secret Service, the Special Support Group, and the White House Press Office, Congressional Affairs, Political Affairs, Intergovernmental Affairs, Communications and Speechwriting Offices. Others will be included on a per trip basis. This coordination will extend to the State Department and the National Security Council on all international Presidential travel.

4. To conduct trip meetings with representatives of above agencies and offices to plan pre-advances, to establish advance teams, to define basic trip concepts and to direct the pre-advance team which determines the logistical requirements and the President's activities.
5. To prepare decision memorandums containing a proposed schedule with options and recommendations for the Deputy Chief of Staff.
6. To execute and control the advance delegating to the Lead Advanceman the overall responsibility and accountability for the event.
7. To prepare and distribute the President's personal schedule and the detailed staff schedule.
8. To determine the physical and logistical requirements for The White House Press Corps, to assist producing the press schedule and to devise coverage and staging recommendations to ensure appropriate media coverage of the Presidential events.
9. To devise continuous recruiting, training and proficiency programs to provide top caliber professionals as members of the Presidential advance team.
10. To ensure appropriate follow-up and acknowledgement to event contributors (thank you letters, photos, etc.).
11. To establish appropriate files, information and data resources on past events and additional information useful for future events.

B. Time Compression

The certitude of the time of a scheduled Presidential event makes time the Advance Office's and the Advance Team's greatest problem and challenge. Time compression effects the operation from the start of the advance to the arrival of the press corps and The President. Therefore, time management and clear, unambiguous lines of communication are essential. This manual contains proven and effective techniques; however, it is not exhaustive. As a result, common sense, efficient work habits and time management are your most proven resources.

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Subseries:
WHORM Cat.:
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AR Case #:	MR Case #:
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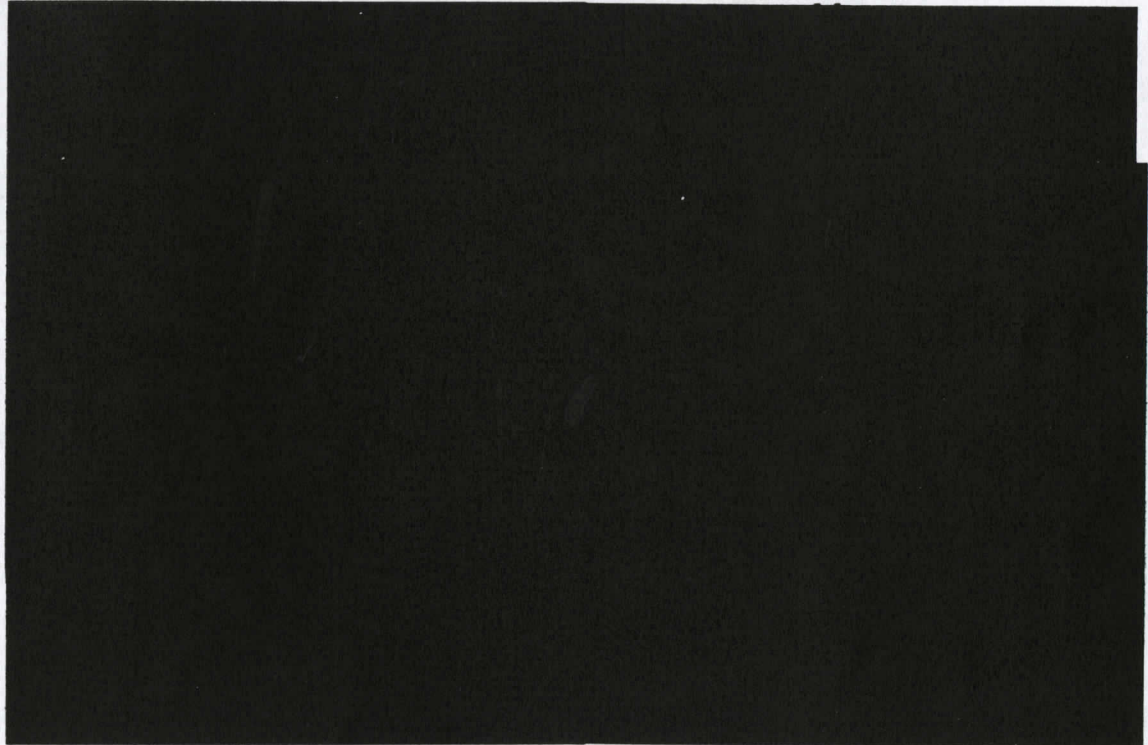
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C. Team Concept

The implementation of Presidential public events requires a high level of cooperation between potentially competing interests. The only proven method to alleviate this potential conflict has been the development of a TEAM CONCEPT which requires a thorough understanding and awareness of each of the members of the White House Advance Team's problems and requirements. However, the cohesiveness and effectiveness of the team is predicated on the leadership function performed by the Advance Office and the Advanceman.

Because he is completely responsible for the final outcome of an event, it is necessary that an Advanceman understands the general functions and capabilities of his team members and the agencies they represent.

1.



(b)(7)
(e)(f)

2. The Military Aide acts as the focal point for all military support provided to The President and the White House Staff. He is responsible for making the necessary arrangements so that The

President is always able to carry out his Constitutional duties as Commander-in-Chief of the U.S. Armed Forces. The Military Aide, as the representative of the Director of Special Support Services, directs the efforts of a military advance element consisting of one or more of the following: Air Force One, HMX-1, White House Communications Agency, White House Staff Mess (stewards), White House Medical Unit, White House Transportation Agency ("Carpet" and baggage handlers).

Any matter pertaining to the military, to include local military units as well as the above mentioned agencies, should be coordinated with the Military Aide assigned the event.

A Military Aide will take part in all surveys, pre-advances and advances. An Aide will be in place prior to the President's arrival at most out of town events. Of course, one of the Military Aides always accompanies The President anytime he leaves The White House, whether its to the Old Executive Office Building, to California or overseas.

3. The White House Communications Agency (WHCA) Trip Officer reports to the Military Aide and is responsible for providing Presidential and staff communications support. Depending upon the nature of the event, WHCA may also be responsible for audio-visual support, lighting and power.
4. The White House Press Advance Representative determines the physical and logistical requirements needed to insure adequate press coverage. It is the Advanceman's responsibility, working in conjunction with the Press Advanceman, to insure that these requirements are fulfilled and ready. The Advanceman consults him for recommendations on the staging of an event, particularly the manner in which the event will be covered by the press. The final outcome of any event is determined, to a great extent, by the manner in which the press interprets it. The Press Advanceman provides expertise to insure the proper conditions to cover the event. He coordinates all the movements of the White House

Press Corps during the Presidential trip. The Advanceman should always consult the Press Advanceman on any arrangements being made for the White House Press Corps or the President's public activities during the trip.

5. The President's Media Consultant provides the Advanceman with recommendations on the staging of an event in order to achieve maximum live television coverage. He will assist the Advanceman in determining the best way to cover an event.

D. Presidential Advancing

Advancing is an art! It is the exhaustive, detailed planning that makes each Presidential trip and event appear to be an effortless success. An incredible diversity of activities are involved: organizing the efforts of local citizens or sponsoring groups anxious to host the President; publicizing the President's impending visit; deciding where and how the President will go; working with the White House support team on a myriad of details from press coverage to motorcades; coordinating the audio/visual requirements with the White House Communications Agency; assisting and guiding local efforts to provide the proper atmosphere; providing suggestions and guidance on the use of "color" to add a tenor of dignity, gaiety and/or spontaneity to a visit; arranging for the right people to be in all the right places at the right time; meeting with governors, mayors and business and labor leaders and working with them in such a manner that they feel comfortable and at ease around the President, while following what the schedule requires; and above all, anticipating potential problems and having solutions available!

E. The Presidential Advanceman

He is always a manager - integrating and coordinating a number of dissimilar functions, all of which contribute to the achievement of a successful Presidential event. He is the leader of a highly professional and dedicated team of White House experts. He is the President's personal representative and, in many cases, is the first tangible contact the local people have ever had with

the White House. Thus, his authority and responsibilities are substantial and special care must be taken to ensure this trust is not violated. He is constantly being scrutinized, and so his department must be exceptional. He possesses a rare combination of characteristics and abilities: he is the decision-maker, graced with a tremendous amount of common sense and good judgment; he is diplomatic, yet forceful; he has the ability to anticipate and view matters in their overall context and not get consumed by unimportant details; he is resourceful and has a unique ability to organize people, things, and his own time; he has the answers; in short, he can get the job done in a manner becoming a personal representative of the President. Yet the Presidential Advanceman must accomplish these things in an anonymous fashion - giving gladly the credit for a successful visit to the local people or event sponsors.

F. The Influence and the Responsibility

Advancing the President is one of the most rewarding and most difficult jobs an individual can undertake. Designated to serve as the personal representative of the President of the United States, the Presidential Advanceman simultaneously assumes tremendous influence and responsibility. During the course of planning and conducting a Presidential appearance or visit, the Advanceman must delegate some of his authority to the team he directs, but the responsibility -- the full responsibility -- for the final outcome of the event is his alone.

During each advance, a Presidential Advanceman is frequently the first direct contact any American citizen has with the White House. Except through the distant, impersonal medium of television, millions have never seen the President, Air Force One, or even a representative of the President. To these people, the Advanceman represents an awesome amount of power and authority. The Advanceman must quickly recognize this new responsibility and use it judiciously and effectively, working with a guiding hand to produce a memorable Presidential visit which is efficient, timely and smooth; yet, it must be a visit that does not leave the impression in anyone's mind that members of the President's staff are "heavy handed". The Advanceman must learn to coaxe and prod, not push; to pull people along in his wake, not shove them.

The only textbook for this job is a thorough knowledge of techniques proven successful in the past. Yet, never forget that every Presidential appearance is unique in some respect. The ever-changing requirements make common sense an Advanceman's most important asset.

G. The Team

The Advanceman's White House contact is the Advance Office. Starting with the basics of the proposed site, date, and rationale for a Presidential appearance, it is the Advance Office which is the Advanceman's key source for all necessary information. The Advanceman submits, to the office, tentative schedules for final approval and questions relating to the event on all matters requiring Presidential-level mediation or decisions. An Advanceman should not feel that he is losing control if he has to ask the Advance Office for advice or assistance, for it is a wise and prudent person who can be honest to himself. He should keep the Advance Office up-to-date on the progress of the advance. On the other hand, the Advanceman should not bother the Advance Office with trivia that can and should be handled by himself. Call for necessities, not niceties!

Working with the Presidential Advanceman will be a team of elite professionals, each of whom is an acknowledged expert in his field. They are:

1. Secret Service Lead Advance Agent
2. White House Press Advance Representative
3. Military Aide
4. White House Communications Agency Trip Officer
5. The Presidential Watch (Stewards)
6. The President's Media Consultant (optional)

Also, the team usually includes Air Force One and HMX Advance Representatives, a White House Medical Unit Representative, a White House Transportation Office Representative and others, depending on the event.

As head of this team, the Advanceman coordinates all information provided him by these experts and uses it to make all major decisions or recommendations affecting the advance. Because of the great number of decisions an Advanceman must make all day, every day, even the most experienced Advanceman is going to make some wrong decisions. The only avenue to success is to acknowledge a mistake as soon as it becomes apparent, and correct it immediately. Personal pride, stubbornness, or fear of embarrassment can never be allowed to influence an Advanceman or hinder a Presidential advance.

Personal availability is a major responsibility of the Advanceman. The team is trained to come to the Advanceman with both facts and questions, and they expect and deserve immediate decisions and answers. An Advanceman who is unavailable for even a few hours is sure to find his entire operation seriously bogged down -- the team cannot and should not operate without the Advanceman's direction.

In order for team members to function at peak efficiency at all times, it is up to the Advanceman to hold daily meetings to keep everyone posted on the progress of the advance and on his regular telephone conversations with the Advance Office, so that they know immediately when plans concerning their activities are confirmed, changed, or cancelled.

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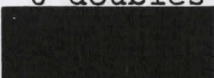
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H. The Trip Coordinator



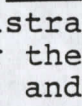

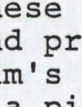
The Trip Coordinator assigned to a Presidential event or trip is the focal point for information, both to the Advanceman and to other White House offices involved with the event. (See TAB E for Trip and Event checklists).

Once assigned a trip, the Trip Coordinator is responsible for:

1. Hotel Arrangements. The standard block of rooms for the advance team must be reserved (usually prior to the pre-advance) as the advance team is usually left in place at the conclusion of the pre-advance. (See TAB E for hotel contact list.) The standard block is:

WHS Advance:	5 singles	
	2 Suites (for offices)	
WHCA:	9 singles	
	8 doubles	
USSS:		(b)(7) (e)(5)

If the trip involves a Presidential overnight, the additional rooms (total of 250) are preliminarily blocked for the overnight as follows:

Pre-Advance:		(see above)
Traveling Staff:		(b)(7)
Press:		(e)(5)
Military:		
USSS:		

The White House Administration Office (Room 1 OEOB) is where the bills for the White House are to be sent. WHCA (Military) and USSS are billed separately.

2. Press Credentials. These must be ordered from the Graphics Department and printed in Duplicating prior to the pre-advance team's departure. The credentials must have a picture of the White House on them and state the date and place of the trip. The standard order is:

150 National (one color) given to the Transportation Office
300 Local (second color) given to the Press Advanceman

3. The Pre-Advance. The Trip Coordinator is responsible for scheduling and making all travel arrangements regarding the pre-advance. This includes arranging for a military aircraft from the Military Office, informing White House support offices (ie: USSS, WHCA, Speechwriters, etc.), contacting the host committee(s) to arrange for the site survey(s) as well as for ground transportation, determining the trip manifest in coordination with John Nettles of the Military Office and preparing a pre-advance schedule with local contacts and phone numbers.

The Trip Coordinator is also responsible for compiling trip files for each member of the Advance office involved in the pre-advance. The file should contain all pertinent information on the trip, maps of the city/state, local contacts and a rough trip schedule (if possible). A Trip Profile should also be completed (See TAB E).

The pre-advance usually is scheduled one week from The President's trip and the advance teams are usually left in place. The Trip Coordinator accompanies the pre-advance and returns to Washington to coordinate the trip from there.

4. Deaver Memorandum. Is developed with Bill Henkel from information obtained on the pre-advance and includes the event(s) concepts, optional events, questions, recommended press coverage and a proposed summary schedule. The original and a copy are sent to William Sittmann and a copy is given to Michael McManus (see TAB C for example).
5. Trip Meeting. The Trip Coordinator schedules a trip meeting, secures a meeting room, contacts the appropriate White House offices, attends the meeting and ensures that briefing papers are assigned. The trip meeting usually is scheduled after the Deaver Memorandum and proposed schedule have been approved by Michael Deaver, copies of which are distributed at the meeting. (See Section One for list of attendees.)
6. White House Senior Staff Memorandum. A memorandum to selected senior staff and logistical support offices with the approved summary schedule from Michael Deaver is developed with Bill Henkel. This memorandum also points out any potential problems or questions in regard to the trip. Occasionally, a draft detailed schedule is distributed instead of the summary schedule. (See TAB C for example.)

7. Network Press Producers. The Trip Coordinator generally responds to inquiries from press producers regarding the trip prior to the arrival of the Press Advanceman on site. Specific, detailed information is generally not given but rather a rough outline of the schedule and any local contacts that may assist the producers in making their equipment installations and for their planning purposes only.

8. Detailed Schedule. Is developed with the Advanceman and Bill Henkel, paying close attention to guest/staff instructions, diagrams, manifests, motorcade assignments, and hotel lists to ensure that all traveling guests and staff are accounted for.

Detailed schedules generally must be printed and distributed by 3:00 p.m. the day prior to the trip or event. If the Trip Coordinator will be unable to meet the 3:00 p.m. deadline for the detailed schedule, The President's Personal Schedule must be distributed prior to 3:00 p.m.

Additionally, a traveling guest/staff memorandum must be distributed the day prior to the trip in the early morning. This memorandum should include all departure instructions, expected weather information, any special dress requirements and any other special instructions (see TAB C for example).

9. President's Personal Schedule. Is written by the Trip Coordinator for his personal use and is kept as brief as possible. His schedule always must include pertinent information such as guests aboard Air Force One and Marine One, Limo guests, greeters, etc. The original and a copy are delivered to Richard Darman. Marty Coyne receives an additional original for the First Lady (regardless of her participation) and David Fischer receives a copy. (See Attachment C for example).

10. Deaver Briefing. The Trip Coordinator schedules a briefing with Michael Deaver for a final review of the detailed schedule. This is usually scheduled with Donna Blume of Deaver's office for 8:30 a.m. the day prior to the trip and those to be invited are: Michael Deaver, Michael McManus, Edward Hickey, Larry Speakes, William Sittmann, David Fischer, Mark Weinberg, Military Aide and USSS.

A trip is never official until it has been announced by the White House Press Office. It is the responsibility of the Trip Coordinator to find out from them when the announcement will be made and advise Bill Henkel and the Staff and Press Advancemen. This is critical so that details of the trip are not leaked prior to an official announcement.

In addition to the above responsibilities, the Trip Coordinator is also responsible for coordinating and advancing in-house events where there is press coverage or any special logistical requirements. This includes events located in the Residence, West Wing, Rose Garden, South Grounds and OEOB. These events are generally categorized as follows (see TAB E for checklists):

1. State and Official Working Visits
2. Bill Signings/Proclamations
3. Ceremonies
4. Briefings
5. Special Events
6. Social Events

The Trip Coordinator is specifically responsible for coordinating with the assigned Project Officer(s), the Usher's Office, USSS, WHCA, Press Office, Scheduling Office, Speechwriters and David Fischer. Not only is the Trip Coordinator responsible for ensuring that the event is smoothly run but that The President's participation is appropriate. The Trip Coordinator additionally is responsible for producing and distributing a "Scenario" for the event (see TAB E for example).

I. The Schedule

The Advanceman plays an important part in preparing the schedule (see Appendix for examples). This document guides the President and his party from the time they leave Washington until they return. It has to be accurate down to the last minute and detail. It has to be so thorough that the President and his party could go through the event, in its entirety, if something happened suddenly to the Advanceman and he were unable to fill his usual role during the event. The schedule is the definitive document that allows the Presidential event to stand and proceed by itself. The schedule, itself, is determined through the joint efforts of all members of the advance team and each member of the advance team has to be thoroughly familiar with its content. Most of the information is confidential and the finalized version receives only limited distribution within the White House. It is never given to the press. The Press Advanceman, along with Mark Weinberg, prepares a separate Press Schedule that approximates the Detailed Guest and Staff Schedule but excludes a great deal of the detail and information that is not relevant to the press.

J. The Volunteers

In addition to this professional team, every advance also involves a second team; a group of local volunteers or event sponsors. Some of these groups are efficiently organized and are of great help to the Advanceman. Others may not be. The Advanceman should always encourage the participation of volunteers. He should create the atmosphere wherein the local organization receives the credit for doing all the work and putting together a successful Presidential visit.

Whenever he is assigned an event by the White House, the Advanceman will receive the name of the prime contact. If the event is a political rally, the prime contact might be the County Republican Chariman. In the case of a non-political event, such as a speech to an industrial group, the contact might be the president of the industrial organization sponsoring the function. Ideally, the Advanceman should arrange to channel all local volunteer efforts through this individual, so that he can direct all instructions to one individual and get all the local information he needs back from the same single individual. This is

easier than working directly with a multitude of people. However, if for some reason the prime contact does not have the time or inclination to handle such a heavy workload, the Advanceman must find some way to diplomatically explain the need for an individual to fill this role and obtain a substitute as a capable assistant.

Ideally, a prime contact is a person who has contacts in as many places as possible - he should be someone who can get things done quickly. He is a backup and right arm for the Advanceman.

K. Remember Details, Television Does

Every Presidential appearance is partially symbolic. Both live and television audiences will have different interpretations of what occurs at an event, affected by a multitude of diverse factors. Included in , but not limited to, these factors are such things as the size, nature, and temperament of the audience; their responsiveness to the President's remarks; the layout and configuration of the speech environment; the appearance of the facility, the quality of the decorations, etc. The Advanceman should make every reasonable effort to ensure these factors work to the advantage of the President; with a particular eye towards capturing the "picture" of the event, pre-conceived during the "storyboard" analysis. The importance of staging, site choice, program content, etc. becomes critical. People should be placed in areas where they have proximity to the Presidential platform and the press area (camera angles) both in front and in back (if approved by the USSS). The President can become more a part of an event if he can "feel" the audience.

L. First Rule of Advance: Never Assume Anything

An Advanceman must never assume anything!

Do the members of the audience know to rise when the President enters the room? The Advanceman covers such matters with the sponsor, hoping that he will designate several key people to do so, which enables the audience to key on someone with the assurance that they are doing the proper thing.

Does the audience know to clap when the speech is finished? The Advanceman also discusses this with the key contact, who may have several people on the dais, who stand and lead the applause at the conclusion of the Presidential remarks.

On the date of the scheduled appearance, will anything be happening in town that will affect the President's visit? The Advanceman finds out. He checks every available source and then keeps checking, informing the Advance Office immediately of such developments.

Just because the President is coming, the Advanceman never assumes people will appear. If the public is invited to view an event, the Advanceman insures that such knowledge receives widespread exposure.

The Advanceman plans all day, every day and he plans for all contingencies. He even plans what must be done in case of rain, snow or sleet, even though such weather may be considered a meteorological rarity.

M. Availability and Communications

Personal availability is a major responsibility of the Advanceman. The Advanceman is on call 24 hours a day. Keep WHCA constantly informed of your status and location. It is especially critical during the period before WHCA communications are established to keep in touch with the Advance Office in Washington. The Trip Coordinator must know how to reach you at all times.

SECTION ONE: Pre-Trip Operating Procedures

I. Notification received from Scheduling and Appointments of a proposed/approved Presidential Event.

Rspblty/Cmpltd

A. Start File

TD/Aman ()

B. Tentative assignment: Advance Staff

Henkel

C. Background information preparation.

1. The following contacted or information received/reviewed:

● Michael McManus

Henkel ()

● Fred Ryan/Sara Long

Henkel ()

2. Check Advance Office for files of previous trips:

TD ()

Henkel ()

- same city
- same organization
- same facility or hotel

3. William Henkel determines how and when the following are contacted for background data

- Special Support Services
- USSS
- Press Office
- Political Affairs
- Legislative Affairs
- Public Liaison
- Policy Development
- Communications
- Intergovernmental Affairs
- First Lady
- Administration and Management
- NSC (foreign trips or domestic foreign events)
- State A/EX (foreign trips only)

D. Logistical Background Info. Preparation

TD ()

1. Special Support Services

TD ()

- flight times
- meal service
- unique requirements
- communications
- transportation

2. Transportation Office

TD ()

E. Ascertain from USSS any unique problems Henkel ()

II. Survey

A. Determine if Survey required Henkel ()

B. Assign Survey Henkel ()

C. Who is to accompany on survey (USSS, special interest, etc.) Henkel ()

D. Determine if local contact should be made Henkel ()

E. Survey Report (See Tab A) Henkel/Aman/TD ()

F. Distribute Survey Report Henkel ()

1. Michael McManus
2. William Henkel
3. Fred Ryan/Sara Long
4. Selected Others (see Director)

III. Determine if Trip is political/official Henkel ()

A. Execute executive memorandum of understanding prepared by Fred Fielding's office if necessary. Henkel ()

B. Allocate expenses per understanding Elmore ()

IV. National Press Producers inquiries (Planning Purposes only trip detail information given) TD ()

V. Press Credentials from Graphic Services TD ()

A. 300 (one color) for Advance Team (local press)

B. 150 (second color, same layout) for Transportation Office (national press)

VI. Advance Trip Supplies

Terry/Ballentine ()

- A. Goodies - Advance personnel to order and procure through T. Elmore
- B. Motorcade signs
- C. Office supplies box
- D. Thank-you and gift forms
- E. Typewriters and Copy Machine

VII. Pre-Advance

- A. Complete Logistical Requirements for Pre-Advance TD ()
 - 1. Aircraft requested from Military Office
 - 2. Hotels
 - 3. Reservations
 - 4. Transportation
- B. Make appropriate local contacts (clear with McManus and Ryan) Henkel ()
- C. Prepare and Distribute Pre-Advance Schedule to Pre-Advance Personnel. TD ()
- D. Prepare file of information for pre-advance participants. TD ()
- E. Conduct Pre-Advance (See Tab B) Henkel/Aman/TD ()

VIII. Schedule Memorandum for Michael Deaver

Henkel/TD ()

- A. Prepared for or by Henkel to Michael Deaver via Michael McManus (See Tab C for example)
- B. Approved memorandum to:
 - 1. William Henkel
 - 2. Lead Advanceman
 - 3. Trip File
 - 4. Trip Meeting Participants
 - 5. Others depending on circumstance

TD ()

IX. Trip Meeting

NOTE: When possible review more than one trip/block of events

- A. Schedule Trip Meeting following pre-advance and invite attendees Henkel/TD ()
- B. Prepare copies of approved "Deaver Memorandum" and proposed summary schedule. Henkel ()
- C. Convene Trip Meeting/Schedule Review Meeting (See Tab E for list of attendees) Henkel ()

X. Official Public Announcement of the President's Participation by the White House Press Office

- A. Confirm when announcement desired from: Henkel ()
 - 1. Larry Speakes/Mark Weinberg
 - 2. Others (as required)
- B. Check Press Office on proposed date/time of announcement TD ()
- C. Inform shortly before official announcement by Press Office TD ()
 - 1. Advance Team
 - 2. Local hosts/event sponsor
 - As Needed (see Henkel):
 - 3. Congressional Affairs
 - 4. Political Affairs
 - 5. Intergovernmental Affairs
 - 6. First Lady's staff
 - 7. USSS
 - 8. Others depending on circumstance

XI. Inform Graphic Services and Duplicating of workload/timing

TD ()

XII. Senior Staff Memorandum Distributed

Henkel/TD ()

- A. Draft detailed schedule (or summary schedule prepared from "Deaver Memorandum") which is prepared for selected Senior Staff and logistical support offices (see Tab C for example)

XIII. Trip Briefing and final review of the schedule with Michael Deaver

- A. Usually scheduled 8:30 a.m. the day prior to the trip.

TD ()

- B. Attendees notified:

TD ()

1. Michael Deaver (Donna Blume)
2. Michael McManus
3. Edward Hickey
4. Larry Speakes
5. William Sittmann
6. David Fischer
7. Mark Weinberg
8. Military Aide
9. USSS

- C. Copies of final draft schedule for attendees to Henkel

TD ()

XIV. Traveling Guest and Staff Memorandum produced and distributed (see Tab C for example)

TD ()

XV. Detailed (staff) Schedule Finalized and Printed by 3:00 p.m. the day prior to the trip

TD ()

- A. Final copy DACOMed to Advancemen

TD ()

- B. Printed copies distributed to:

1. Traveling guests and staff
2. White House Staff
3. White House Logistical Support Offices

XVI. President's Personal Schedule written from detailed with advanceman's assistance

TD ()

- A. Distributed to:

1. Richard Darman - Original plus a copy
2. David Fischer - copy
3. Marty Coyne - original (for First Lady)

Withdrawal/Redaction Sheet (George Bush Library)

Document No. and Type	Subject/Title of Document	Date	Restriction	Class.
01c. manual	The Advance (2 pp.)	n.d.	(b)(2)	

Collection:

Record Group: Bush Presidential Records
Office: Advance, Office of
Series: Hazelrigg, Margaret J. (Peggy)
Subseries:
WHORM Cat.:
File Location: Binder: Advance Office Operations Manual

Date Closed: 8/8/2007	OA/ID Number: 06987-007
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RESTRICTION CODES

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- P-6 Release would constitute a clearly unwarranted invasion of personal privacy [(a)(6) of the PRA]

C. Closed in accordance with restrictions contained in donor's deed of gift.

PRM. Removed as a personal record misfile.

Freedom of Information Act - [5 U.S.C. 552(b)]

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- (b)(9) Release would disclose geological or geophysical information

SECTION TWO: The Advance

I. Administration

A. The Local Advance Office. Focal point for communication between event sponsors, the Advance Team, the White House Advance Office, and the White House Senior Staff.

TD/Aman ()

1. Physical Set-up

Aman ()

KEY: Clean and orderly environment

- hotel furniture removed
- adjoining, connecting rooms
- conference tables around perimeter
- office supply package from Washington

2. Staff Office volunteers

Aman ()

KEY: Commitment, task-oriented, efficient, technical skills

- Lead Advanceman must brief on players, information flow, support equipment, messages, other responsibilities (see policy memo Attach. B)

3. Standard Filing System

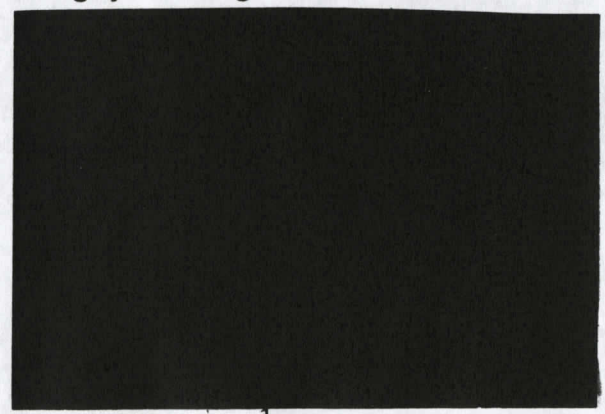
Aman ()

- file folder with a copy of each significant piece of paperwork in each folder. All papers must be date/timed stamped.
- folder distribution:
 - each advanceman
 - USSS lead agent
 - Press advanceman
 - Military aide
 - WHCA trip officer
 - AF1
 - HMX
 - TV Consultant
 - Transportation Office (if overnight)
 - Master trip file

4. General filing system organized as follows:

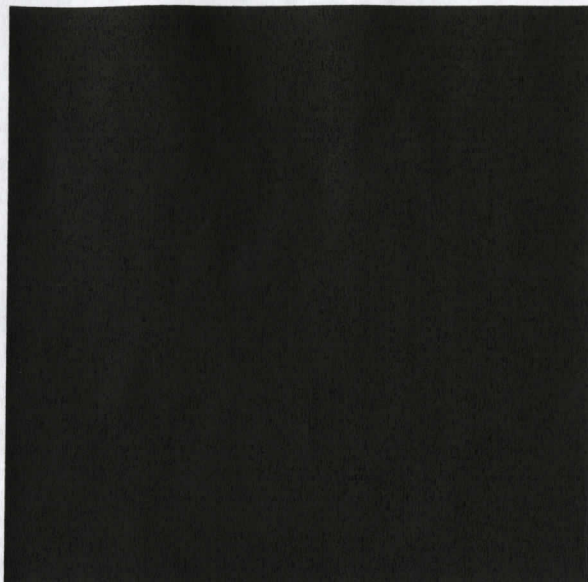
Aman ()

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(b)(2)

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(b)(2)

5. Information submitted to the Advance Office Aman ()
- detailed staff/guest schedule _____ ()
 - diagrams _____ ()
 - platform and guest list _____ ()
 - motorcades _____ ()
 - hotel room assignments _____ ()
 - important press clippings _____ ()
 - important background information (local color report, other events, people President to meet, local interest stories) _____ ()
 - any schedule change proposals with advantages, disadvantages and your recommendation _____ ()
6. Daily Advance Team Staff Meetings Aman ()
- Attendees:
- each advancement
 - lead USSS agent-site agents (optional, decision of lead agent)
 - Military Aide - AF1, HMX, stewards
 - WHCA trip officer - site officers (optional)
 - Press advancement
 - transportation office (if overnight)
 - others (lead advancement decides)

7. Daily meeting with key local contacts Aman ()

NOTE: Ideally scheduled immediately following advance team staff meeting

Attendees: Lead advancement determines

NOTE: For both meetings, if staff office secretary good, include to take notes

8. Daily advancement meeting evening meeting to review day's activities Aman ()

9. Daily report to Henkel Aman ()

10. Final call preferably before countdown meeting to: Aman ()

- David Fischer

11. Countdown meeting Aman ()

- early evening (before 8 p.m.) night before event
- final staff/guest schedule with diagrams should be used as agenda
- focus on the coordination aspect of each event
- attendees:
each advancement
lead USSS agent
site USSS agents
press advancement
Transportation advance (if overnight)
WHCA trip officer and site officers
Military Aide - AF1, HMX, stewards
TV consultant

12. Final advancement meeting Aman ()

- discuss each advancement's specific responsibility and location for each stage of the event

13. Conference call to AF1 (if necessary) Aman ()

- lead advancement
- Michael McManus
- David Fischer

B. Advancement's Checklist (See Tab D) Aman ()

SECTION THREE: Post Trip

I. From Advanceman

- A. Local Media Report (See Attach. H) PRESS Aman ()
 - 1. Completed by Press Advanceman, local press contact, or field advance office secretary
- B. Thank you letter form completed Aman ()
- C. Expense Reports Aman ()
- D. Financial Report Aman ()
 - 1. major expenses, any problems, who pays
- E. Trainee Evaluation Report (See Tab E) Aman ()
- F. Trip Report (See Tab G) Aman ()

II. Advance Office Project

- A. Expenses and Finance Report to Administrative Officer, Room 1 TD ()
- B. Thank You Letter forms forwarded TD ()
- C. Photographs forwarded Aman/TD ()
- D. Presidential Gifts logged and forwarded Aman/TD ()
- E. Thank you letters to Advancemen and Trainees TD ()
- F. Update individual Advanceman File /Card TD ()
- G. Edit Trip File TD ()

III. File Completed

- A. Thank you copies received TD ()
- B. Expenses processed and closed out D/Aman/TD ()
- C. Close-out with John Rogers Dir/TD ()
- D. New Summary stories filed TD ()
- E. Clippings filed TD ()
- F. All reports completed TD ()

**SURVEY REPORT CHECKLIST/FORMAT
(Narrative Memorandum with Tabs)**

Brief profile of area:

Demographic

Economic

Political

Local concerns

Local pride

Geographic and physical overview including: (can area support logistics of a Presidential event)

Airports

Routes

Sites

Times

Hotel(s)

Special interest items - possible optional events

Event analysis

Visualize event at the proposed site

Check feasibility considering:

staging

platform background

movements

President

staff

press

crowd

lighting

sound

press/visual impacts (back drop)

impact of Press on event attendees

storyboard (HPS)

meeting rational for event
parking
public assess

Optional Events and sites (same analysis)

Recommendation(s) with advantages and disadvantages clearly stated

Will event accomplish purpose(s) for the President's participation?

Tabs:

Rough schedule

Rough diagrams

Supporting material: maps, floor plans, etc.

PRE-ADVANCE CHECKLIST/REQUIREMENTS
(See Advanceman's Checklist Tab D)

- I. Arrival
 - A. Options
 - B. Staging
 - C. Diagrams
- II. Movements
 - A. Mode - options
 - B. Arrival/departure points
 - C. Physical requirements
 - D. Options
 - E. Diagrams
- III. Event Site(s)
 - A. Confirm location
 - B. Presidential movements
 - C. Physical requirements/space requirements
 - 1. overall event
 - a. staging (crowd control)
 - b. platform/press platform
 - c. sound
 - d. lighting
 - e. backdrop
 - f. podium
 - g. teleprompter
 - 2. press
 - 3. staff/guest
 - D. Decide Storyboard (HPS)
 - E. Program
 - F. Attendees

- G. Entrance/Exit moves
 - 1. President
 - 2. press
 - 3. staff/guest
 - 4. attendees (magnetometers)
- H. Holding room(s)
 - 1. physical requirements
- I. Office space
 - 1. physical requirements
- IV. Audience/Participants
 - A. Composition
 - B. Available area/attendee capacity/estimate of crowd required
 - C. Effect press will have on audience/staging
 - D. Audience access
 - 1. tickets
 - 2. Credential
 - 3. Invitation
 - 4. Magnetometers
 - E. Crowd Raising required at event, by
 - 1. Host
 - 2. Other
- V. Other crowd situation (where and how)
- VI. Hotels
 - A. Availability/Flexibility
 - B. Attitude
 - C. Facilities
 - D. Floor plans
 - E. Entrance/Exit moves
 - F. Special requirements

- G. Services (stewards)
- H. Diagrams
- VII. Finances
 - A. Determine cost
 - B. Who pays
 - C. Finance report to be submitted to John Rogers
- VIII. Develop Tentative Schedule
 - A. Options
 - B. Correct times
 - C. Include all available information
- IX. Problems
 - A. Surface Team Problems
 - 1. Security
 - 2. Special Support
 - 3. Press/Media Coverage
 - B. Host/Event Problems
 - C. Develop issues involved
 - D. Recommended solutions/options
- X. Theme/Rational
 - A. Event meet purposes for trip
 - B. Political

Withdrawal/Redaction Sheet

(George Bush Library)

Document No. and Type	Subject/Title of Document	Date	Restriction	Class.
01d. memo	memo for Pre-Advance Participants Personal Information Redacted (1 pp.)	6/21/83	(b)(6)	

Collection:

Record Group: Bush Presidential Records
Office: Advance, Office of
Series: Hazelrigg, Margaret J. (Peggy)
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THE WHITE HOUSE

WASHINGTON

June 21, 1983

MEMORANDUM FOR PRE-ADVANCE PARTICIPANTS

FROM WILLIAM HENKE

SUBJECT PRE-ADVANCE ITINERARY FOR SHAWNEE MISSION
KANSAS AND LOUISVILLE, KENTUCKY - JUNE 22,
1983

6:15 a.m. Vans depart West Basement enroute Andrews Air Force Base.

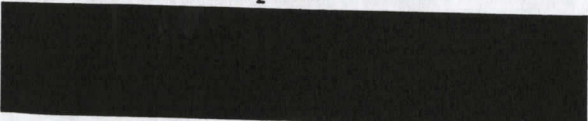
7:00 a.m. C-9 departs Andrews Air Force Base enroute Kansas City Missouri.
EDT

Flight Time: 2 hrs. 30 mins.
Time Change: - 1 hr.
Food Service: Breakfast

8:30 a.m. C-9 arrives Kansas City Downtown Airport,
CDT Executive Beechcraft Ramp, Kansas City, Missouri.

Met by:

Mr. Lew Armistead
Director of Public Affairs
National Association of Secondary
School Principals



(b)(6)

8:35 a.m. Pre-advance team departs enroute Shawnee Mission High School.

Drive Time: 25 mins.

9:00 a.m. SITE SURVEY ADDRESS NATIONAL ASSOCIATION OF SECONDARY SCHOOL PRINCIPALS & NATIONAL ASSOCIATION OF STUDENT COUNCILS

Shawnee Mission Northwest High School
12701 West 67th Street
Shawnee Mission, Kansas 66216

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10:30 a.m. Pre-advance team departs enroute Kansas City Downtown Airport, Executive Beechcraft Ramp, Kansas City, Missouri.

Drive Time: 25 mins.

10:55 a.m. Pre-advance team arrives Kansas City Downtown Airport.

11:00 a.m. C-9 departs Kansas City, Missouri enroute
CDT Louisville, Kentucky.

Flight Time: 1 hr. 20 mins.

Time Change: + 1 hr.

Food Service: Lunch

1:20 p.m. C-9 arrives Standiford Field, Butler Aviation
EDT Ramp, Louisville, Kentucky.

Met by:

Mr. Bill Prince
Director, Training & Government
Relations
National Vocational Industrial
Clubs of America



1:25 p.m. Pre-advance team departs enroute Kentucky Fair & Exposition Center.

Drive Time: 10 mins.

1:35 p.m. SITE SURVEY: ADDRESS 19TH ANNUAL NATIONAL VOCATIONAL INDUSTRIAL CLUBS OF AMERICA LEADERSHIP CONFERENCE AND SKILLS OLYMPICS

Kentucky Fair & Exposition Center
Freedom Hall

3:05 p.m. Pre-advance team departs enroute Standiford Field, Butler Aviation Ramp.

Drive Time: 10 mins.

3:15 p.m. Pre-advance team arrives Standiford Field, Butler Aviation Ramp.

3:20 p.m. C-9 departs Louisville, Kentucky enroute Andrews
EDT Air Force Base.

Flight Time: 1 hr. 15 mins.
Time Change: None
Food Service: Snacks

4:35 p.m. C-9 arrives Andrews Air Force Base.
EDT

4:40 p.m. Vans depart Andrews Air Force Base enroute The White House.

5:15 p.m.* Vans arrive West Basement.

THE WHITE HOUSE

WASHINGTON

June 22, 1983

MEMORANDUM FOR MICHAEL K. DEEVER
THROUGH MICHAEL A. McMANUS, JR.
FROM WILLIAM HENKEL
SUBJECT TRIP OF THE PRESIDENT TO LOUISVILLE, KENTUCKY
AND SHAWNEE, KANSAS - JUNE 29, 1983

Attached is a proposed summary schedule based on the pre-advance conducted June 22, 1983.

EVENT CONCEPTS

Louisville, Kentucky

The President will participate in four events at the Kentucky Fair and Exposition Center in Louisville, Kentucky on June 29, 1983. At the first event, The President will view two or three United States Skill Olympics demonstrations. The actual Olympic competition does not begin until June 30. However, several of the competition areas (i.e. Auto Mechanics competition, Diesel Equipment competition) will be in place for The President to witness "practice runs" on June 29.

The President will then proceed to Freedom Hall Coliseum to address approximately 6,000 attendees of the 19th Annual National Vocational Industrial Clubs of America Leadership Conference and Skill Olympics. The competition is divided into two groups, high school and community college level. Therefore, the audience will be comprised of high school students as well as adults.

The National Vocational Industrial Clubs of America goal is to illustrate how industry and education work together to provide industry with well trained and motivated manpower. This convention is an excellent illustration of The President's push for private sector involvement and volunteerism as 245 major corporations work together to create the actual Olympic competition sites at a personal shared cost of over \$7 million.

Following his remarks, The President will meet with the leadership of 12 vocational student organizations (i.e. Future Farmers of America, Future Homemakers of America). At the conclusion of this meeting, The President will meet with Kentucky GOP leaders for a photo opportunity and then depart for Kansas.

Shawnee, Kansas

The President will address approximately 1300 students and 400 student activity advisors (not Secondary School Principals as stated by Scheduling) at the 47th Annual National Association of Student Councils' Convention at Shawnee Mission High School in Shawnee, Kansas. Sponsored by the National Association of Secondary School Principals, NASC represents 10,000 secondary school student organizations and more than 20 million student leaders and is the only national secondary student government group in the United States. This represents an excellent forum for The President to discuss the National Commission on Excellence in Education Report with student leaders and how they can help mobilize change. This event also presents an excellent opportunity for The President to communicate with these student leaders by conducting a question and answer session at the conclusion of his remarks. This would allow The President's remarks to be shorter. Stand up microphones will be placed in the audience for the question and answer session.

Following his remarks, The President will meet with the leadership of the National Association of Student Councils and the National Association of Student Activity Advisors for approximately 15 minutes, giving the press time to file at the site.

The President will then motorcade back to Kansas City (Missouri) Downtown Airport and proceed to a Missouri GOP photo opportunity prior to departure for Los Angeles.

This day's activities provide an interesting contrast from recent education events. The President can articulate his education theme to high school student audiences rather than education leaders and legislators.

QUESTION

I suggest The President's participation in a question and answer session with the student representatives in Kansas following his remarks.

APPROVE

DISAPPROVE

SUGGESTED PRESS COVERAGE

EVENT #1: U.S. SKILL OLYMPIC COMPETITION
Expanded Pool Coverage

APPROVE

DISAPPROVE

Shd be well controlled.

EVENT #2: ADDRESS NATIONAL VOCATIONAL INDUSTRIAL CLUBS OF AMERICA
Open Press Coverage

APPROVE DISAPPROVE

EVENT #3: VOCATIONAL LEADERSHIP MEETING
Official Photographer Only

APPROVE DISAPPROVE

EVENT #4: KENTUCKY GOP PHOTO OPPORTUNITY
Official Photographer Only

APPROVE DISAPPROVE

EVENT #5: ADDRESS NATIONAL ASSOCIATION OF STUDENT COUNCILS
Open Press Coverage

APPROVE DISAPPROVE

EVENT #6: STUDENT COUNCIL & ADVISOR LEADERSHIP MEETING
Official Photographer Only

APPROVE DISAPPROVE

EVENT #7: MISSOURI GOP PHOTO OPPORTUNITY
Official Photographer Only

APPROVE DISAPPROVE

PROPOSED SUMMARY SCHEDULE FOR`

LOUISVILLE, KENTUCKY

AND

SHAWNEE, KANSAS

JUNE 29, 1983

- 8:45 a.m. Marine One departs The White House enroute Andrews Air Force Base.
- 9:00 a.m. Marine One arrives Andrews Air Force Base.
- 9:05 a.m. Air Force One departs Andrews Air Force Base enroute Louisville, Kentucky.
- 10:25 a.m. Air Force One arrives Standiford Field, Louisville, Kentucky.
- 10:30 a.m. Motorcade departs Standiford Field enroute Kentucky Fair and Exposition Center.
- 10:40 a.m. Motorcade arrives Kentucky Fair and Exposition Center.

NOTE: It will be necessary to hold THE PRESIDENT briefly in the limo in order to move the press pool to the competition area.

- 10:45 a.m. THE PRESIDENT proceeds to U. S. Skill Olympics demonstration area.

EXPANDED POOL COVERAGE

- 11:00 a.m. THE PRESIDENT concludes and proceeds to holding room.
- 11:05 a.m. THE PRESIDENT arrives holding room.
- 11:10 a.m. THE PRESIDENT proceeds to dais.
- 11:15 a.m. THE PRESIDENT arrives dais.
- 11:20 a.m. THE PRESIDENT proceeds to podium for remarks to the 19th Annual National Vocational Industrial Clubs of America Leadership Conference and Skill Olympics.

OPEN PRESS COVERAGE

- 11:30 a.m. THE PRESIDENT concludes remarks and proceeds to holding room.
- 11:35 a.m. THE PRESIDENT arrives holding room.
- 11:40 a.m. THE PRESIDENT proceeds to meeting with leaders of vocational student organizations.

OFFICIAL PHOTOGRAPHER ONLY

- 11:50 a.m. THE PRESIDENT concludes meeting and holds briefly.
- 11:55 a.m. THE PRESIDENT meets with members of the Kentucky GOP for photo opportunity.

OFFICIAL PHOTOGRAPHER ONLY

- 12:05 p.m. THE PRESIDENT concludes meeting and proceeds to motorcade for boarding.
- 12:10 p.m. Motorcade departs Kentucky Fair and Exposition Center enroute Standiford Field.
- 12:20 p.m. Motorcade arrives Standiford Field.
- 12:25 p.m. Air Force One departs Louisville, Kentucky
EDT enroute Kansas City, Missouri.
- 1:05 p.m. Air Force One arrives Kansas City Downtown
CDT Airport.
- 1:10 p.m. Motorcade departs Kansas City, Missouri enroute Shawnee Mission Northwest High School, Shawnee, Kansas.
- 1:30 p.m. Motorcade arrives Shawnee Mission High School.
THE PRESIDENT proceeds to holding room.
PRIVATE TIME: 10 mins.

- 1:40 p.m. THE PRESIDENT proceeds to dais.
- 1:45 p.m. THE PRESIDENT proceeds to podium for remarks.

OPEN PRESS COVERAGE

- 1:50 p.m. THE PRESIDENT concludes remarks and begins question and answer session.
- 1:55 p.m. THE PRESIDENT concludes question and answer session and proceeds to holding room.

- 2:00 p.m. THE PRESIDENT arrives holding room.
2:04 p.m. THE PRESIDENT proceeds to Room 11.
2:05 p.m. THE PRESIDENT arrives Room 11 for student council and student activity advisor leadership meeting.

OFFICIAL PHOTOGRAPHER ONLY

- 2:20 p.m. THE PRESIDENT concludes meeting and proceeds to motorcade for boarding.
2:25 p.m. Motorcade departs Shawnee, Kansas enroute Kansas City (Missouri) Downtown Airport.
2:45 p.m. Motorcade arrives Kansas City Downtown Airport.
THE PRESIDENT proceeds to _____ for Missouri GOP photo opportunity.
2:50 p.m. THE PRESIDENT arrives _____ for Missouri GOP photo opportunity.

OFFICIAL PHOTOGRAPHER ONLY

- 3:00 p.m. THE PRESIDENT concludes photo opportunity and proceeds to Air Force One for boarding.
3:05 p.m. Air Force One departs Kansas City, Missouri
CDT enroute Los Angeles, California.
4:35 p.m. Air Force One arrives Los Angeles International
PDT Airport.
4:40 p.m. Marine One departs LAX enroute Santa Monica landing zone.
4:50 p.m. Marine One arrives Santa Monica landing zone.
4:55 p.m. Motorcade departs landing zone enroute Beverly Wilshire Hotel.
5:05 p.m. Motorcade arrives Beverly Wilshire Hotel.
5:10 p.m. THE PRESIDENT arrives Suite.

NOTE: This schedule reflects 5 minute increments for Presidential movements to accomodate press filing time where necessary.

THE WHITE HOUSE

WASHINGTON

November 16, 1983

MEMORANDUM FOR KENNETH M. DUBERSTEIN DAVID C. FISCHER
DAVID R. GERGEN FRED J. RYAN
EDWARD V. HICKEY, JR. MARGARET TUTWILER
MICHAEL A. MCMANUS, JR. MARK WEINBERG
LARRY M. SPEAKES THERESA ELMORE
LEE VERSTANDIG BILLIE SHADDIX
JACK C. COURTEMANCHE TRANSPORTATION
BEN ELLIOTT USSS OPERATIONS

FROM: WILLIAM HENKEL

SUBJECT: TRIP OF THE PRESIDENT TO _____

Attached is a tentative summary schedule for your planning purposes.

[NOTE: Summary schedule is the same as the proposed summary schedule attached to the Deaver Memorandum unless there are changes from Michael Deaver.]

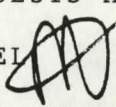
THE WHITE HOUSE

WASHINGTON

June 28, 1983

MEMORANDUM FOR TRAVELLING GUESTS AND STAFF

FROM

WILLIAM HENKEL 

SUBJECT

TRIP OF THE PRESIDENT TO KENTUCKY, KANSAS AND CALIFORNIA: JUNE 29 - JULY 4, 1983

The following information is to be used for your planning purposes. Detailed schedules will be distributed on Air Force One upon departure Wednesday, June 29, 1983.

DRESS: Men's Business Suit.

EXTENDED FORECAST:

Louisville, Kentucky:	Chance of thunderstorms; Mid 80's.
Shawnee, Kansas:	Chance of thunderstorms; Low 80's.
Los Angeles, California:	Mostly sunny; Low's-mid 60's; Highs-mid 70's.
Santa Barbard, California:	Mostly sunny; Lows-upper 50's; Highs-mid 70's.

WEDNESDAY, JUNE 29, 1983

7:00 a.m.	BAGGAGE CALL in West Basement. Leave bags unlocked and hand carry all film.
8:00 a.m.	Vans for staff not manifested on Marine One and requiring transportation to Andrews Air Force Base depart West Basement. Board Air Force One immediately upon arrival.
8:30 a.m.	Guests and staff with own transportation should be at Andrews Air Force Base, Base Operations Building.
8:35 a.m.	Staff manifested on Marine One proceed to South Lawn and board immediately.
8:40 a.m.	THE PRESIDENT proceeds to Marine One for boarding.

Withdrawal/Redaction Sheet (George Bush Library)

Document No. and Type	Subject/Title of Document	Date	Restriction	Class.
01f. schedule	Page 2 (1 pp.)	n.d.	(b)(2)	

Collection:

Record Group: Bush Presidential Records
Office: Advance, Office of
Series: Hazelrigg, Margaret J. (Peggy)
Subseries:
WHORM Cat.:
File Location: Binder: Advance Office Operations Manual

Date Closed: 8/8/2007	OA/ID Number: 06987-007
FOIA/SYS Case #: 2007-0753-F	Appeal Case #:
Re-review Case #:	Appeal Disposition:
P-2/P-5 Review Case #:	Disposition Date:
AR Case #:	MR Case #:
AR Disposition:	MR Disposition:
AR Disposition Date:	MR Disposition Date:

RESTRICTION CODES

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

- P-1 National Security Classified Information [(a)(1) 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.

Freedom of Information Act - [5 U.S.C. 552(b)]

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- (b)(9) Release would disclose geological or geophysical information

8:45 a.m. Marine One departs The White House.

9:05 a.m. Air Force One departs Andrews Air Force Base
EDT enroute Louisville, Kentucky. (b)(2)

10:25 a.m. Air Force One [REDACTED]
EDT [REDACTED] Louisville, Kentucky.

10:30 a.m. Motorcade departs enroute Kentucky Fair and
Exposition Center.

10:40 a.m. Motorcade arrives Kentucky Fair and Exposition
Center.

12:10 p.m. Motorcade departs enroute Standiford Field.

12:20 p.m. Motorcade arrives Standiford Field.

12:25 p.m. Air Force One departs Louisville, Kentucky
EDT enroute Kansas City, Missouri.

1:05 p.m. Air Force One arrives Kansas City
CDT [REDACTED]

1:10 p.m. Motorcade departs enroute Shawnee Mission
Northwest High School, Shawnee, Kansas. (b)(2)

1:30 p.m. Motorcade arrives Shawnee Mission Northwest High
School.

2:30 p.m. Motorcade departs enroute Kansas City Downtown
Airport.

2:50 p.m. Motorcade arrives Kansas City [REDACTED]

2:55 p.m. Air Force One departs Kansas City, Missouri
CDT enroute Los Angeles, California. (b)(2)

4:25 p.m. Air Force One arrives Los Angeles [REDACTED]
PDT [REDACTED] (b)(2)

4:30 p.m. Marine One departs enroute Santa Monica landing
zone.

4:40 p.m. Marine One arrives Santa Monica landing zone.

4:45 p.m. Motorcade departs enroute The Beverly Wilshire.

4:57 p.m. Motorcade arrives The Beverly Wilshire.

REMAIN OVERNIGHT: THE BEVERLY WILSHIRE

THURSDAY, JUNE 30, 1983

8:40 a.m. Proceed to motorcade and board.

4:30 p.m. BAGGAGE CALL. Place unlocked bags outside doors and hand carry all film.

8:53 a.m. Motorcade departs enroute Santa Monica landing zone.

9:05 a.m. Motorcade arrives Santa Monica landing zone.

9:10 a.m. Marine One departs enroute Pioneer High School landing zone, Whittier, California.

9:25 a.m. Marine One arrives Pioneer High School landing zone.

Motorcade departs enroute Pioneer High School.

9:30 a.m. Motorcade arrives Pioneer High School.

10:30 a.m. Motorcade departs enroute Pioneer High School landing zone.

10:35 a.m. Motorcade arrives Pioneer High School landing zone.

10:40 a.m. Marine One departs enroute Santa Monica landing zone.

10:55 a.m. Marine One arrives Santa Monica landing zone.

11:00 a.m. Motorcade departs enroute The Beverly Wilshire.

11:12 a.m. Motorcade arrives The Beverly Wilshire.

5:30 p.m. Proceed to motorcade for boarding.

5:38 p.m. Motorcade departs enroute Santa Monica landing zone.

5:50 p.m. Motorcade arrives Santa Monica landing zone.

5:55 p.m. Marine One departs enroute Queen Mary landing zone, Long Beach, California.

6:10 p.m. Marine One arrives Queen Mary landing zone.

6:15 p.m. Motorcade departs enroute Spruce Goose Dome.

Withdrawal/Redaction Sheet (George Bush Library)

Document No. and Type	Subject/Title of Document	Date	Restriction	Class.
01g. schedule	Page 4 (1 pp.)	n.d.	(b)(7), (e)(f)	

Collection:

Record Group: Bush Presidential Records
Office: Advance, Office of
Series: Hazelrigg, Margaret J. (Peggy)
Subseries:
WHORM Cat.:
File Location: Binder: Advance Office Operations Manual

Date Closed: 8/8/2007	OA/ID Number: 06987-007
FOIA/SYS Case #: 2007-0753-F	Appeal Case #:
Re-review Case #:	Appeal Disposition:
P-2/P-5 Review Case #:	Disposition Date:
AR Case #:	MR Case #:
AR Disposition:	MR Disposition:
AR Disposition Date:	MR Disposition Date:

RESTRICTION CODES

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6:17 p.m. Motorcade arrives Spruce Goose Dome.
7:55 p.m. Motorcade departs enroute Queen Mary landing zone.
8:00 p.m. Motorcade arrives Queen Mary landing zone.
8:05 p.m. Marine One departs enroute Rancho del Cielo.

(b)(7)
(e)(5)



9:10 p.m. Marine One arrives Rancho del Cielo.

REMAIN OVERNIGHT: RANCHO DEL CIELO
STAFF OVERNIGHT: SANTA BARBARA BILTMORE
SANTA BARBARA SHERATON

FRIDAY, JULY 1, 1983

PRIVATE TIME

SATURDAY, JULY 2, 1983

9:06 a.m. Radio Address
PDT

PRIVATE TIME REMAINDER OF DAY.

SUNDAY, JULY 3, 1983

PRIVATE TIME

MONDAY, JULY 4, 1983

PRIVATE TIME

NOTE: DETAILED SCHEDULE FOR TUESDAY, JULY 5, 1983 WILL
BE DISTRIBUTED IN SANTA BARBARA.

Withdrawal/Redaction Sheet (George Bush Library)

Document No. and Type	Subject/Title of Document	Date	Restriction	Class.
01h. chart	Seating Chart of VH-3D (1 pp.)	6/29/83	(b)(7), (e)(f)	

Collection:

Record Group: Bush Presidential Records
Office: Advance, Office of
Series: Hazelrigg, Margaret J. (Peggy)
Subseries:
WHORM Cat.:
File Location: Binder: Advance Office Operations Manual

Date Closed: 8/8/2007	OA/ID Number: 06987-007
FOIA/SYS Case #: 2007-0753-F	Appeal Case #:
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Withdrawal/Redaction Sheet (George Bush Library)

Document No. and Type	Subject/Title of Document	Date	Restriction	Class.
01i. chart	Seating Chart of Air Force (1 pp.)	6/29/83	(b)(7), (e)(f)	

Collection:

Record Group: Bush Presidential Records
Office: Advance, Office of
Series: Hazelrigg, Margaret J. (Peggy)
Subseries:
WHORM Cat.:
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Withdrawal/Redaction Sheet (George Bush Library)

Document No. and Type	Subject/Title of Document	Date	Restriction	Class.
01j. list	Organizing the Advance (2 pp.)	n.d.	(b)(2)	

Collection:

Record Group: Bush Presidential Records
Office: Advance, Office of
Series: Hazelrigg, Margaret J. (Peggy)
Subseries:
WHORM Cat.:
File Location: Binder: Advance Office Operations Manual

Date Closed: 8/8/2007	OA/ID Number: 06987-007
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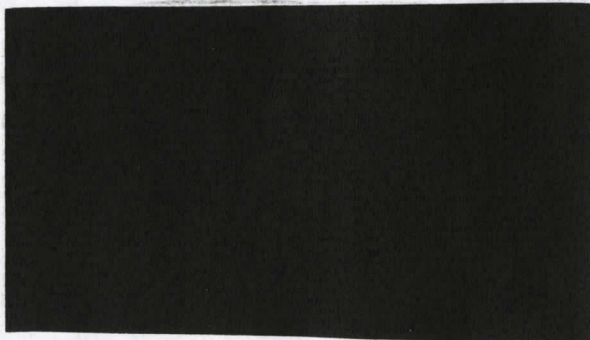
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ORGANIZING THE ADVANCE

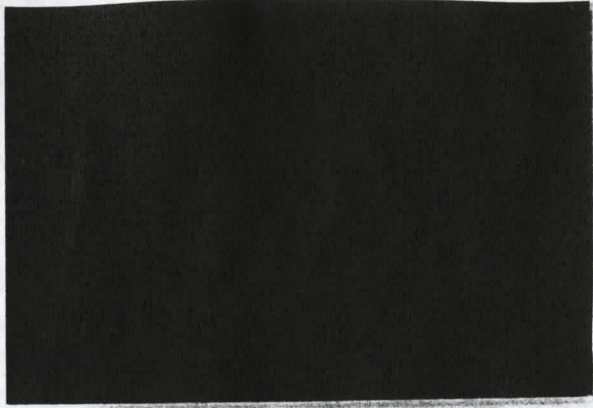
- () Set-up Field Advance Office

THE FIELD ADVANCE OFFICE: Focal point for Communication between event sponsors, the Advance Team, the White House Advance Office, and the White House Senior Staff.

- () Physical Set-up
KEY: Clean and orderly environment
 - () hotel furniture removed
 - () adjoining, connecting rooms
 - () conference tables around perimeter
 - () office supply package from Washington
- () Staff Office volunteers
KEY: Commitment, task-oriented, efficient, technical skills
 - () Lead Advanceman must brief on players, information flow, support equipment, messages, other responsibilities
- () Standard Filing System
 - () file folder with a copy of each significant piece of paperwork in each folder. All papers must be date/timed stamped.
 - () folder distribution:
 - each advanceman
 - USSS lead agent
 - Press advanceman
 - WHCA trip officer
 - Military aide
 - AF1
 - HMX
 - TV Consultant
 - Master trip file
- () General filing system organized as follows:



(b)(2)



(b)(2)

AIRPORT ARRIVAL

Airport Manager/Base Commander:

Name (*Title or Rank*) _____

(Phone) O _____ H _____

CONSIDERATIONS:

- () Military Air Base convenient
- () Sufficient space for arrival
 - () Air Force One
 - () Press Plane(s)
 - () Helicopters
 - () Motorcade
- () Do we want to open arrival (*Check with Advance Office*)
- () Adequate parking for crowds
- () Press access and parking
- () Public access to area
- () Distance from airport to major event _____ miles
 - Population of surrounding area (estimate) _____
 - Would airport crowd dilute primary event crowd. Yes ___ No ___
- () Angle of sun at *arrival time*
- () How best not disturb airport operations

NOTE: Any major problem above should be reported to Advance Office

- () Alternate airports in area
- () Obtain diagram of airport
- () Design arrival
 - () Air Force One/Press Plane
 - () President's movements
 - () Staff/Guest movements
 - () Press area - Press movements
 - () Staging and docking areas (motorcades and press buses)
 - () Greeters (holding area)
 - () List of physical requirements
 - 1.
 - 2.
 - 3.
 - 4.
 - 5.
 - 6.
- () Bad weather alternative

Withdrawal/Redaction Sheet (George Bush Library)

Document No. and Type	Subject/Title of Document	Date	Restriction	Class.
01k. list	Airport Arrival/Event Site (1 pp.)	n.d.	(b)(2)	

Collection:

Record Group: Bush Presidential Records
Office: Advance, Office of
Series: Hazelrigg, Margaret J. (Peggy)
Subseries:
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AIRPORT ARRIVAL/EVENT SITE

MOVEMENTS (Transportation)

Distance from airport/arrival site to event/hotel: _____ miles

- () Helicopters
- () Motorcade

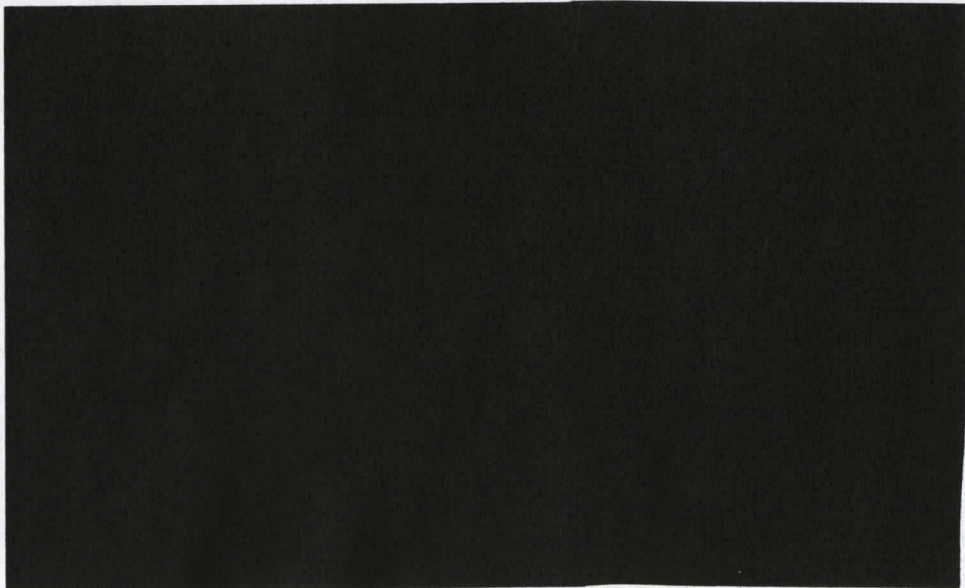
HELICOPTERS:

- () Sufficient room for Air Force One and helicopters
- () Landing area at event site locations: _____

MOTORCADE:

- () Sufficient room to form motorcade
- () Exact mileage of route: _____ miles
- () Exact times in similar conditions President will travel: _____.
- () Effect on normal commuting patterns
- () Crowd encouraged along motorcade route (*Check with Advance Office*)
- () Area population: _____
- () Where start public crowds, exact location _____.
- () Arrival docking area

- ()
- ()
- ()
- ()
- ()



(b)(2)

() Vehicle requirements:

VIP: _____

Staff: _____

Press: _____

EVENT SITE

CONSIDERATIONS:

Event Contact/Facility Manager:

Name

Phone O _____ H _____

CONSIDERATIONS:

() Number of seats or amount of space

Seats _____ Area _____

() Physical appearance

() Quality of surrounding area

() Number of parking spaces for attendances _____

() Extra parking areas available

() Attendee access

() Magnetometers (how many, calculate time to clear)

() Enthusiasm of management

() Fire regulations

() Convenient motorcade access (if applicable)

() Convenient helicopter landing site (if applicable)

() Sound system (coordinate with WHCA)

() Sufficient

() Extra requirements: _____

(approximate cost estimate): _____ political ___ official ___

() Lighting (coordinate with WHCA)

() Sufficient: 150 foot candles on speaker

100 foot candles on crowd

() Extra requirements: _____

(approximate cost estimate): _____ political ___ official ___

() Power (coordinate with WHCA)

() Sufficient

() Extra requirements: _____

(approximate cost estimate): _____ political ___ official ___

(.) Backdrop

() Size

() Color

(approximate cost estimate): _____ political ___ official ___

- Teleprompter
- Type of Podium
- Determine if live TV coverage, if so, inform Advance Office immediately. If information not available now, determine as soon as possible and relay.
- Arena staff (how many) _____ Union ___
- Overtime (cost estimate) _____
- Ability to use at *least* 24 hours prior to event
- Holding room
 - President - what should be in it (low key)
 - Platform Guests
- Staff viewing area
- Press area - press platform with appropriate tiers
- White House Press Office
- Press Secretary Office
- Transportation Office
- Press Center - separate Press entrance
- Live TV locations
- Assembly areas
- Obtain floor plan
- Presidential Movements
- Staff/Guest Movements
- Press Area - Press Movements
- Greeters
- Tickets

Considerations:

- Have we used them in area before

Yes _____ No _____

Reaction to tickets last time: _____

() Can tickets be effectively distributed

Distribution Plan: _____

List of Physical requirements and things to be built:

1. _____ 2. _____

3. _____ 4. _____

5. _____ 6. _____

7. _____ 8. _____

9. _____ 10. _____

() Storyboard (HPS) - what picture do we want

() Design event site

EVENT SITE

() Finalize event scenario/program

Analyze and determine what required based on:

- Purpose of event, goals
- Storyboard (HPS)
- Opportunity for special activities
 - Special meetings
 - Color events
 - Press/Photo opportunities
- Desired Press coverage
- Political consideration connected with event
- Times involved
- Build in Press Filing time-especially if important remarks
- Location of activities
- Programs, introductions
- Platform lists/seating diagram
- Attendance, how many/who/arrival time/tickets, etc.
- Movements required
- Holding area
- Staff working/viewing area
- Event history/background
- Who attends (participants, guest, audience, etc.)

Final Details

() Entrance/Exit movements to platform

() Band: (Name) _____

Attended rehearsal: Yes _____ No _____

"Ruffles and Florishes"
Announcement

"Hail to the Chief"

Other appropriate music (can they play it)

- () Holding Rooms: (Room number/name) _____

- () Staff Room/Office: (Location) _____
- () Press Area: (Location) _____
- () White House Press Office: (Location) _____
- () Press Secretary Office: (Location) _____
- () Sample Program (Attach)

Hotel

- () Coordinate with trip desk coordinator
- () Availability of space
- () Suitable Presidential Suite
- () Access by stewards for meals
- () Attitude of management toward visit
- () Union/Non-Union
- () Reputation/Background of hotel
- () Advantageous rates
- () Access and egress from transportation
- () Adequate elevators to move large numbers rapidly
- () Conference and meeting rooms
- () Floor plans
- () Room assignments to WHCA, Advance Office
- () Proximity to Press Hotel if this hotel not enough rooms
- () Hotel diagrams

Develop Tentative Schedule

- () Options
- () Correct times

- () Press Filing time
- () All information
- () Diagrams and floor plans

Discuss Finances with Key Contact

- () Estimate total in writing
- () Obtain agreement for sponsoring group to pay necessary costs
- () Make accurate records of all financial agreements
- () Obtain Billing address: _____

- () Communicate above to Advance Office

Realistically determine if Key Contact should become Overall Chairman

Yes _____ No _____

Discuss with Overall Chairman Committee Chairmen requirements

NOTE: The primary functions of the Advancemen are to exercise command, coordinate, control, and anticipate problems and not to try to do everything himself. **DELEGATE!**

Point out:

- () Characteristics required
- () Special knowledge required
- () Special contacts required

For the following Committee Chairmen:

Event Chairman

Potential Sub-Chairman

- Physical facilities
- Crowd control and ushers
- Decorations/"Color"
- Program/Entertainment
- Platform and VIP's
- Parking control and Ushers
- Tickets

Airport Chairman

Sub-Chairman: Same as under Event Chairman

Press Chairman

Publicity Chairman

Transportation Chairman

Hotel Chairman

Meet individually with potential Chairmen

- () Explain functions
- () List responsibilities (see checklist Committee Chairman)
- () Detail how *you* want their job done
- () Complete contact sheet (attached)

Make contact/courtesy calls with key individuals in State (only after Intergovernmental Affairs has made official call) to inform of President's visit, tentative schedule, etc. based on trip profile and guidance from Advance Office.

- () Governor
- () Mayor
- () Talk with Advance Office regarding local congressional delegation, RNC National Committee, County Chairman, etc.
- () Check with Advance Office if any other courtest calls should be made

IMPLEMENTATION OF PRESIDENTIAL ADVANCE

- () Continous communication with overall Chairman
- () Daily reports from individual Chairmen
- () Physically check progress daily each Chairman
- () Maintain daily communication with Advance Team and Advance Office -- **KEEP EVERYBODY INFORMED**
- () Remain available at all times - by phone/Page Boy/Radio. Let WHCA know where you are
- () Information submitted to the Advance Office
 - detailed staff/guest schedule
 - diagrams

- platform and guest list
- motorcades
- hotel room assignments
- important press clippings
- important background information (local color report, other events, people President to meet, local interest stories)
- any schedule change proposals with advantages, disadvantages and your recommendation
- audience composition report
- finance report with major expenses and who pays

CHECK LIST FOR COMMITTEE CHAIRMAN

Event Chairman

- () Maintain communications with Overall Chairman and Advancemen
- () Execute Advanceman's instructions
- () Control efforts of Sub-Chairman

Physical Facilities Sub-Chairman

- () Obtain necessary equipment
- () Recruit and direct workers
- () Construct site
- () Platform per specifications
- () Press area/Press platform (tiers)
- () Flags/backdrop
- () Sound/Lighting/Power (watch costs)
- () Decorate (watch costs)

Program/Entertainment Sub-Chairman

- () Develop program
- () Recruit MC (if required)
- () Advanceman approve selection
- () Coordinate entertainment with Entertainment Chairman if separate
- () Script program
- () Formalities, introductions, and speeches
- () Interject lively entertainment throughout program (if appropriate)
- () Time immediately prior to President's arrival - pad time/flexible
- () Present final program to Advancement for approval

Platform and VIP's Sub-Chairman

- () Produce platform list for Advanceman approval
- () Names to USSS

- () Proper identification
- () Assemble prior to program in holding area
- () Disseminate information to guests
- () Direct and control guests
- () Seating chart
- () Proper number of chairs on platform (have extra chairs)
- () Name tags on chairs
- () Issue credentials and tickets
- () Disseminate information to VIP's where and how get VIP treatment

Parking Control and Ushers Sub-Chairman

- () Recruit volunteers
- () Identify parking volunteers and ushers
- () Organize parking and crowd access plan in conjunction with USSS/Local Police
- () Place directional signs
- () Implement parking plan

Ticket Sub-Chairman

- () Who will print
- () How many
- () Distribution plan

Airport Chairman

- () Control efforts of sub-chairman - same as Event Chairman
- () Maintain communications with Overall Chairman and Advanceman
- () Execute Advanceman's instructions

Publicity Chairman

NOTE: Decide if a separate chairman needed to credential local press

- () Assist Press Advanceman
- () Overall plan to publicize the President's trip

- () Coordinate with Press Advanceman/Office
- () News release plan (must be approved)
 - () New story *each* day
 - () Nothing released without Advanceman approval
- () Free radio and television publicity
- () Arrival day newspaper story
 - () Pictures
- () Credential Local Press; establish time, place, etc. for credentials
- () Keep Local Press informed of President's visit
- () With Advanceman develop coverage of event

Transportation Chairman

- (.) Coordinate with USSS
 - () Vehicle requirements
 - () Drivers
- () Obtain extra cars and drivers for emergencies
- () Help form motorcade
- () Assist getting people to correct vehicles
- () Provide motorpool requirements for overnights

Hotel Chairman

- () Coordinate with Advanceman hotel requirements
- () Coordinate with Press Advanceman Press hotel requirements
- () Provide necessary office equipment for staff office/press room
- () Label rooms/keys in doors or distribution plan
- () Newspapers in rooms
- () National and Local News Listing taped to T.V.
- () Print rooming list/*fact sheet*
- () Arrange hotel services

- () Assist Stewards
- () Coordinate baggage with hotel and White House Baggage man

MEETINGS AND CONFERENCE CALLS

- () Daily Advance Team Staff Meetings Attendees:
 - each advancement
 - lead USSS agent-site agents (optional, decision of lead agent)
 - WHCA trip officer - site officer (optional)
 - Military Aide - AF1, HMX, stewards
 - Press advancement
 - transportation office
 - others (lead advancement decides)
- () Daily meeting with key local contacts

NOTE: Ideally scheduled immediately following advance staff meeting.

Attendees: Lead advancement determines

NOTE: For both meetings, if staff office secretary good, include to take notes.
- () Daily advancement meeting. Evening meeting to review day's activities especially for advancement trainees.
- () Daily report to Director to Advance Office
- () Final call preferably before countdown meeting to:
 - David Fischer
- () Countdown meeting
 - early evening (before 8 p.m.) night before event
 - final staff/guest schedule with diagrams should be used as agenda
 - focus on the coordination aspect of each event
 - attendees:
 - each advancement
 - lead USSS agent

site USSS agents
press advancement
WHCA trip officer
Military Aide - AF1, HMX, stewards
transportation advance
TV consultant

- () Final advancement meeting
 - discuss each advancement's specific responsibility and location for each stage of the event
- () Conference call to AF1 (if necessary)
 - lead advancement
 - Michael McManus
 - David Fischer

FINAL CHECK LIST

Airport

- () Layout
 - () Air Force One spotted
 - () Staff Telephone ready
 - () Motorcade formed
 - () Helicopters spotted
 - () Baggage truck and handlers ready
- () Press area
- () Audio Visual systems functioning (if required)
- () Sound
 - () Contingency microphone
- () Light
- () Power

- () Live TV Cameras
 - () Air Force One
 - () Greeters
- () Reception committee briefed
- () Reception committee together and ready to move
- () Toe Marks
- () Information to Air Force One/McManus/Fischer
- () Disturbing movements eliminated
- () Bad weather alternative - umbrellas

Motorcade.

- () Formed properly (see motorcade alignment next page)
- () Labeled (per next page)
- () 1,000 mile minimum (if possible)
- () Fully fueled and cleaned
- () Contingency plan for disabled vehicle
- () Route survey completed immediately prior to departure (if required)
 - () Information to Director of Advance Office
- () Radio communication between vehicles
- () Staff/guests escort - preferably Advanceman
- () Staff transportation at all times will disembark passengers at convenient locations

Withdrawal/Redaction Sheet (George Bush Library)

Document No. and Type	Subject/Title of Document	Date	Restriction	Class.
011. contact sheet	The Standard Motorcade (2 pp.)	n.d.	(b)(7), (e)(f)	

Collection:

Record Group: Bush Presidential Records
Office: Advance, Office of
Series: Hazelrigg, Margaret J. (Peggy)
Subseries:
WHORM Cat.:
File Location: Binder: Advance Office Operations Manual

Date Closed: 8/8/2007	OA/ID Number: 06987-007
FOIA/SYS Case #: 2007-0753-F	Appeal Case #:
Re-review Case #:	Appeal Disposition:
P-2/P-5 Review Case #:	Disposition Date:
AR Case #:	MR Case #:
AR Disposition:	MR Disposition:
AR Disposition Date:	MR Disposition Date:

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]
P-3 Release would violate a Federal statute [(a)(3) of the PRA]
P-4 Release would disclose trade secrets or confidential commercial or financial information [(a)(4) of the PRA]
P-5 Release would disclose confidential advice between the President and his advisors, or between such advisors [(a)(5) of the PRA]
P-6 Release would constitute a clearly unwarranted invasion of personal privacy [(a)(6) of the PRA]

C. Closed in accordance with restrictions contained in donor's deed of gift.

PRM. Removed as a personal record misfile.

Freedom of Information Act - [5 U.S.C. 552(b)]

(b)(1) National security classified information [(b)(1) of the FOIA]
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(b)(9) Release would disclose geological or geophysical information

Event

Physical Facilities

- Platform
 - Decorated
 - Proper number of seats with name tags (extra seats available)
 - U.S. and Presidential flags
 - Teleprompter
 - Podium
 - President's speech
 - backdrop
 - Lighted (150-200 foot candles on speaker)
 - Sound
 - Access clear
- Directional signs in place
- Press area
 - Access clear
 - Platform
 - Power
 - Mult
 - Tables
 - Phones
 - Locations labeled
- Decorations completed
- Necessary people in place and briefed
 - Ushers
 - Band(s)
 - Platform guests

- () Public access/entrances clear and moving
- () Camera angle areas filled first
- () Empty seats filled/draped
- () Program on time
- () Arrival point ready and clear
- () Holding room checked
- () Halls clear except essential people
- () Staff entrance, access and egress marked and clear of people, escorts ready
- () President's movements
 - () Normal
 - () Alternate
- () Leave a minute or two for President to be briefed
- () Rehearsal conducted - all parties involved in introduction sequence
- () Communication with platform
- () President's entrance and honors sequence pat
 - () Move to pre-determined spot
 - () Live TV cue
 - () "Ruffles and Flourishes"
- () Announcement (WHCA)
 - () Include people entering with President
- () "Ruffles and Flourishes"
- () The President moves
- () "Hail to the Chief" should be played
 - () Twice
 - () Until applause begins to subside
 - () President center stage - band must stop

- () Introduction sequence
- () Motorcade/Helicopter ready
- () Exit
 - () Band leader cued
 - () Lively tune - 5 minues

Hotel

- () Latest rooming list to WHCA
- () Pre-registered
- () Name signs and keys available
- () Rooming list/fact sheet in rooms and halls
- () Newspapers in Rooms
- () National and Local News Listing Taped to T.V.
- () Elevators on standby
- () Offices equipped
- () Extra rooms
- () Available
 - () Laundry
 - () Valet
 - () Food service
- () Meal service requirements for WH stewards
- () Motorpool
- () Baggage handlers ready with room list
- () Staff floor security 24 hours

Other Events (Also see Event Site Section)

Meetings

- Press areas/Press movements
- Holding room
- Entrance
- Introduction
- Conference Table
 - Proper number seats
 - Labeled - name cards
 - Flags (if appropriate)
 - Seats for attendees
 - Supplies
 - Determine audio requirements

Dinners

- Press areas/Press movements
- Holding room
- Entrance
- Introduction
- Head Table
- Stewards - meal service
- Program on schedule

Post Trip

- Local Media Report
- Thank yous
 - Names, address, and what they did, was President introduced or did he meet
 - Bands - directors name, address, what they did

Gifts

- Accepted for President
- Names giver, address
- Folder of all materials, for Advance Office Master file
- Names of people worth working with again/avoid send to Advance Office. List with Trip Report
- Other information that would help future trips, etc. (Trip Report TAB G)
- Report on trip to Advance Office within 48 hours, including follow-up newspaper clippings (Trip Report TAB G)
- Trainee Evaluation form completed
- Financial Report completed
- Advanceman personal thank yous

TRIP CHECKLIST

TRIP: _____

DATE(S): _____

	<u>DATE</u>
_____ Memo request to Hickey for pre-advance aircraft	_____
_____ Pre-Advance Itinerary/Files	_____
_____ Press Credentials	_____
_____ Hotel selected/reservations	_____
_____ Hotel notification to USSS, Admin., Military, WHCA, Transportation	_____
_____ Deaver Memorandum	_____
_____ Press Announcement	_____
_____ Trip Meeting	_____
_____ * Briefing papers assigned	
_____ Senior Staff Memorandum with draft summary or detailed schedule	_____
_____ * Courtesy calls for schedule changes	
_____ Speech reviewed and dacommed to Advance	_____
_____ Briefing papers received	_____
_____ Traveling Guest/Staff Memo distributed	_____
_____ Deaver Briefing	_____
_____ Schedule Distribution	_____
_____ Personal Schedule	_____
_____ Final copies to: Bill/Grey/Charles and dacommed to Advance	_____

EVENT CHECKLIST

EVENT: _____

DATE(S) : _____

	<u>DATE</u>
_____ Walk-through scheduled	_____
_____ * Transportation arranged	_____
_____ * USSS/Military Aide/WHCA, etc. notified	_____
_____ Deaver Memorandum	_____
_____ Press Announcement	_____
_____ Speech received/reviewed	_____
_____ Briefing paper received	_____
_____ Deaver Briefing	_____
_____ Schedule Distribution	_____
_____ Personal Schedule	_____
_____ Final copies to: Bill/Grey/Charles/ Advance	_____

Withdrawal/Redaction Sheet (George Bush Library)

Document No. and Type	Subject/Title of Document	Date	Restriction	Class.
01m. Contacts	National Hotel Contacts (1 pp.)	n.d.	(b)(2)	

Collection:

Record Group: Bush Presidential Records
Office: Advance, Office of
Series: Hazelrigg, Margaret J. (Peggy)
Subseries:
WHORM Cat.:
File Location: Binder: Advance Office Operations Manual

Date Closed: 8/8/2007	OA/ID Number: 06987-007
FOIA/SYS Case #: 2007-0753-F	Appeal Case #:
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RESTRICTION CODES

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C. Closed in accordance with restrictions contained in donor's deed of gift.

PRM. Removed as a personal record misfile.

Freedom of Information Act - [5 U.S.C. 552(b)]

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- (b)(8) Release would disclose information concerning the regulation of financial institutions [(b)(8) of the FOIA]
- (b)(9) Release would disclose geological or geophysical information

Withdrawal/Redaction Sheet (George Bush Library)

Document No. and Type	Subject/Title of Document	Date	Restriction	Class.
01n. Contacts	Individual Hotel Contacts (1 pp.)	n.d.	(b)(2)	

Collection:

Record Group: Bush Presidential Records
Office: Advance, Office of
Series: Hazelrigg, Margaret J. (Peggy)
Subseries:
WHORM Cat.:
File Location: Binder: Advance Office Operations Manual

Date Closed: 8/8/2007	OA/ID Number: 06987-007
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PRELIMINARY TRIP PROFILE

Event: _____

Place: _____

Date/Time: _____

Purpose of Trip: _____

Events/Optional Events:

A. _____

B. _____

C. _____

D. _____

E. _____

Proposed Guest and Staff to accompany The President:

<u>Congressional</u>	<u>Cabinet/VIP Guest</u>	<u>Non-Traveling WHS</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Traveling WHS

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

Aircraft (AF1, Backup, Press)

MHX (Standard, extra)

Vehicles (Standard, extra)

Flight Time: (Aircraft/HMX)

Time/Change

To: _____
To: _____
To: _____
To: _____
To: _____

From: _____
From: _____
From: _____
From: _____
From: _____

/ _____
/ _____
/ _____
/ _____
/ _____

Background Information

Theme/Rationale/Political Rationale (Administration Goals and Strategies to be Highlighted)

Media Objectives/Storyboard (HPS: headline, picture, story)

Political Objectives

Financing (Political/Official: Tentative allocation of cost; Event host responsibilities)

Audience Composition/Estimated Crowd

Crowd raising required, if so, how _____

Check Advance Office files and other sources for:

Previous stops: Event/Date _____
Event/Date _____
Event/Date _____

Meeting sites and hotels: _____

Key Event Contacts:

Event: _____
(Name) _____ (Position) _____
(Phone) O _____ H _____

Event: _____
(Name) _____ (Position) _____
(Phone) O _____ H _____

Key State Contacts:

GOP Chairman _____
(Phone) O _____ H _____

National Committeeman: _____
(Phone) O _____ H _____

National Committeewoman: _____
(Phone) O _____ H _____

County Chairman: _____

(Phone) O _____ H _____

Congressional Delegation:

Staff Contact

_____ ()	_____ Phone
_____ ()	_____ Phone
_____ ()	_____ Phone
_____ ()	_____ Phone

Other Contacts:

Governor: _____ () Phone _____

Staff Contact: _____

Others:

(Name) _____ (Position) _____

(Phone) O _____ H _____

(Name) _____ (Position) _____

(Phone) O _____ H _____

Advance Team:

Staff Advance: Lead _____

Other _____

Press Advance: _____

TV Consultant: _____

USSS: Lead _____

Other _____

Military Office:

Aide: _____

WHCA: Trip Officer: _____

Site: _____

Air Force One: _____

Helicopter: _____

Other: _____

Contractors:

Lighting: Use again _____ Avoid _____

(Name) _____

(Phone) O _____ H _____

Sound: Use again _____ Avoid _____

(Name) _____

(Phone) O _____ H _____

Decorations: Use again _____ Avoid _____

(Name) _____

(Phone) O _____ H _____

Construction: Use again _____ Avoid _____

(Name) _____

(Phone) O _____ H _____

Comments/Other data:

Withdrawal/Redaction Sheet (George Bush Library)

Document No. and Type	Subject/Title of Document	Date	Restriction	Class.
01o. Contacts	Trip Meeting Contact List (1 pp.)	n.d.	(b)(7), (e)(f)	

Collection:

Record Group: Bush Presidential Records
Office: Advance, Office of
Series: Hazelrigg, Margaret J. (Peggy)
Subseries:
WHORM Cat.:
File Location: Binder: Advance Office Operations Manual

Date Closed: 8/8/2007	OA/ID Number: 06987-007
FOIA/SYS Case #: 2007-0753-F	Appeal Case #:
Re-review Case #:	Appeal Disposition:
P-2/P-5 Review Case #:	Disposition Date:
AR Case #:	MR Case #:
AR Disposition:	MR Disposition:
AR Disposition Date:	MR Disposition Date:

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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TRIP MEETING CONTACT LIST

<u>OFFICE</u>	<u>EXT.</u>	<u>CONTACT</u>	<u>ATTENDEE</u>
Advance	7565		Bill Henkel Charles Bakaly Trip Coordinator
Leg. Affairs	2230	Lynn Skolnick	Lynn Skolnick
Mike McManus	6687	Margie Crawford	Mike McManus
Military Office	2150	Military Aide	John Nettles WHCA Trip Officer Military aide
Personnel	7060	Bob Tuttle	Bob Tuttle
Photo Office	6709	Carol Greenawalt	Carol Greenawalt
Press Office	2100	Mark Weinberg	Mark Weinberg
Scheduling	7560	Fred Ryan	Fred Ryan
Speechwriting	6266	Nancy Roberts	Researcher Speechwriter
Transportation	2250	Billy Dale	Billy Dale
			
WH Admin.	2500	Julie Brink	Theresa Elmore
WH Counsel	7803	Sherrie Cooksey	Sherrie Cooksey

(b)(7)
(e)(f)

OPTIONAL DEPENDING UPON EVENT/CIRCUMSTANCE:

Intergovernmental Affairs	7943	Rick Neal	Rick Neal
Public Liaison	7140	Jack Courtemanche	Jack Courtemanche
Cabinet Affairs	2800	Patsy Faoro	Patsy Faoro
Pol. Affairs	7620	Caron Jackson	Caron Jackson
Private Sector Initiatives	6676	Michael Castine	Michael Castine

Withdrawal/Redaction Sheet

(George Bush Library)

Document No. and Type	Subject/Title of Document	Date	Restriction	Class.
01p. Checklist	State/Working Visits Checklist (1 pp.)	n.d.	(b)(7), (e)(f)	

Collection:

Record Group: Bush Presidential Records
Office: Advance, Office of
Series: Hazelrigg, Margaret J. (Peggy)
Subseries:
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P-6 Release would constitute a clearly unwarranted invasion of personal privacy [(a)(6) of the PRA]


C. Closed in accordance with restrictions contained in donor's deed of gift.

PRM. Removed as a personal record misfile.

Freedom of Information Act - [5 U.S.C. 552(b)]

(b)(1) National security classified information [(b)(1) of the FOIA]
(b)(2) Release would disclose internal personnel rules and practices of an agency [(b)(2) of the FOIA]
(b)(3) Release would violate a Federal statute [(b)(3) of the FOIA]
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(b)(9) Release would disclose geological or geophysical information

STATE/WORKING VISITS CHECKLIST

- ____ PROTOCOL OFFICE (632-1276)
Assigned protocol officer can provide meeting times, information on interpretation, meeting participants, etc.
- ____ NSC (Chuck Tyson/x.3440)
Can provide meeting times, information on interpretation, meeting participants, etc.
- ____ WHCA (x.4220)
Provides audio support
- ____ USHERS' OFFICE (x.2650)
Handles all set-up for ceremonies (except arrivals) including platform, ropes and stantions
- ____ MDW (Tom Groppl/693-0636)
In charge of all troop movements plus actual set-up on South Grounds for arrival ceremonies
- ____ SOCIAL OFFICE (G. Hodges/L. Faulkner/x.7064)
Will order toecards; handles all social aspects of visits
- ____ PRESS OFFICE (Robin Grey/ x.2100)
Check placement of platforms and any special requirements
- ____  (b)(7)
(e)(f)
- ____ DAVID FISCHER (x.2168)
Must be fully briefed; Dave also coordinates interpretation in the meetings and for remarks
- ____ MILITARY AIDE (x.2150)
Liaison to MDW, Military Band, etc. Also must be fully briefed
- ____ WEST LOBBY RECEPTIONIST (Nell Yates/x.2605)
To hold Roosevelt Room
- ____ WEST LOBBY USHER (Carl/x.2275)
For help with problems, coordinates red carpet placement
- ____ GSA (Dan Cooper/x.3154)
Red carpet

Withdrawal/Redaction Sheet (George Bush Library)

Document No. and Type	Subject/Title of Document	Date	Restriction	Class.
01q. Checklist	In-House Event Checklist (1 pp.)	n.d.	(b)(7), (e)(f)	

Collection:

Record Group: Bush Presidential Records
Office: Advance, Office of
Series: Hazelrigg, Margaret J. (Peggy)
Subseries:
WHORM Cat.:
File Location: Binder: Advance Office Operations Manual

Date Closed: 8/8/2007	OA/ID Number: 06987-007
FOIA/SYS Case #: 2007-0753-F	Appeal Case #:
Re-review Case #:	Appeal Disposition:
P-2/P-5 Review Case #:	Disposition Date:
AR Case #:	MR Case #:
AR Disposition:	MR Disposition:
AR Disposition Date:	MR Disposition Date:

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IN-HOUSE EVENT CHECKLIST

_____ PROJECT OFFICER(S)


_____ PRESS OFFICE (Robin Grey/x.2100)

_____ RESIDENCE USHERS' OFFICE (x.2650)

OR _____ W.W. USHERS' OFFICE (Carl/x.2275)

OR _____ GSA (Dan Cooper/x.3154)

_____ WHCA (x.4220)

_____ 

(b)(7)
(e)(5)

_____ SOCIAL OFFICE (G. Hodges/L. Faulkner/x.7064)
Optional depending on event location

_____ DAVID FISCHER (x.2168)

_____ MILITARY AIDE (x.2150)

TRAINEE EVALUATION REPORT

Trainee _____

Lead Advanceman (evaluator) _____

5 = Outstanding	Many positive instances of this attitude
4 = Above Average	High, but not outstanding
3 = Average	Mixture of plusses and minuses
2 = Below Average	More negative, but not bottom
1 = Low	Inadequate

Analytical Skills (i.e. problem solver, good with details, understands big picture, etc.)

High					Low
5	4	3	2	1	

Comments: _____

Mental Alertness/Quickness (i.e. quick in thought, ability to organize quickly, respond logically, etc.)

High					Low
5	4	3	2	1	

Comments: _____

Initiative/Risk Taker (i.e. innovative, inquisitive, assumes responsibilities, not afraid of calculated risks, a leader, etc.)

High			Low	
5	4	3	2	1

Comments: _____

Organization Skills (i.e. works well under pressure, prioritizes, sets goals, able to keep many balls in air, etc.)

High			Low	
5	4	3	2	1

Comments: _____

Flexibility (i.e. open, adjustable to changes, receptive to new ideas, etc.)

High			Low	
5	4	3	2	1

Comments: _____

Energy (i.e. tenacious, competitive, willing to work long hours, self-motivated, enthusiastic, hard worker, etc.)

High				Low	
5	4	3	2	1	

Comments: _____

Communication Skills (i.e. speaks clearly, logically, concisely, good writing skills, etc.)

High				Low	
5	4	3	2	1	

Comments: _____

Maturity (i.e. can handle frustration, pressure, results oriented, is suitable representative of the President, etc.)

High				Low	
5	4	3	2	1	

Comments: _____

**TRIP REPORT
(Narrative Memorandum)**

EVENT

Location
Date

ADVANCE TEAM (list)

Lead Advance
Advance
Trainees
Lead USSS
Press Advance
Transportation Advance
Military Aide
WHCA Trip Officer
Others

LOCAL CONTACTS/CONTRACTORS (See attached form to be completed as tab)

Name
Address
Telephone Number
Area of Responsibility
Use Again _____ Why _____

Comments _____

GENERAL OUTLINE OF TRIP - Positive Points and Analysis of any Problem(s)

Arrival
Motorcades
Other Transportation
Events
Crowd Situations
Hotel
Departure

EVALUATION OF FACILITIES - Positive Points and Analysis of any Problems

Airport
Event Site(s)
Hotel

FINANCES

List Major Expenses

Who Responsible

Any Problems

COMMENTS ON W.H. SUPPORT GROUP/TEAM

CONCLUSION

Did event achieve the scheduling purpose - media, admin. program, political, etc.

Lessons learned (if any)

Recommendations

Summary Evaluation (one sentence)

EXPENSE REPORTS

Upon return from an advance, you should submit either:

- a) a "Travel Voucher" for Official travel (Attachment A), or
 - b) a "Weekly Report for Political Expenses" (Attachment B)
- to claim for any expenses incurred and to claim for per diem.

Attachments A and B show what information needs to be filled out and what information is not necessary.

Essential information includes:

- Name / Address
- Social Security Number
- Authorization Number
- Dates of travel
- Transportation (mode, points of travel)
- Date and time of departure from residence
- Date and time of return to residence

For Presidential travel, it is not necessary to itemize expenses; however, if you wish to claim mileage, taxis, official phone calls (applies only when WHCA is not set up), etc., you should submit receipts where possible and list these items on your voucher according to the date.

Unreimbursable items include:

- Unofficial phone calls
- Tips
- Laundry / Pressing
- Tax (On official advances only, if you pay for lodging, be aware that you will not be reimbursed for any tax for which you might have been charged - the government is tax exempt.)
- Insurance (On official advances only, if you pay for your rental car and have accepted insurance, be aware that you will not be reimbursed for any insurance for which you might have been charged - the government is "self-insured".)

TRAVEL VOUCHER <small>(Read the Privacy Act statement on the back)</small>		1. DEPARTMENT OR ESTABLISHMENT, BUREAU DIVISION OR OFFICE <p style="text-align:center">EOP</p>		2. TYPE OF TRAVEL <input type="checkbox"/> TEMPORARY DUTY <input type="checkbox"/> PERMANENT CHANGE OF STATION		3. VOUCHER NO. 4. SCHEDULE NO.							
TRAVELER (PAYEE)	a. NAME (Last, first, middle initial) <p style="text-align:center">DOE, John</p>			b. SOCIAL SECURITY NO. <p style="text-align:center">123-44-5678</p>		6. PERIOD OF TRAVEL a. FROM Oct. 31 b. TO Nov. 5							
	c. MAILING ADDRESS (Include ZIP Code) 860 Park Avenue New York City, NY			d. OFFICE TELEPHONE NO. <p style="text-align:center">212/000-0000</p>		7. TRAVEL AUTHORIZATION a. NUMBER(S) b. DATE(S) (from T.A.)							
	e. PRESENT DUTY STATION			f. RESIDENCE (City and State)		10. CHECK NO.							
8. TRAVEL ADVANCE				9. CASH PAYMENT RECEIPT				11. PAID BY					
a. Outstanding				a. DATE RECEIVED		b. AMOUNT RECEIVED							
b. Amount to be applied						\$							
c. Amount due Government (Attached: <input type="checkbox"/> Check <input type="checkbox"/> Cash)				c. PAYEE'S SIGNATURE									
D. Balance outstanding													
12. GOVERNMENT TRANSPORTATION REQUESTS, OR TRANSPORTATION TICKETS, IF PURCHASED WITH CASH <small>(List by number below and attach passenger coupon; if cash is used show claim on reverse side.)</small>		I hereby assign to the United States any right I may have against any parties in connection with reimbursable transportation charges described below, purchased under cash payment procedures (FPMR 101-7) ▶ Traveler's Initials											
		AGENT'S VALUATION OF TICKET <small>(a)</small>	ISSUING CARRIER <small>(Initials)</small> <small>(b)</small>	MODE, CLASS OF SERVICE AND ACCOMMODATIONS <small>(c)</small>	DATE ISSUED <small>(d)</small>	POINTS OF TRAVEL							
						FROM <small>(e)</small>	TO <small>(f)</small>						
Commercial						New York City	Los Angeles, CA						
Commercial						Los Angeles, CA	New York City, NY						
13. I certify that this voucher is true and correct to the best of my knowledge and belief, and that payment or credit has not been received by me. When applicable, per diem claimed is based on the average cost of lodging incurred during the period covered by this voucher.													
TRAVELER SIGN HERE ▶						DATE		AMOUNT CLAIMED ▶		\$			
NOTE: Falsification of an item in an expense account works a forfeiture of claim (28 U.S.C. 2514) and may result in a fine of not more than \$10,000 or imprisonment for not more than 5 years or both (18 U.S.C. 287; i.d. 1001).													
14. This voucher is approved. Long distance telephone calls, if any, are certified as necessary in the interest of the Government. (NOTE: If long distance telephone calls are included, the approving official must have been authorized in writing by the head of the department or agency to so certify (31 U.S.C. 680a).)						17. FOR FINANCE OFFICE USE ONLY COMPUTATION							
APPROVING OFFICIAL SIGN HERE ▶						a. DIFFERENCES, IF ANY (Explain and show amount)						\$	
DATE													
15. LAST PRECEDING VOUCHER PAID UNDER SAME TRAVEL AUTHORIZATION						b. TOTAL VERIFIED CORRECT FOR CHARGE TO APPROPRIATION							
a. VOUCHER NO.		b. D.O. SYMBOL		c. MONTH & YEAR		Certifier's initials:						\$	
16. THIS VOUCHER IS CERTIFIED CORRECT AND PROPER FOR PAYMENT						c. APPLIED TO TRAVEL ADVANCE (Appropriation symbol):						\$	
APPROVING OFFICIAL SIGN HERE ▶						DATE							
						d. NET TO TRAVELER ▶						\$	
18. ACCOUNTING CLASSIFICATION													

INSTRUCTIONS TO TRAVELER (Unlisted items are self-explanatory)

Col. (c) If the voucher includes per diem allowances for members of employee's immediate family, show members' names, ages, and relationship to employee and marital status of children (unless information is shown on the travel authorization.)

Col. (d) Show amount incurred thru (g) meal cost.

(h) Show expenses, such as: laundry, cleaning and pressing of clothes, tips to bellboys, porters, etc. (other than for meals). Complete for per diem and actual expense travel.

(i) Show total subsistence expense incurred for actual expense travel.

(j) Show per diem amount, limited to maximum rate, or if travel on actual expense, show the lesser of the amount from col. (j) or maximum rate.

(m) Show expenses, such as: taxi/limousine fares, air fare (if purchased with cash), local or long distance telephone calls for Government business, car rental, relocation other than subsistence, etc.

Col. (d) Show amount incurred thru (g) meal cost.

(h) Show expenses, such as: laundry, cleaning and pressing of clothes, tips to bellboys, porters, etc. (other than for meals). Complete for per diem and actual expense travel.

(i) Show total subsistence expense incurred for actual expense travel.

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(m) Show expenses, such as: taxi/limousine fares, air fare (if purchased with cash), local or long distance telephone calls for Government business, car rental, relocation other than subsistence, etc.

Complete this information if this is a continuation of sheet.

TRAVEL AUTHORIZATION NO.

TRAVELER'S LAST NAME

DATE

TIME

DESCRIPTION

BREAK FAST (d)

LUNCH (e)

DINNER (f)

TOTAL (g)

MISCELLANEOUS SUBSISTENCE (h)

LODGING (i)

TOTAL SUBSISTENCE EXPENSE (j)

MILEAGE RATE: NO. OF MILES (k)

MILEAGE (l)

SUBSISTENCE (m)

OTHER (n)

AMOUNT CLAIMED

AMOUNT CLAIMED

AMOUNT CLAIMED

AMOUNT CLAIMED

19 83

8:00

am dpt. residence en route JFK Airport

3 00 cat

11/1

9:00

am dpt. JFK en route Los Angeles, CA via UA flt. 19

11/2

11/3

11/4

11/5

8:30 am dpt. LAX en route New York, NY via AA flt. 2

6:30 pm arr. residence

3 00 cat

Enter grand total of columns (l), (m) and (n), below and in item 13 on the front of this form.

TOTAL AMOUNT CLAIMED

STANDARD FORM 1012 BACK (10-77)

U.S. G.P.O. 1982-361-526/8092

WEEKLY REPORT FOR POLITICAL EXPENSES

Name: John DOE

Permanent Address: 860 Park Avenue
New York City, NY

Social Security No. 123-44-5678

Self Employed: YES NO

NO. (from Travel Authorization)

DATE: Nov. 7, 1983

Week Ending 5 Nov. 1983
Cash Expenses

Expense Item	Sunday	10/31 Monday	11/1 Tuesday	11/2 Wednesday	11/3 Thursday	11/4 Friday	11/5 Saturday	TOTALS
1. Breakfast								
2. Lunch								
3. Dinner								
4. Hotel								
5. Tips								
6. Taxi & Rent								
7. Tel & Tel								
8. Transportation								
9. Entertainment								
10. Miscellaneous		3.00 cab					3.00 cab	\$6.00 cab
11. Per Diem		W I L L B E F I L L E D O U T B Y R N C						
12. Total Cash Expenses								

***Details of Transportation & Entertainment**

8. Transportation	Date	From-To	Method Used	Purpose	COST
Taxi	10/31	8:00 am dpt. Residence en route JFK			
Commercial	10/31	9:00 am dpt. JFK en route Los Angeles, CA via UA flt. 19			
Commercial	11/5	8:30 am dpt. LAX en route NYC, NY via AA flt. 2			
Taxi		6:30 pm arr. residence			
Time Returned Office/Residence:					
9. Entertainment	Date	Name of Person(s)	Where Entertained	Purpose	COST
THIS SECTION DOES NOT APPLY					

John Doe
Requesting Signature

White House Political Affairs or VP's Office /Approved by

White House Department Head/Approved by

Political Approval

**WHITE HOUSE ADVANCE OFFICE
CHECKLIST**

- President
- First Lady Trip To _____ Date(s) _____
- Other: _____

HOTEL(S):

- Name _____
- Contact _____
- Telephone Number _____
- Rate: Room _____; Suite _____
- Room Assignments to:
 - Hotel
 - WH Administrative Office

Preliminary Hotel Bill Secured

Other Hotel Charges:

Charge for	Amount	Authorized by	To Be Paid By

Special Guests:

Name	To Be Paid by

CAR RENTALS

- Company(ies) used: _____
- Total number of cars rented _____
- Rented for the period of _____
- All rental receipts attached

MISCELLANEOUS EXPENSES

Vendor	Item	Amount	Auth. By	To Be Paid By

List of all volunteers associated with trip enclosed

All bills are to be sent directly to:
The Administrative Office
The White House

Signature of Lead Advance

LOCAL CONTACTS/CONTRACTORS

Event: _____

Location: _____

Date: _____

Name _____

Address _____

Telephone Number O _____ H _____

Area of Responsibility: _____

Use Again _____ Avoid _____ Why _____

Comments _____

Name _____

Address _____

Telephone Number O _____ H _____

Area of Responsibility: _____

Use Again _____ Avoid _____ Why _____

Comments _____

Name _____

Address _____

Telephone Number O _____ H _____

Area of Responsibility: _____

Use Again _____ Avoid _____ Why _____

Comments _____

Name _____

Address _____

Telephone Number O _____ H _____

Area of Responsibility: _____

Use Again _____ Avoid _____ Why _____

Comments _____

Name _____

Address _____

Telephone Number O _____ H _____

Area of Responsibility: _____

Use Again _____ Avoid _____ Why _____

Comments _____

Name _____

Address _____

Telephone Number O _____ H _____

Area of Responsibility: _____

Use Again _____ Avoid _____ Why _____

Comments _____

THE WHITE HOUSE
WASHINGTON

March 22, 1983

MEMORANDUM TO ADVANCE STAFF
FROM WILLIAM HENKEL
SUBJECT MOTORCADE CHANGE

Please note the following changes in the motorcade line-up:

In-town Events - WHCA will precede Press Vans.

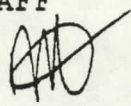
Out-of-town Events - WHCA will follow Support as part of the secure package.

THE WHITE HOUSE

WASHINGTON

March 10, 1983

MEMORANDUM FOR THE ADVANCE STAFF

FROM: WILLIAM HENKEL 

SUBJECT: Local Media Follow-up

In a conversation with Jim Baker today, I told him about the outstanding local media coverage the President has been receiving recently, i.e., Boston, Klamath Falls, Orlando, etc.

We further discussed the need to disseminate this information within the White House. It is my idea to have a supplemental page or two inserted in The White House News Summary a day or two after the event. If this is to be done, we will need to do a more responsible job of collecting local newspapers and getting them back to the Advance Office immediately after the trip.

Also, I want the Post Trip Local Media Report completed. (See attached copy.)

THE WHITE HOUSE
WASHINGTON

March 10, 1983

MEMORANDUM FOR THE ADVANCE STAFF

FROM: WILLIAM HENKEL ~~WH~~
SUBJECT: Staff Offices

On Presidential visits, in the future I want only one White House Advance/Staff office unless the overnight is in the middle of a trip and the Advance Office will be functioning to produce schedules, etc.

It is imperative that the lead advance or hotel site person submit to the WHCA switchboard, and more importantly to the hotel switchboard, a list of all traveling guests and staff. Also, an instruction should be given to the hotel switchboard that during work hours, outside calls to the hotel be directed to the Staff Office.

Staff office volunteers must do a better job of taking messages and soliciting information. Remember, the caller cannot differentiate between a volunteer and a member of the White House staff. Therefore, our volunteers must be courteous and efficient in order to maintain the image of the White House.

All calls to the President or senior staff should be referred to Shirley Moore or the other White House secretaries traveling. I expect Shirley Moore's message envelop to receive special attention.

cc: M. McManus
S. Moore

THE WHITE HOUSE
WASHINGTON

March 10, 1983

MEMORANDUM FOR THE ADVANCE STAFF

FROM: WILLIAM HENKEL *WH*

SUBJECT: Files

Not only should there be two copies of every schedule, but I can't stress to you how important it is to keep all the necessary information on the event in that file for the future.

Many times we return to a place or repeat an event and when we check the file for contacts, etc., they are not in there. Each advance person should make a concerted effort to note the names of contacts, problems incurred and give any miscellaneous info such as maps, etc. to the Trip Desk so that it can put it in the file.

cc: M. McManus

Withdrawal/Redaction Sheet

(George Bush Library)

Document No. and Type	Subject/Title of Document	Date	Restriction	Class.
01r. memo	William Henkel to Advance Office Staff (2 pp.)	2/7/83	(b)(2), (b)(7),(e)(f)	

Collection:

Record Group: Bush Presidential Records
Office: Advance, Office of
Series: Hazelrigg, Margaret J. (Peggy)
Subseries:
WHORM Cat.:
File Location: Binder: Advance Office Operations Manual

Date Closed: 8/8/2007	OA/ID Number: 06987-007
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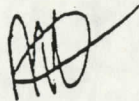
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THE WHITE HOUSE

WASHINGTON

February 7, 1983

MEMORANDUM FOR KENNETH M. DUBERSTEIN
DAVID R. GERGEN
EDWARD J. ROLLINS
RICHARD S. WILLIAMSON
RED CAVANEY

FROM: WILLIAM HENKEL 
SUBJECT: Presidential Trips

The past several Presidential trips have underscored the need to improve the relationship between the President and key Congressional, Local and Administration Officials who accompany the President and who are in attendance at events, or officials from the state or area we are visiting. Problems include failure to recognize or introduce key individuals at appropriate times and lack of understanding by those individuals as to what their roles and activities should be.

Furthermore, the specific goal or objective of a given trip has not always been understood between White House offices. I believe that closer coordination between this office and each of yours could vastly improve these situations. Specifically, I suggest that:

1. A representative of yours attend our trip meeting to familiarize themselves with the trip content and objectives and to identify who from our office will be acting as Trip Coordinator.
2. The names -- especially of local elected and political officials -- your office has contacted after the trip meeting so the Trip Coordinator can plan for their participation or how you want them handled.
3. Presidential guests be identified and committed as early as possible after the trip meeting and that their names be given to the Trip Coordinator along with requests or suggestions for participation.

4. Your representative maintain an on-going liaison with the Trip Coordinator who can provide draft schedules and up-dated information on the trip as it develops and refine guest participation plans. I recommend that your representative making the trip, contact the Trip Coordinator to arrange for a briefing or conference call with the Advanceman on their responsibilities to escort Presidential guests.

5. The Advance Office participate in the development of the President's briefing paper and remarks -- if only to the extent that they be reviewed by this office for factual congruency (i.e., times, locations, introductions, sequence) between those documents and the final trip schedule.

Please let me know your thoughts on this matter. I'm sure that if we coordinate these steps we can collectively produce Presidential trips that are smooth, well targeted and successful for all.

cc: Michael A. McManus, Jr.

THE WHITE HOUSE

WASHINGTON

February 4, 1983

MEMORANDUM FOR DAVID C. FISCHER

FROM: WILLIAM HENKEL *WH*

SUBJECT: 3 x 5 " Index Cards

Dave, at a meeting with the Advance Staff yesterday, we discussed that on some recent trips certain people at speech sites or in close proximity to the President were inadvertently not acknowledged, i.e., Jim Sanders, Administrator SBA, at the St. Louis lunch, members of Congress, etc.

In order to avoid this problem and if you approve, the lead advance person will try to slip you a 3 x 5" index card with the names of greeters, a separate one for those who will be on the platform with the President who we recommend be acknowledged and of any additions or changes of those who appear on the President's schedule.

Hopefully, in this way we can keep the President and you fully informed and benefit from our sense of whom needs to be recognized.

cc: M. McManus

THE WHITE HOUSE

WASHINGTON

October 27, 1982

MEMORANDUM TO THE ADVANCE STAFF

FROM: WILLIAM HENKEL

SUBJECT: Presidential Holding Areas
and Walking Routes

For the upcoming Western trip and in the future, it is imperative that holding areas and Presidential routes be as clear as possible and that any local personnel, White House staff and others be out of these areas.

At my 8:30 a.m. meeting this morning, Mr. Deaver said that in Raleigh he observed a totally unacceptable number of people in areas where they were not supposed to be. He wants the advance staff and secret service to do a better job of keeping these areas clear. In the schedule we instruct guests and staff on where they are to go, but it is the advance team's responsibility with the help of escorts to be more aggressive in channeling non-essential White House staff to viewing areas which are selected to place them out of the President's proximity.

Withdrawal/Redaction Sheet (George Bush Library)

Document No. and Type	Subject/Title of Document	Date	Restriction	Class.
02. memo	William Henkel to Advance Staff (1 pp.)	9/27/82	(b)(2)	

Collection:

Record Group: Bush Presidential Records
Office: Advance, Office of
Series: Hazelrigg, Margaret J. (Peggy)
Subseries:
WHORM Cat.:
File Location: Binder: Advance Office Operations Manual

Date Closed: 8/8/2007	OA/ID Number: 06987-007
FOIA/SYS Case #: 2007-0753-F	Appeal Case #:
Re-review Case #:	Appeal Disposition:
P-2/P-5 Review Case #:	Disposition Date:
AR Case #:	MR Case #:
AR Disposition:	MR Disposition:
AR Disposition Date:	MR Disposition Date:

RESTRICTION CODES

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

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C. Closed in accordance with restrictions contained in donor's deed of gift.

PRM. Removed as a personal record misfile.

Freedom of Information Act - [5 U.S.C. 552(b)]

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THE WHITE HOUSE

WASHINGTON

April 19, 1983

MEMORANDUM FOR: LEAD ADVANCE
PRESS ADVANCE

FROM: WILLIAM HENKEL

SUBJECT: Local News Reporting to the White House,
Speechwriters and Office Assigned Briefing
Paper

It will be your responsibility to dacom to the Advance Office and Bill Hart (News Summary) copies of newspaper articles about the President's impending trip to your location.

In addition, you will be responsible for assembling all the newspapers following the President's trip and submitting them to the Advance Office and the News Summary. If you have any questions, don't hesitate to contract Bill Hart directly on Ext. 2950. Also, the Local Media Report contained in your manual must be completed for all the local TV coverage.

All of you are responsible for developing and sending in information helpful to the office preparing the briefing paper and the speechwriter/researcher working on the President's remarks. A copy of this information should be sent to the Advance Office to my attention.

The Pittsburgh trip was a good example of being prepared for all eventualities, and I want this to be continued for each trip in the future.

Withdrawal/Redaction Sheet (George Bush Library)

Document No. and Type	Subject/Title of Document	Date	Restriction	Class.
03. memo	William Henkel to Advance Staff Re: Motorcades (1 pp.)	5/2/83	(b)(2)	

Collection:

Record Group: Bush Presidential Records
Office: Advance, Office of
Series: Hazelrigg, Margaret J. (Peggy)
Subseries:
WHORM Cat.:
File Location: Binder: Advance Office Operations Manual

Date Closed: 8/8/2007	OA/ID Number: 06987-007
FOIA/SYS Case #: 2007-0753-F	Appeal Case #:
Re-review Case #:	Appeal Disposition:
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Withdrawal/Redaction Sheet

(George Bush Library)

Document No. and Type	Subject/Title of Document	Date	Restriction	Class.
04. memo	William Henkel to Advance Staff Re: In-Town Motorcade Procedure (1 pp.)	5/3/83	(b)(2) (b)(7), (e)(f)	

Collection:

Record Group: Bush Presidential Records
Office: Advance, Office of
Series: Hazelrigg, Margaret J. (Peggy)
Subseries:
WHORM Cat.:
File Location: Binder: Advance Office Operations Manual

Date Closed: 8/8/2007	OA/ID Number: 06987-007
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May 5, 1983

MEMORANDUM FOR GREY TERRY
TRIP COORDINATORS

FROM: WILLIAM HENKEL

SUBJECT: OBSERVATIONS

Henceforth and with no exception, the following procedures must be followed:

- 1) The Assistants to the President memorandum with the Summary Schedule must be distributed for every trip.
- 2) Whenever an additional event is added to the President's schedule, which has not been discussed at the trip meeting or listed in the Assistants' memo, call the appropriate White House office and inform them of the new activity.
- 3) For every Presidential out-of-town trip, a traveling guest and staff memorandum must be distributed with baggage, transportation, dress and weather information the afternoon prior to a trip.
- 4) For multiple trips, one Trip Coordinator will be assigned overall responsibility to coordinate and integrate the various schedules.

cc: Advancemen

THE WHITE HOUSE
WASHINGTON

cc Advance
Staff Trip
info - me

May 12, 1983

OK
4/6/10

MEMORANDUM FOR WILLIAM HENKEL

FROM: W. GREY TERRY ^{BT}

SUBJECT: Deaver Meeting Re: Out of Town Speeches

ATTENDEES: M. Deaver
D. Gergen
W. Sittmann
G. Terry

The following items were agreed upon after a 10 minute discussion.

Indoor speeches should be limited from 10 to 12 minutes. Outdoor speeches should be limited from 5 to 6 minutes. Speechwriters should send researchers on pre-advances where possible although they have staffing problems of numbers of researchers.

It was further agreed that (1) Gergen should advise Darman that the Advance Office is to receive first drafts of out of town speeches and (2) that the Advance Office be provided a copy of the speechwriters draft schedule.

In addition, it was agreed that the Advance Office would hold trip meetings as soon as possible after pre-advances to provide adequate lead time to assigned speechwriters.

Finally, it was also agreed that there should be improved communication between the assigned speechwriter and the Lead Advance.

On another subject, it was requested by Gergen that the Press Office and Advance communicate on providing a room/area, etc. for interviews with the key invitees to Rose Garden events. Example: SBA Rose Garden event -- two main people were put on a bus and driven away before the press had a chance to talk with them.

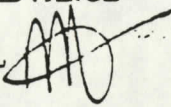
THE WHITE HOUSE

WASHINGTON

June 1, 1983

MEMORANDUM FOR PRESIDENTIAL ADVANCE

FROM:

WILLIAM HENKEL 

SUBJECT:

Thank You Letters and Photos

It is imperative that each of you make completing the thank you/contact list and ordering Presidential photos a higher priority.

I understand the difficulties of completing these tasks when you go from one stop to another. However, in the future I want you to assign a full time local volunteer to assemble thank you lists prior to your departure from a site. All thank you lists must be typed.

For volunteer Lead Advancemen, as soon as the Advance Office receives the contact sheets, they will be mailed to you along with an order form. You should return it to the Advance Office no later than 5 business days after received.

cc: A. Higgins
M. Evans

THE WHITE HOUSE

WASHINGTON

June 21, 1983

MEMORANDUM FOR ADVANCE STAFF

FROM: WILLIAM HENKEL

SUBJECT: Advance Office Volunteer Use
of WHCA Phones

Please make sure the volunteers in your staff offices know how to work the phones.

If necessary, ask WHCA to come down and give them a demonstration on the first day the office is operational.

I am TIRED of being cut off time after time and I am sure others are experiencing the same difficulty.

cc: Colonel Tuck

Withdrawal/Redaction Sheet (George Bush Library)

Document No. and Type	Subject/Title of Document	Date	Restriction	Class.
05. memo	William Henkel to Advance Staff Re: Update: Capacity of H-53's (1 pp.)	8/23/83	(b)(2)	

Collection:

Record Group: Bush Presidential Records
Office: Advance, Office of
Series: Hazelrigg, Margaret J. (Peggy)
Subseries:
WHORM Cat.:
File Location: Binder: Advance Office Operations Manual

Date Closed: 8/8/2007	OA/ID Number: 06987-007
FOIA/SYS Case #: 2007-0753-F	Appeal Case #:
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THE WHITE HOUSE

WASHINGTON

August 26, 1983

MEMORANDUM FOR ADVANCE STAFF

FROM:

WILLIAM HENKEL ~~PH~~

SUBJECT:

Insurance for Motorcade Cars

As a result of a question that came up during the President's trip to San Diego today, the following should be observed when obtaining motorcade cars.

For Official trips: When motorcade cars are either rented or donated, government "self-insurance" will cover any accidents. Accepting insurance is, therefore, not necessary (nor allowed).

For Mixed trips: When motorcade cars are either rented or donated, government "self-insurance" will cover any accidents. As above, do not accept insurance.

** If someone does have an accident, be sure to notify Room 1 ASAP so they do not split that bill off to the RNC.

For Political trips: When motorcade cars are rented, accept the insurance. If the cars are donated they MUST be insured by the dealer/owner; however, Fred Fielding's general in-house policy for political trips is to rent in ALL cases to avoid any questions concerning political contributions.

** The RNC's general insurance does NOT cover car accidents.

THE WHITE HOUSE

WASHINGTON

September 12, 1983

MEMORANDUM FOR BILL HENKEL

FROM: Larry Speakes *LS*

We need to re-emphasize to the advance staff the need to have a clear-cut understanding on all Presidential events that any "official photographer" representing the host organization have no publication rights to his photographs of the President, and that they are intended only for personal use, with any publication -- such as newsletters -- to be only with permission of the Office of the Press Secretary.

This stems from the President's visit to the National Cathedral where the Cathedral press office released photos to the New York Times and Time Magazine.

cc: David Gergen
3

THE WHITE HOUSE

WASHINGTON

October 6, 1983

MEMORANDUM FOR EDWARD V. HICKEY, JR.

FROM: WILLIAM HENKEL

SUBJECT: Open Presidential Microphones

This afternoon I was watching the video tape review on channel 2 of Presidential activities which took place during the previous week.

During the coverage of both the Americas Cup Race and the U. S. Olympic Hockey Team events while the President was greeting the participants, the podium microphone was picking up the Vice President's private conversations. These comments were picked up by the mult. Perhaps in the future we can activate the microphone when the official program begins or the President starts to speak. I would appreciate your thoughts.

Thank you.

Withdrawal/Redaction Sheet

(George Bush Library)

Document No. and Type	Subject/Title of Document	Date	Restriction	Class.
06. memo	William Henkel to Advance Staff Re: Control Car (1 pp.)	11/17/83	(b)(7), (e)(f)	

Collection:

Record Group: Bush Presidential Records
Office: Advance, Office of
Series: Hazelrigg, Margaret J. (Peggy)
Subseries:
WHORM Cat.:
File Location: Binder: Advance Office Operations Manual

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THE WHITE HOUSE
WASHINGTON

April 23, 1983

MEMORANDUM FOR WILLIAM HENKEL
SPECIAL ASSISTANT TO THE PRESIDENT AND
DIRECTOR OF PRESIDENTIAL ADVANCE

FROM: FRED F. FIELDING 
COUNSEL TO THE PRESIDENT

SUBJECT: Use of Volunteers for Presidential Advance

You have stated that you are currently recruiting individuals to perform advance services on behalf of the President. As you will be investing significant resources into preparing such individuals to be advancement throughout the rest of the President's term of office, the question has arisen with regard to the restrictions that will apply to the payment of the salaries of these volunteer advancement by their employers in the event that the President becomes a candidate for re-election. Accordingly, you have requested legal guidance regarding any prohibitions under the Federal election laws which would affect any volunteers (employed by corporations, partnerships or sole proprietorships) rendering advance services to the President if and when he becomes a candidate for re-election.

All personal services, when voluntarily donated to a Federal candidate or a political committee without compensation, are exempted from the definition of a contribution. FEC AO 1980-88, 1 FED. ELECTION CAMP. FIN. GUIDE (CCH) ¶ 5545. Additionally, no contribution occurs when employees (of any entity) paid on an hourly or salaried basis and expected to work a particular number of hours per pay period, perform political activities during working hours, provided that the lost time on company work is made up by the employee within a reasonable time. 11 C.F.R. § 100.7(a)(3)(i). (The FEC has not specifically addressed the question of what constitutes a "reasonable time" for making up such work hours.) Similarly, no contribution results where the time used by an employee to engage in political activity is bona fide, although compensable, vacation time or other earned leave time. 11 C.F.R. § 100.7(a)(3)(iii).

Under the Federal Election Campaign Act of 1971, as amended, 2 U.S.C. §§ 431 et seq., a corporation is prohibited from making a "contribution or expenditure in connection with" a Federal election. 2 U.S.C. § 441b. A corporate employee may provide volunteer services to a Federal candidate or political

committee under the guidelines noted above for employees paid on an hourly or salaried basis; may (as noted above) use his bona fide vacation or earned leave time in which to volunteer services to a Federal candidate or political committee; or may go on leave without pay while volunteering services to a Federal candidate or political committee. If the employee goes on leave without pay, the corporation may not pay the employee's share of fringe benefits (life insurance, retirement, or health insurance) for the period during which the employee is on leave without pay. The separate segregated fund (PAC) of such corporation may pay the employers share, however, and such payment would be a permissible in-kind contribution to the candidate (provided that the amount paid did not exceed applicable contribution limitations). If the employee wishes to pay for such contributions, however, this would not be an in-kind contribution to the candidate or political committee. 11 C.F.R. § 114.12(c)(1). Service credit for leave without pay is permissible if it is customary practice for all employees on leave without pay. 11 C.F.R. § 114.12(c)(2).

On several occasions the FEC has specifically addressed the question of "volunteer" political activities performed by partners or associates in law firms. 1/ In each instance, the Commission has focused on whether the individual's compensation from the law firm was based on the hours spent in performing work for the firm or its clients; or was based on a proprietary interest in the firm and other factors, such as whether the individual in question had discretion in the use of his work time. Copies of these Advisory Opinions should be reviewed carefully by any advance volunteers who are members of law firms or other partnerships. (See William Henkel).

As for those volunteer advancemen who are owners of sole proprietorships, if such companies are unincorporated, the individual involved need not be concerned about the prohibitions applicable to corporations (2 U.S.C. § 441b) and would be subject to the guidelines noted above by FEC Advisory Opinion 1980-88, i.e., all personal services, when voluntarily donated to a Federal candidate or a political committee without compensation, are exempted from the definition of a contribution. Hence, owners of sole proprietorships may provide volunteer services to a Federal candidate or political committee without limit and without triggering any reporting or recordkeeping requirements under the Federal Election Campaign Act.

1/ FEC AO 1979-22, 1 FED. ELECTION CAMP. FIN. GUIDE (CCH) § 5409; FEC AO 1979-58, id., § 5465; FEC AO 1980-107, id., § 5555.

THE WHITE HOUSE
WASHINGTON

October 8, 1982

CC: Gray T.
CC Advance Staff
IG only

MEMORANDUM FOR JAMES A. BAKER III
MICHAEL K. DEEVER
EDWARD J. ROLLINS
MICHAEL A. McMANUS
JOHN F.W. ROGERS
FRED BUSH

FROM: FRED F. FIELDING
COUNSEL TO THE PRESIDENT

SUBJECT: Guidelines for Travel by the President
and Vice President

This memorandum responds to your request for advice with respect to the payment of expenses associated with travel by the President and Vice President. Travel by the President or Vice President may often include both official events, undertaken as part of the President's or Vice President's official roles as governmental leaders, and purely political events, undertaken for partisan purposes in order to advance the interests of the President's and Vice President's political party. This mixed character of much Presidential and Vice Presidential travel follows naturally from their dual roles as governmental officials and leaders of their party. You have asked us to articulate the legal principles governing the allocation and payment of costs associated with such travel.

General Legal Principles

Prior to the general election campaign period, applicable law and regulations do not provide a specific method for allocating the costs of mixed official and political travel by individuals other than candidates. ^{1/} Neither is there a precise definition for distinguishing between "official"

^{1/} Where an individual, other than a candidate, conducts campaign-related activities on a trip, the portion of the trip attributed to each candidate shall be allocated on a reasonable basis (11 C.F.R. § 106.3(c)(1)). Additionally, 11 C.F.R. § 9004.7 provides a set of rules concerning the allocation of travel expenses for a Presidential or Vice Presidential campaign -- i.e., different guidelines will apply to political travel by the President, Vice President and senior Administration officials during the Presidential election campaign period.

and "political" functions. As a result, guidelines during this period are based on general legal principles, to some degree on policies established over a period of years by several Administrations, and on guidance from Federal Election Commission opinions and actions.

When considering payment of expenses associated with Presidential and Vice Presidential travel, two major principles governing the use of appropriated funds must be borne in mind. First, appropriated funds may be spent only for the purposes for which they have been appropriated (31 U.S.C. § 628; 52 Comp. Gen. 504 (1972); 50 Comp. Gen. 534 (1971)). Thus, funds appropriated for the official functioning of the offices of the President and the Vice President may be used for travel expenses only if the travel is reasonably related to an official purpose. If, however, there is no reasonable connection between the expense incurred and the official purposes to be served by an appropriation -- as, generally speaking, there would not be when an expense is incurred purely for partisan political purposes -- official funds may not be used to pay the expense.

The second basic principle is that, in general, official activities should be paid for only from funds appropriated for such purposes, unless Congress has authorized the support of such activities by other means. Stated another way, although appropriated funds should not be used for non-official purposes, it is equally true that outside sources of funds may not be used to pay for official activities. This latter principle, which prevents the unauthorized augmentation of appropriations, has been recognized by the Comptroller General on numerous occasions. 2/

"Political" and "Official" Travel -- Defined

The cost of travel in conjunction with wholly official activity must be paid from appropriated funds and expenses for travel in conjunction with wholly political activity will be paid from sources other than appropriated funds. In those instances where the same travel costs are incurred in conjunction with official and political activity, there should be a proration of expenses.

It is important at the outset to attempt to identify what is meant by "political" -- as opposed to official -- activities of the President and Vice President. It will be necessary

2/ See, e.g., 9 Comp. Dec. 174 (1902); 17 Comp. Dec. 712 (1911); 23 Comp. Gen. 694 (1944); 46 Comp. Gen. 689 (1967).

to determine on a case-by-case basis whether an expense is official or political in character. There is unfortunately no single litmus test for making such judgments. Indeed many events could be characterized properly as either political or official or both. Therefore, in making this determination the persons most familiar with the facts of a particular trip will have to assess all of the circumstances involved and apply a large measure of common-sense. There are, however, two major variables concerning the source of the expense to be borne in mind: the nature of the event involved, and the nature of the individual involved. Either, or both, of these indicia may be useful in a particular case in determining whether a particular expense should be considered official or political.

With respect to the nature of the event giving rise to an expense, as a general rule, Presidential and Vice Presidential travel should be considered "political" if its primary purpose involves their positions as leaders of their political party.

Appearing at party functions, fundraising, and campaigning for specific candidates are the principal examples of travel which should be considered political. ^{3/} On the other hand, travel for inspections, meetings, non-partisan addresses, and the like ordinarily should not be considered "political" travel, even though it may have partisan consequences, or concern questions on which opinion is politically divided. The President cannot perform his official duties effectively without the understanding, confidence, and support of the public.

^{3/} Expenses paid by the Republican National Committee ("RNC") for travel by any individual in support of specific identifiable federal candidates are an in-kind contribution to, or coordinated expenditure for, the candidates and would apply against the RNC's contribution and expenditure limits for those federal candidates. If a trip or a portion thereof is on behalf of a specific identifiable federal candidate, the estimated share of such expenses which are reasonably allocable to a particular campaign must be paid by check or similar draft and in advance by the appropriate campaign committee in order that appropriated funds not be used for political purposes and that the RNC not inadvertently violate contribution or expenditure limitations for individual candidates. Because of these restrictions, the RNC cannot and will not assume financial responsibility for political trips of which it has not had advance notice, an opportunity to coordinate and to organize appropriate expense payments. Political or mixed official/political travel which contains even a single candidate-related event must be closely coordinated with the RNC well in advance of the scheduled trip.

Travel and appearances by the President and Vice President to present, explain, and secure public support for the Administration's measures are an inherent part of the President's and Vice President's official duties.

Thus, the President and Vice President have the right and obligation to explain the Administration's positions to the public. Activity which is designated to secure information, confer, give direction, present information, or explain and secure public support for Administration policies should be considered "official." However, an "official" speech may become "political" depending on the circumstances. A substantially partisan political speech at an event which might otherwise be considered "official," such as addressing the U.S. Chamber of Commerce, may necessitate applicable expenses to be paid from sources other than appropriated funds. In determining whether activity is official or political, all relevant factors should be considered, including, but not limited to, the identity of the sponsor of the event, the group or organization being addressed, other participants, whether the speech being delivered is partisan and political in nature, or whether it is a factual presentation or defense of the Administration's positions on the issues.

If the President and Vice President are involved in activity in their roles as leaders of their political party or as candidates, e.g., appearances at party events or functions, or campaigning for specific candidates or addressing what otherwise might be defined as an "official" event but in a substantially partisan political manner, that activity will be considered political.

There clearly is much room for discretion in determining whether an event giving rise to an expense is political or official. At bottom, the question is a factual one that can only be answered by those most familiar with the particular facts of a given situation. Nonetheless, in general, if the purpose of an event or a trip is to promote the partisan aims of the President's or Vice President's party or candidates of that party, then expenses incurred in performing the event would generally be political in character. Should particular questions arise about specific events, Counsel's Office would be glad to provide more concrete advice concerning them.

An additional variable that may, in some circumstances, determine the character of a particular expense incurred on a trip is the nature of the individual whose activity generates the expense. There are some individuals who, in particular situations, are on a trip for inherently official or political purposes. Expenses incurred by them should

generally be viewed as either official or political depending on their particular role. For instance, there are some persons whose official duties require them to be with the President, whether or not the President himself is on official business. This group includes, but is not necessarily limited to, the President's doctor, his Military Aide and the Secret Service agents responsible for his protection. 4/ A similar group would exist for the Vice President. Expenses incurred during travel with the President or Vice President by this group of individuals should be considered official regardless of the character of the event that may be involved in a given trip.

Similarly, on an otherwise entirely official trip, an individual may accompany the group for purely political reasons. As a rule, any expenses specifically incurred by such individuals should be considered political expenses, regardless of the events involved in the trip.

In short, there is no single test for determining whether an expense is political or official in character. Viewed generally, expenses of individuals whose official duties require them to travel with the President or Vice President should normally be considered official. Expenses associated with individuals who are not necessarily serving in either a wholly official or wholly political capacity -- such as the President or Vice President or other individuals in the White House who may, consistent with their official duties, perform political functions -- should normally be judged to be official or political depending on the character of the event giving rise to the expense.

Allocation of Expenses

In our view, an approach which attempts in good faith to apportion the costs of a trip on the basis of a reasonable division between the time spent on political activities and the time spent on official activities is a reasonable and legal resolution of the underlying problems. For example, if 50 percent of a single day's events are political and 50 percent are official, approximately 50 percent of the costs associated with participants whose roles are not necessarily either entirely official or entirely political should be reimbursed by the political committee and 50

4/ This list is not intended to be exhaustive. The President may, in his discretion, determine that others are necessary members of his official party whenever he travels.

percent should be paid from appropriated funds, unless such an apportionment, under the particular circumstances, would on some basis be unreasonable or inequitable.

It should always be remembered that allocation of expenses would be appropriate only with respect to expenses associated with individuals whose official roles permit them to perform political functions, and only when those individuals are on a trip that itself is not entirely political or wholly official in nature.

Thus, when there is a mixed trip involving the President or Vice President, the purpose of which is both substantially political and substantially official, expenses should be paid in the following manner: first, expenses for individuals who are necessarily official (Secret Service, Military Aides, etc.) should be paid for with appropriated funds; second, expenses for individuals who are necessarily political (e.g., campaign officials) should be reimbursed by a political committee; third, incremental expenses specifically attributable to an official event should be paid from appropriated funds, and incremental expenses specifically attributable to a political event should be paid from political funds; and finally, expenses for individuals whose official roles permit them to perform political activity should be reasonably and equitably apportioned so that a share reflecting the amount of a trip that is political in character should be paid by a political committee. If these general guidelines are followed, then the requirements of using appropriated funds for official purposes but not using such funds for political purposes will be achieved.

What has become known as a "hard-time" formula may be used to allocate "mixed" trips, i.e., trips which combine official and political activity. There are situations, however, where a different method to allocate costs would be "reasonable" as well. 5/

The government shall be reimbursed the equivalent commercial airfare, plus the cost of in-flight services, for each person who travels on a government aircraft in a purely political capacity. In the instance of a mixed trip, the amount of the reimbursement for use of government aircraft, will be prorated as indicated by the nature of the activity.

5/ Applicable law and regulations require "candidate" travel in both the primary and general election campaigns to be allocated on a "hypothetical trip" basis. (See 11 C.F.R. § 106.3.)

14 passengers x \$600 x 78.3% = \$6,577.20 total reimbursement to government for use of aircraft plus reimbursement from media

If the President had spent 21 hours in political activity and only 45 minutes in official activity, the entire trip may be treated as political. The 45 minutes of official activity may be treated as de minimis.

The four-step approach set forth above may be summarized as follows: first, expenses for individuals who are necessarily official should be paid with appropriated funds; second, expenses for individuals who are necessarily political should be reimbursed by a political committee; third, incremental expenses specifically attributable to an official event should be paid from appropriated funds, and incremental expenses specifically attributable to a political event should be paid from political funds; and fourth, expenses for individuals whose official roles permit them to perform political activity should be allocated between political and official funds in accordance with the "hard-time" formula. 6/

Local expenses such as hotel, ground transportation, meals, etc., for the party traveling with the President or Vice President on mixed trips, as well as advance expenses, will be prorated on a basis similar to that of travel on government aircraft. However, the circumstances surrounding each trip will be considered in making the proration. Example: If the traveling party would have returned to the point of departure on a given day but for the fact that there was a political activity the next day, lodging costs shall be assessed solely to the political sponsor.

6/ These procedures are not designed to negate a common sense division of expenses when individual bills cannot otherwise be reasonably and efficiently allocated under this hard-event time formula. Example: On a mixed trip, various staff members incur a bill for meals totaling \$15.00. In the case of such a small bill, it would clearly be administratively unreasonable to divide the total by political and official categories. Consequently, the White House may, in certain circumstances, bill those expenses without individual bill allocation provided there is documentation detailing how the bill was charged and why no allocation could reasonably be made in the circumstance. In any event, the sum total of expenses incurred on any given trip must be allocated and paid according to the appropriate percentage of the trip attributable to either official or political hard time.

Expenses that are associated specifically with a political activity and not with any official activity shall be treated as political, and expenses associated specifically with an official activity and not with any political activity shall be treated as official. For such expenses, there shall be no allocation between official and political funds. Example: If a sound system is rented for a political activity in a locale where there was also an official activity that did not require a sound system, the cost of the sound system would not be prorated. Of course, if cars are rented in a locale where there are only political activities, no part of the costs should be charged as official.

Frequently, advance persons travel to only one city on a given trip. In such cases, it would be inappropriate to prorate their expenses on the basis of the entire trip taken by the President or Vice President. In such instances, the official versus political time spent by the President and Vice President in that particular city will be calculated and the advance person's expenses prorated accordingly. You should note that allocation of expenses associated with advance work between political and official funds is appropriate only when the individuals incurring the expenses are not covered by the Hatch Act's restrictions on the performance of political activity. If a person is covered by the Hatch Act, he or she generally cannot perform the types of political activity that would be paid for by a political committee.

In the case of a pre-advance in which a person or persons travel through the entire trip for an initial assessment, the total costs of that pre-advance trip would be prorated on the same basis as the actual trip. In allocating the costs of travel other than air travel, the allocation formula should be applied to any government maximum for that type of expenditure.

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. Reimbursement for political and media passengers on Presidential or Vice Presidential government aircraft will be paid to the Treasury by entities which have funds that may properly be used for such travel.

Hatch Act Restrictions

In determining whether a federal employee may or may not perform activities during a trip or during advance work for a trip, the first question to ask is whether the activity is official or political. 7/ If it is official, then it is necessary to ask whether the activity is within the scope of the employee's official duties. If so, then the employee may perform the activity and be paid from appropriated funds. We note that there is a group of persons whose activities are always official regardless of the type of trip involved (i.e., the Secret Service). On the other hand, if an activity to be performed on a trip or during advance work is political in nature, then it is necessary to ask whether the employee is authorized to perform such activity. A federal employee covered by the Hatch Act is in general prohibited from engaging in political activity. See 5 U.S.C. § 7324. It follows from this that an employee covered by the Hatch Act must perform official activities that are part of the employee's official responsibilities. In such a case, the employee's expenses cannot be paid for with political funds, for official activity must be paid for with appropriated funds.

Any employee of the federal government not covered by the Hatch Act may participate fully in all aspects of the planning and execution of any political travel by the President and Vice President. However, such employee must fulfill his or her obligation of performing 40 hours of work per week on official business. Such employees are entitled to use time beyond 40 hours per week as well as earned vacation time for such political purposes.

To the extent that employees of the federal government travel with or in advance of the President or Vice President on trips that may be political or mixed, those individuals who are paid at a rate equivalent to or in excess of the rate of pay for Executive Level V are on duty at all times and, provided that they do in fact fulfill their obligation to the government on a regular basis, no special provision need be made for the time which they spend involved in political activity on an "irregular" basis. For those whose rate of pay is less than that of Executive Level V, records shall be maintained for the purpose of showing that the time spent in such travel is in excess of their obligation to the government.

7/ This inquiry is governed by the tests set forth earlier in the guidelines for determining when a trip or activity is political or official.

Any employee of the government may provide to the President and Vice President those services which are essential to their official functions whether the trip is official or political. Those services would ordinarily include full provision for the comfort and safety of the party: communi- cations; clerical, logistical and administrative support; assistance in the management of paperwork and records of decisions.

Persons whose presence with the President or Vice President is necessary to the conduct of their official responsibilities (regardless of the kind of activity in which the President or Vice President is engaged) and those persons who perform only duties which are within the ordinary scope of their official responsibilities as government employees, e.g., Secret Service, may always be treated as official business.

White House staff members are exempt from the provision of the Hatch Act prohibiting federal employees from taking an active part in political management or in political campaigns; and thus, may engage in partisan political activity. All persons detailed to the White House from other agencies remain subject to all provisions of the Hatch Act.

Persons employed by certain other agencies in the Executive Office of the President, such as the Office of Management and Budget and the Office of Policy Development, are also "hatched" and may not take an active part in partisan campaign activity. Consultants, experts and others employed on an intermittent basis by these agencies are "hatched" on days on which they receive compensation from these agencies.

All other government employees, including Schedule "C" employees, are covered by the prohibition against political activity except for those individuals who are appointed by the President with the advice and consent of the Senate.

"Hatched" employees may participate in the political process in limited ways. They are permitted to: register and vote; make a financial contribution to a party or candidate; express their opinion on political subjects; wear campaign buttons or display bumper stickers; be a member of a political party or organization; attend (but not as a delegate) a political convention; attend a fundraiser or campaign event; and sign a nominating petition.

Employees covered by the Hatch Act's prohibition of political activity may not: take an active part in the management of a political campaign; be a partisan candidate; serve as an officer of a political organization or campaign; organize a political organization or club; solicit, receive, handle or disburse political contributions; sell tickets to, organize or actively participate in any fundraising activity; solicit votes for or against a candidate; serve as a party or candidate challenger or pollwatcher; drive voters to the polls for a candidate or party; endorse or oppose a candidate in a political advertisement, broadcast, or campaign literature; serve as a delegate or alternate to a political convention; organize or actively participate in the activities of a political convention; serve on a standing committee of a political convention; or circulate a candidate-nominating petition.

As stated earlier, you should be aware that different guidelines will apply to political travel by the President, Vice President and senior Administration officials during the Presidential election campaign period. Additionally, attached for your review are guidelines which set forth in summary fashion the basic legal and policy considerations applicable to travel by the President and Vice President.

Attachment

cc: Paul A. Russo
William Sadleir
✓ William Henkel

SUMMARY GUIDELINES

General Legal Principles

1. Appropriated funds and government resources should not be used for partisan political purposes.
2. The cost of political travel may not be paid from appropriated funds nor may government credit be used for this purpose.
3. Transportation and related travel expenses on a wholly political trip must be paid by the sponsoring political group or campaign committee.
4. Transportation and related travel expenses on a "mixed" trip -- i.e., one that contains both official and political events -- should be reasonably allocated between the government and the sponsoring political group or campaign committee.
5. Only those Administration officials who are not "hatched" may actively engage in partisan political or campaign activity. Outside of the White House, only Presidential appointees subject to Senate confirmation are not "hatched."

Political Travel

1. Unless traveling with the President or Vice President, Government aircraft shall not be used on wholly political trips.
2. All transportation and related travel expenses must be paid by the political sponsor or campaign committee.
3. Expenses paid by the Republican National Committee ("RNC") for travel by any individual in support of specific identifiable federal candidates are in-kind contributions to, or coordinated expenditures for, the candidates and would apply against the RNC's contribution and expenditure limitations for those federal candidates. If a trip or a portion thereof is on behalf of a specific identifiable federal candidate, the estimated share of such expenses which are reasonably allocable to a particular campaign must be paid by check or similar draft and in advance by the appropriate campaign committee in order that appropriated funds not be used for

Political Travel (cont:)

political purposes and that the RNC not inadvertently violate contribution or expenditure limitations for individual candidates. Because of these restrictions, the RNC cannot and will not assume financial responsibility for political trips of which it has not had advance notice, an opportunity to coordinate and to organize appropriate expense payments. Political or mixed official/political travel which contains even a single candidate-related event must be closely coordinated with the RNC well in advance of the scheduled trip.

4. Hatched employees may handle the logistics of the President or Vice President's participation in political and campaign-related events; however, they should not do anything to assist in organizing or setting up the political event.

Mixed Official/Political Travel

1. All costs of mixed travel (transportation, lodging, meals, etc.) must be allocated between the government and the political sponsor or campaign committee. Close questions should be decided on the side of charging the political entity more and the government less.
2. In an instance where a traveler sets out on an official trip, wholly paid for by the government, and during the trip adds events that are political or campaign-related, appropriate reimbursement must be made to the government at the earliest possible time on the basis of the changed circumstances or mistake.
3. Prior to the Presidential campaign period, applicable law and regulations do not provide a specific method for allocating the costs of mixed official/political travel by individuals other than candidates. Neither is there a precise definition for distinguishing between official and political functions. As a result, an allocation system has been devised based on general legal principles, to some degree on policies established over a period of years by several Administrations, and guidance from Federal Election Commission opinions and actions. It consists

Mixed Official/Political Travel (cont.)

of a "hard-time" formula and may be used to allocate "mixed" trips, i.e., trips which combine official and political activity. */

5. Government or Agency personnel who are "hatched" may advance the official events on a mixed trip, but must not do anything to assist in organizing or setting up political or campaign-related events on a mixed trip. However, they may be fully involved in arrangements for the official events on the trip. Individuals who are "hatched" may handle the logistics, including security and communication functions of the President's participation in political events, provided such is within the scope of their official responsibilities.
6. All expenses of a "hatched" person properly accompanying a traveler engaged in mixed travel must be paid by the government since the "hatched" person is engaging only in official duty.
7. If the principal traveler on a mixed trip is accompanied by a non-hatched Department or Agency person, that person's travel expenses must be allocated on the same basis as the principal.

*/ Applicable law and regulations require "candidate" travel in both the primary and the general election campaigns to be allocated on a "hypothetical trip" basis. See 11 C.F.R. § 106.3. Additionally, 11 C.F.R. § 9004.7 provides a set of rules concerning the allocation of travel expenses for a Presidential or Vice Presidential campaign -- i.e., different guidelines will apply during a Presidential election campaign period.