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Presidential Transition of Ronald Reagan

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REPORT ON THE TRANSITION OF FORMER PRESIDENT RONALD REAGAN

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OFFICE OF RONALD REAGAN

INTRODUCTION

Ronald Reagan is the first man since Dwight D. Eisenhower, 28 years ago, to have successfully completed his two full terms as President of the United States.

Aides to the interm five presidents never had, for various reasons ranging from assassination to resignation to re-election bids, the opportunity to fully and completely chart a course for the future of that departing president, while he was still in office.

Because of the 22nd Amendment to the Constitution, it was clear that President Reagan would be leaving the White House in January of 1989 at the conclusion of his second term. Ronald Reagan's White House staff was able to put forethought and meticulous planning into the smooth and dignified transition of the President and Mrs. Reagan back into private life.

In order that future planners of outgoing Presidential transitions might have benefit of our insights, our methods of planning, our contacts with other government agencies and private entities, and our recommendations; we have compiled the following report on the Transition of Ronald Reagan.

ACKNOWLEDGMENTS

Frederick J. Ryan, Jr., Chief of Staff to former President Ronald Reagan, and the Transition Office of Ronald Reagan wish to thank the following individuals for their service and personal contributions to the transition planning of the 40th President of the United States.

Each of these individuals' unique talents and special knowledge have helped to make this transition a milestone for future presidential transition planners. We truly appreciate all of their contributions and recommendations which are included in this final report.

Robert Barrett
Anita Bevacqua
Ross Biatek
Steve Blitz
Patricia Bryan
Sally Campbell
Jeanine Chase
Ashley Cooper
Jack Courtemanche
C. Christopher Cox
A.B. Culvahouse
Carol Facey
Frank Fahrenkopf
John Fawcett
Raymond Fontaine
Sig Girgus
Terry Good
Ted Graber
Larry Harlow
David Haun
Clarence "Biff" Henley
Robert Higdon
John Hilbolt

Adam Isles
Selina Jackson
Jean Lamb
Ann Marie Lynch
Matt McGuire
James McKinney
Garrick Newman
Maria Tess Ortiz
Kathy Osborne
William Parr
Elizabeth Penniman
Rex Scouten
Martha Kimberly Sandie
Harry Saunders
John Simpson
William French Smith
Suzie Talaat
John Taylor
Edwin Thomas
Gary Walters
Lew Wasserman
Claudine Weiher
Mary Jane Wick

OFFICE OF RONALD REAGAN

REPORT BY FREDERICK J. RYAN, JR.
Chief of Staff, Office of Ronald Reagan and
Director of Transition for President Ronald Reagan

As long as the 22nd Amendment to the Constitution remains in place, a president who successfully earns a second term in office will realize that his days are numbered until the January 20th when he returns to private life.

President Ronald Reagan realized this, and with nearly two years remaining in his second term, he asked me to begin looking into the steps that could be taken to plan for his return to private life and the smooth transition of his successor into the White House. We began this process at this early point to insure that President Reagan could continue to direct his full efforts at governing our nation and not be distracted by the sudden demands of personal planning in his final months in office.

In this transition planning process, I immediately learned that there was no "How to..." manual for outgoing presidential transitions. Since no president had voluntarily left the White House in nearly thirty years, there were no opportunities for outgoing presidents and their staffs to begin early planning of their transitions. At best, they had the ninety-day period between Election Day and Inaugural Day. And during that period, the sudden surprise of election results, coupled with the slowdown of Thanksgiving and Christmas holidays, did not even allow a full three months of outgoing transition activity.

My first step was to contact the government agencies involved in the transition of outgoing presidents. I sought to learn the rules and regulations involved in a transition as well as using the benefit of the experience from career government servants who had been involved in other transitions. I found the benefit of their institutional knowledge to be extremely helpful. Many of those career government employees have assisted in this report with their recommendations in the sections that follow.

So as not to be redundant about the timetables and specific functions performed by these entities, I will concentrate here on my perspective as the central coordinator of all activities. My objectives as Transition planner were:

1. To become thoroughly familiar with and insure that Congressional funding through the Presidential Transition Act and the Former Presidents Act would provide proper funds for office space and equipment and staff salaries. Where these funds were not sufficient, we would have to go to private sources for supplementary funding.

2. To establish the Office of Ronald Reagan in Los Angeles, California. This included selecting the office site, coordinating the design and buildout, negotiating the lease, identifying office staff and providing for their salaries and benefits.
3. Serve as point of contact for the following federal agencies, White House Offices, and private sector organizations involved in various aspects of Transition planning and execution.
 - a. *Office of Management and Budget.* Responsible for the monitoring of Congressional legislation regarding the Presidential Transition Act and the Former Presidents Act.
 - b. *White House Office of Legislative Affairs.* Responsible for protecting the Administration's interests in the two Congressional Acts affecting President Reagan as a former President.
 - c. *General Services Administration.* Administrator of all government monies to the Transition and the Office of the former President.
 - d. *National Archives and Records Administration.* Keeper of all historical Presidential records and gifts. Responsible for the archiving and shipping of all Presidential papers and gifts to California sites for later inclusion in the Reagan Presidential Library in Ventura County, California.
 - e. *White House Office of Records Management.* White House liaison with National Archives to insure the safe and proper movement of Presidential papers from all White House offices to storage in California.
 - f. *White House Office of Chief of Staff.* Consultant on all activities and goals of the Transition office, including theme planning for the President's last year in office.
 - g. *White House Office of the First Lady.* Consultant on all activities and goals of the Transition Office involving the First Lady.
 - h. *White House Office of Legal Counsel.* Consultant on funding, ethics and other legal matters.
 - i. *White House Military Office.* Liaison with Defense Department in providing transportation of goods and papers to California.
 - j. *White House Communications Agency.* A branch of the White House Military Office with the task of providing communications support for the former President.

- k. *United States Secret Service.* Responsible for the security of the former President and First Lady, their residence, transportation, and office space.
- l. *White House Office of Administration.* Cooperation from the Administrative Office was imperative in providing Transition office space, telephones, personnel action, travel allowances, former President's staff personnel action, and assistance in the flow of decision memoranda to and from the President.
- m. *White House Ushers Office and Curator's Office.* Responsible for the oversight of shipment of all personal goods for the Reagans.
- n. *Ronald Reagan Presidential Library Foundation.* Most of the White House gifts and official papers would eventually go to the Presidential Library. We decided to involve the Library Foundation early in the process to insure the proper handling of the gifts and papers.
- o. *Republican National Committee.* A source of additional funding for transition costs not covered under the Presidential Transition Act or the Former Presidents Act.
- p. *Gibson, Dunn & Crutcher.* In addition to White House Counsel and other government attorneys, the President's private lawyers were also asked to review procedures.
- q. *Architects, engineers, contractors, designers and attorneys.* Involved in the design and construction of office space for the former President.
- r. *Transition Team for President elect Bush.* Important in providing open communication on the activities of the former President to staff of newly-elected president.
- s. *Office of Former President Reagan staff.* Of the 15 staff members of the Office of former President Reagan, 14 came from existing White House staff. It was essential to arrive in California with a staff who knew the routines by which President Reagan worked, his values and goals. By having these staff members committed well in advance of January of 1989, we were able to make decisions, with their advice, on office equipment, stationery, staff transportation, living arrangements, etc.

RECOMMENDATIONS

While future transition teams may not have benefit of the following, I believe that these were most influential in the ease and swiftness of decision making and action in this outgoing Presidential Transition.

1. The president should designate someone to head his transition no later than one year prior to the end of his term. I recommend that even a president seeking reelection to a second term appoint a transition planner. If his reelection is successful, the transition planner would be able to resume his work in the second term. Otherwise, in the event of an election defeat, the outgoing president could already have a home, office and staff to assist in their dignified return to private life.
2. The transition planner should have direct access to the President and the First Lady during Transition planning.
3. The transition planner should be someone who will stay on with the former President in some capacity. This will ensure proper motivation in Transition planning and continuity into the former president's office.

OFFICE OF RONALD REAGAN

THE PRESIDENTIAL TRANSITION OFFICE

REPORT PREPARED BY:

**JEANINE CHASE
ANN MARIE LYNCH
SUZIE TALAAT**

During the months leading up to the actual moment when the President will leave office, countless details must be dealt with which require cooperation not only among offices in the White House but also with the General Services Administration, the Office of Management & Budget and the National Archives. For this reason, the Presidential Transition Office was established, with offices in the Old Executive Office Building, to coordinate all the activities of the Transition and to serve as a focal point for all involved to look to for guidance. This office, which consisted of four full-time staff members, was under the direction of Frederick J. Ryan, Jr., Director of the Reagan Transition and Chief of Staff for President Reagan once he left office.

In addition to coordinating with other offices involved in the Reagan Transition, the Presidential Transition Office worked on the following:

I. The Reagan Documentary

In November 1987, Elizabeth Penniman began the research and development of a documentary on the Reagan Presidency. The Transition staff selected Phil Dusenberry, Chairman and Chief Executive Officer of BBDO New York and Norman Cohen of the Normandy Group to co-produce a documentary film entitled "The Reagan Years: A Retrospective." As the leader of the Tuesday Team which produced the Reagan-Bush video for the 1984 Republican Convention, Phil Dusenberry was familiar with the process of producing a Presidential documentary.

Prior to production, the Transition staff obtained legal guidelines from the White House Legal Counsel's Office. Working within those guidelines, the staff selected film footage and photographs depicting events throughout the Administration from the White House Television Office and Photo Office respectively. In addition, the rights to photographs by independent photographers were purchased for inclusion in the video. Several interviews with President Reagan and materials prepared by the White House Speechwriters Office were utilized by the production company for the script of the audio portion of the documentary. These clips were then integrated with the selected segments from the 1984 video to create the final product and the documentary was completed in August 1988.

Funding for the documentary was provided by the Republican National Committee, the National Republican Congressional Committee, and the National Republican Senatorial

Committee in exchange for rights to air the video during the 1988 President's Dinner and the 1988 Republican National Convention (however this did not allow them to rebroadcast or duplicate the film). Following the convention, all film rights to the documentary were purchased by the Ronald Reagan Presidential Foundation for use in President Reagan's Library.

II. The Disposition and Transportation of Presidential Papers

Plans for the collection and transportation of Presidential papers began in September 1987 and were outlined in a memo by the Director of Records Management, Biff Henley. The memo specified that an appropriate storage site for the Presidential papers must be identified by an archivist from National Archives on detail to Records Management to project the amount of total storage space required at the end of the Administration. In December 1988, the papers collected from the White House Offices were boxed and inventoried.

This included the personal papers received from Cabinet members, both past and present, of the Reagan Administration, which were received following a letter from President Reagan requesting original and/or copies of their personal papers for inclusion in the Ronald Reagan Presidential Library.

The transportation of the Presidential papers to California was coordinated with the assistance of the White House Military Office, the National Archives and the Department of Defense. The detailed operation was described in a memo (following) by Claudine J. Weiher, Deputy Archivist of the United States and David O. Cooke, Director of Administration and Management for the Office of the Secretary of Defense. This operation required three shipments via military aircraft: the first in November 1988; the second in January 1989; and the last in July 1989 at the conclusion of the Transition period.

In addition to the following memo from Claudine Weiher and the letter from David O. Cooke to Mr. James C. McKinney regarding the transportation of the Presidential papers, see the detailed report of John Fawcett, Assistant Archivist for Presidential Libraries, National Archives and Records Administration, under Tab G in this manual.

**OFFICE OF THE SECRETARY OF DEFENSE
WASHINGTON, DC 20301**

October 19, 1988

Mr. James C. McKinney
Director
White House Military Office
The White House
Washington, D. C 20500

Dear Jim:

You recently wrote to Colonel George Cole concerning the movement of the President's papers to California. In that letter you asked for the DOD position on the method of shipment by October 19, 1988.

Claudine Weiher, the Deputy Archivist, and I met on Monday, October 17, 1988 to review all concerns associated with the movement of the Reagan Presidential Records. We are convinced, based upon all considerations, that these records should be moved by military aircraft and we are prepared to execute this movement on the dates that you consider appropriate.

Attached is our movement plan providing additional details and setting forth the responsibilities of the Department of Defense and the National Archives

Sincerely,

Claudine J. Weiher
Deputy Archivist
of the United States

David O. Cooke
Director of Administration
and Management

cc:Frederick J. Ryan, Jr.

CONCEPT OF OPERATIONS

1. The movement of the official papers of President Reagan from the National Capital Region (NCR) to National Archives Records Administration (NARA) designated storage facilities will be performed in two three phased moves. The first move is anticipated to occur 5-10 November 1988; the second move is anticipated 9-27 January 1989.
2. Phase I - Loading and movement from NCR to Andrews Air Force Base. Commercial tractor trailers contracted by the U.S. Army Military Traffic Management Command (MTMC) will arrive at designated NARA facilities in the NCR for loading of the Presidential papers. The NARA will arrange and coordinate all physical security outside of military installations/control. Trailers, inventoried and sealed by NARA, will move to Andrews, Maryland. Air Force security will assume custody at the gate and provide appropriate security for the trailers until execution of Phase II.
3. Phase II - The Military Airlift Command (MAC) will accept the chain of custody from NARA upon acceptance of the air cargo. Classified cargo will remain the responsibility of designated NARA couriers. Presidential papers will be configured for air movement by MAC. Air movement will be provided by MAC assets from Andrews AFB, to Marine Corps Air Station (MCAS), El Toro, California. MAC will reconfigure the cargo for ground movement at MCAS El Toro. Marine Corps security will assume custody from MAC and provide appropriate security for the cargo on MCAS El Toro until execution of Phase III.
4. Phase III - Loading and movement from MCAS El Toro to designated NARA facilities on the West Coast. Commercial tractor trailers, contracted by MTMC will arrive at MCAS El Toro for loading of the Presidential papers when the West Coast NARA facilities are prepared to accept the material. The NARA will assume responsibility and coordination of physical security when the Presidential papers depart the MCAS El Toro installation. Commercial carrier will load and transport the first move (November 1988) of Presidential papers to a warehouse at 24000 Avila Road, Laguna Niguel, CA, and place the pelletized cargo in designated grid locations at the facility. Commercial carrier will load and transport the second move (January 1989) of the Presidential papers to a warehouse at 8985 Venus Boulevard, Los Angeles, Ca, and place the pelletized cargo in proximity to the shelf location for archiving by NARA supervised personnel.
5. The National Archives and Records Administration will fully reimburse DOD for all incremental costs in accordance with standard interagency billing procedures. NARA will coordinate and arrange all physical security outside of DOD installations control and provide technical advice for physical protection unique to the material. Government Bills of Lading (GBL) will be issued by NARA.

6. The Department of Defense will provide command and control element to maintain operational control of the movement of the Presidential papers from the NCR to the designated facilities in California. Technical advice on movement and security, appropriate communications support, clearance on to DOD installations, personnel support, contract support/arrangements for movement, and development of the movement plan are the responsibility of DOD.

III. THE TRANSITION OFFICE IN LOS ANGELES

The Presidential Transition Office was responsible for coordinating and directing all the arrangements necessary to have the future office of President Reagan open and running efficiently on January 20, 1989. In August 1988 a lease was signed for office space and an architect and interior designer selected. The actual build-out of the space was done by the General Services Administration and the cost was covered by the GSA Public Building Fund.

All other expenses of the Transition Office are paid through funds appropriated by the Transition Act of 1963. As these funds do not become available until December, it is necessary to make all the decisions concerning the furnishings, equipment and supplies for the office in advance and order them on the first day the funds are at your disposal.

The progress of the build-out, as well as the arrival of all the furnishings should be monitored carefully so the office will be running efficiently on the first day and through the first weeks as this will be an extremely busy time. Fred Ryan or Ann Marie Lynch was in daily contact with Mike Lawson, the GSA field officer in charge of the build-out. Fred and Ann Marie went to Los Angeles for the final walk-through in early December. Keep in mind, that once the Former President is in the office, the Secret Service does not like to have workmen, movers, or other non-staff persons present during his working hours.

THE FOLLOWING IS A SUMMARY OF THE ITEMS WHICH MUST BE SELECTED, ORDERED AND IN PLACE FOR THE OFFICE TO BE FUNCTIONING WHEN THE PRESIDENT ARRIVES:

PERSONNEL:

The most important element in the office is, of course, the personnel. The Reagan Transition Staff consisted of fifteen people, fourteen of whom were on the White House Staff and had worked and traveled together. The other staff member was from the Commerce Department. Most of the staff was hired by August 1988. In addition to everyone knowing the office style and procedures preferred by President Reagan, he felt comfortable surrounded by familiar faces.

THE LOS ANGELES OFFICE PERSONNEL

Chief of Staff	Fred Ryan
Executive Assistant	Kathy Osborne
Director of Public Affairs	Mark Weinberg
Director of Scheduling and Planning	Sandy Warfield
Director of Correspondence	Jeanine Chase
Deputy Director of Scheduling	Joanne Hildebrand
Administrative Assistant	Suzie Talaat
Executive Assistant to the Chief of Staff	Selina Jackson
Senior Receptionist	Dottie Dellinger
Staff Assistant for Public Affairs	Paula Franklin
Secretary to the Director of Correspondence	Kerry Geoghan
Correspondence Assistant	Keri Douglas
Scheduling Secretary	Sheri Semon

THE JACKSON PLACE OFFICE PERSONNEL

Director of Administration	Ann Marie Lynch
Transition Staff	Kim Sandie

Beginning in November 1988, Fred Ryan conducted weekly staff meetings with the Los Angeles Staff. An Office Procedures Manual was prepared, defining the office hours, leave policy, etc. In December, 1988 one staff member moved to Los Angeles and officially opened the office. Gradually others were added so by January 20, 1989 there were six people already in place. The rest of the staff began work in the office on January 23, 1989. In February, two staff members returned to Washington to work in the Washington Transition Office (716 Jackson Place, N.W.).

The actual transferring of the personnel records of the outgoing staff from their current status to the payroll of the Transition Office was handled by Anita Bevacqua, Director of the White House Personnel. See her detailed report under tab C in this manual.

In addition to having personnel in place as early as December to accept and supervise the placement of the equipment, supplies and furnishings, the staff planned and coordinated the Welcome Home Ceremony for President and Mrs. Reagan. This event was held at the Los Angeles Airport and consisted of entertainment (Rich Little, Robert Stack); a welcoming committee, headed by Mayor Tom Bradley and members of the Ronald Reagan Presidential Foundation; live music by the USC band and a V.I.P. reception in a nearby hangar. This event was funded through private donations.

TELEPHONES

Abbreviated WHCA communications support was offered to President Reagan for a six month period of the Transition on a non-reimbursable basis. This followed the precedent set by previous administrations. Often the incumbent President will call the former President to consult with him on national security issues and to discuss unfinished matters left pending during the prior Administration. The furnishing of this communications equipment has always been considered to be within the authority of the incumbent President. WHCA provided a secure (STU III) phone for President Reagan's Personal Office, telephone services to the residence, three cellular phones and six pagers for staff use.

The AT&T Merlin II System was selected for the office because it had been chosen by the Secret Service and was the most secure phone system on the market at the time.

In addition to security, the Merlin II, available in a 10 or 34 button phone in black only, provided all of the features requested by the staff including: speed dialing, conference calling, speaker attachment, intercom, privacy and do not disturb programs, ability to program each set to ring or not, and a hands-free operation. This system also offered the possibility of expansion up to as many as 30 lines and 70 phones.

Wayne Nowak of The White House Communications Agency designed the communications plan from the blueprints for the Former President's Office. He made a site visit to meet with the local PacTel and AT&T representatives to review the installation of the system.

Special numbers were requested for the Office, which were granted and checked out by the PacTel representative.

See the Approximated Pricing For Equipment and Service on the following page for complete details of the actual purchase. Also, following is copy of the memo authorizing WHCA support for the Former President.

December 7, 1988

APPROXIMATED PRICING FOR EQUIPMENT AND SERVICE- PRESIDENT REAGAN MERLIN II

Equipment List	Price		Qty	Buy Total	Install Charge
Merlin II Base Unit.	\$800	X	1	800	100
4 Line ' 8 Terminal Module...	1370	X	3	4110	150
4 Line Module.	650	X	1	650	50
Feature Module I.	500	X	1	500	150
34-Button Set.	550	X	14	7700	200
10-Button Set.	475	X	4	1900	80
CPA (For Stu III).	160	x	1	160	20
Hands-Free Unit.	255	X	3	765	60
Long Handset Cord.	5	X	18	90	50
Amplified Handset.	65	X	1	65	20
Surge Protector.	50	X	1	50	10
Equipment List Totals.				\$16790	\$970
Additional Equipment Costs					
32 Hours of Work X \$60/hr					1920
Material Charge (wires, connectors, splices,etc)					1885
Grand Totals.				\$16790	\$4775
Monthly Maintenance on Above Equipment. \$100					

Service List	Qty	Monthly	Total-Month1y	Total-Install-Charge
Phone Lines.	10 X	\$15	\$150	\$1155
FTS Lines.	4 X	156	624	744
Service Totals.			\$774	\$1899

TOTAL PRICING

Buy Merlin	\$16,790
All Install Charges	6,674
Service Monthly Charges	774
Equipment Maintenance Monthly Charges...	100

**** Optional, but recommended.

**THE WHITE HOUSE
WASHINGTON**

January 4, 1988

MEMORANDUM FOR: M. B. Oglesby
FROM: FREDERICK J. RAYN, JR.
(dictated by phone)
Subject: WHCA Support for Former President Reagan

In the past, incoming presidents have provided WHCA support for the outgoing president. This support is less inclusive than the full package the sitting president receives. We are requesting generally the same level of support that has been provided for other former presidents updated to include today's technology.

This includes the following: a White House switchboard with full service to the President's residence and office, a limited number of cellular phones issued to staff and a limited number of pageboys issued to staff.

This is significantly less than the standard White House Package. We are not seeking home signal drops or secure voice phones (with the exception of one STU-3 which is being offered to all former presidents by previous approval from Colin Powell.)

With the exception of January 20, arrival day, we are not requesting additional WHCA assistance such as staff radios, hotel drops, sound and lighting. As you know, we have requested this full assistance through January 20.

Without talking to a WHCA technical specialist, this is the best indication I can tell that we need. However, it may turn out that I am omitting something that WHCA could provide with little effort.

Please let me know if you need any additional information.

**OFFICE OF THE VICE PRESIDENT
WASHINGTON, DC**

January 6, 1989

TO: The Vice President
FROM: Thomas J. Collamore

The attached follows up on your discussions last week with Craig concerning the WHCA support requested for President Reagan in California for the six months after he leaves office.

After discussion with White House staff we believe the attached now represents a reasonable request, consistent with the level of support provided Presidents Ford and Carter (background attached).

We are ready to approve the request, subject to your concurrence.

Okay _____ Other _____

Attachments

FAX

The Pitney Bowes Corporation donated a fax machine to the Ronald Reagan Presidential Foundation. The Foundation offered to share this with the Office of Ronald Reagan if it could be kept in their office. It was a Model 8000 and the dimensions were given to the architect so a proper shelf could be built for it. It was installed in early January.

COPYING MACHINE

A Xerox Model 5028 was selected in August and the dimensions given to the architect so appropriate space could be included in the design of the office. It was installed in early January.

FURNITURE

President and Mrs. Reagan asked Ted Graber, their friend and Interior Designer, with whom they had worked in the White House, to design the President's Office in Los Angeles. Mr. Graber and his Associate, Peter Schifando, worked closely with the architect in the design of the space before selecting the furnishings. They chose the carpet and draperies for the whole office, all the desks, chairs and filing cabinets. Mr. Graber selected and purchased all the furnishings for the President's Personal Office and the Conference Room. These two rooms were completely financed by the Ronald Reagan Presidential Foundation as the Board of the Foundation decided they wanted to own these items and eventually use them in the Reagan Library.

The remaining office furniture, namely for the reception areas, was handled by the Presidential Transition Staff with the assistance and guidance of Sig Girgus, the GSA Interior Designer at the White House. Sig proved invaluable as she had worked with Mr. Graber before and knew what sources to look to for items both he and Mrs. Reagan would like and which would be a compliment to the furniture selected for the President's Personal Office and the Conference Room. Once a decision was made, samples, pictures, etc. were sent to Ted Graber for final approval. The cooperation among everyone resulted in a very coordinated and attractive suite.

TYPEWRITER

Initially five IBM Selectric models were leased through GSA. It was impossible to gauge how many people would want a typewriter until everyone became familiar with the computers. It was determined that the office did need five typewriters, so in May five IBM Wheelwriter 10 models were purchased.

SAFE

A standard one-drawer safe was leased with an option to buy. The decision to lease was to determine if indeed the office would have a need for one. It proved to be frequently used for storing documents and cash. In May this safe was purchased.

NEWSPAPERS & MAGAZINES

Kathy Osborne, Executive Assistant and Mark Weinberg, Director of Public Affairs, decided on what magazines and newspapers to order for the office. These were ordered through ARA, a national magazine/newspaper distributing company, who delivered them in bulk to the office at a twenty percent below newsstand price. ARA did not handle certain newspapers or magazines, so some individual subscriptions had to be obtained.

TELEVISION AND VCR

Televisions and VCRs were purchased to be placed in the President's Personal Office, the Conference Room, the offices of the Chief of Staff and the Director of Public Affairs. These were purchased from Adray's, a local discount electronics store in Los Angeles.

As with all purchases for the office, every effort was made to buy American produced items.

KITCHEN EQUIPMENT

The Fox Plaza Building did not have a cafeteria, so a miniature kitchen was installed in the President's office suite. Utensils, plates, bowls, glasses and mugs were purchased for the kitchen through the Adams/Burch Industrial Supply Co. in Tuxedo, Maryland (301-772-7050). Ron Jackson, Presidential Food Service Coordinator, recommended patterns and the amount of each item to order. He selected very plain, industrial strength, institution style for everyday use. These items proved to be very useful and helped eliminate paper and plastic products being left around the office.

COMPUTERS

In designing a computer system for the correspondence section of the Office of Ronald Reagan, two options were studied. The first being a mini computer with multiple dumb terminals that would have enabled the section to share a common data base and printer. The second option being personal computers. While the former would have been the most organized and most efficient, it proved to be far too expensive both initially and in the long run.

After consulting with members of the White House Communications Agency and various computer specialists at the White House, we purchased from Government Technology Services, Inc. the IBM Personal System/2 Model 30 -28 using Word Perfect 5.0, Word Perfect Library and Many Link (network software) and a Hewlett Packard Laser Jet Series II printer. As well, we have communication ability with Western Union and the National Archives mainframe.

As well, we purchased the same set up for the administrative section, the public affairs section, the Chief of staff's office and the scheduling section. The only modifications to these systems was the addition of LOTUS 123 software to two of the sections.

I would strongly recommend that an independent computer specialist be contracted to do the job of designing a computer system. Such a project requires time as well as computer expertise which usually comes only with years of experience in the computer industry.

STATIONERY

The stationery for the Office of Ronald Reagan was handled by Jeanine Chase, Director of Correspondence. She solicited the assistance of the Director of O.A. Publishing, Charles Morris, at the White House and Bethesda Engravers, Inc. which is the company the White House uses as their primary stationer for special projects. The quality and design of President Reagan's stationery was based on samples of stationery used for other former Presidents. It should be noted that the Great Seal of the United States is used, not the Seal of the President.

Bethesda Engravers does a beautiful job but they are quite expensive and often over extend themselves with too many projects. We would suggest that a smaller stationer in the same city as the Transition Office would be more cost efficient and perhaps more inclined to provide personalized service.

The amount of stationery ordered was based on a loose estimate of what was being used by the President and his staff at the White House for non-official correspondence. These amounts proved to be adequate for the first few months of the Transition. Jeanine Chase and her staff kept an accurate inventory and the supplies were replenished as needed.

The following two pages outline the initial order placed in December 1988 to Bethesda Engravers.

PREPRINTED MESSAGE CARDS

thank you for your support	50,000
envelopes	50,000
generic thank you for your letter	2,000
generic thank you for your support	2,000
thank you for birthday message	2,000
generic congratulatory message	2,000
wedding congratulatory message	2,000
newborn congratulatory message	2,000
anniversary congratulatory message	2,000
birthday congratulatory message	2,000
get well message	2,000
sympathy message	2,000
envelopes	20,000
thank you for sharing your views	2,000
envelopes	2,000

PRESIDENT REAGAN'S STATIONERY

monarch (7 1/4 X 10 1/2) letterhead	10,000
monarch second sheet	2,500
monarch envelopes	10,000
personal (6 3/8 x 8 1/2) letter head	10,000
personal second sheet	2,500
personal (6 3/8 X 4 1/4) cards	10,000
personal envelopes	20,000

PRESIDENT REAGAN'S STATIONERY (FOR STAFF USE)

monarch letterhead	30,000
rnonarch second sheet	7,500
monarch envelopes	30,000

OFFICE OF RONALD REAGAN STAFF STATIONERY

standard (8 1/2 X 11) letterhead	20,000
standard second sheet	10,000
standard envelopes	20,000
personal (6 1/4 X 9 1/4) letterhead	20,000
personal second sheet	5,000
personal (6 1/4 X 4 5/8) cards	20,000
personal envelopes	40,000
mailing labels	10,000

IV. THE LIAISON WITH THE RONALD REAGAN PRESIDENTIAL FOUNDATION

The Presidential Transition Office also served as the liaison with the Ronald Reagan Presidential Foundation as the Foundation would play such an important role in the President's life after leaving office.

The Ronald Reagan Presidential Foundation was created in February 1985 to fund the design and construction of the Presidential Library and Center for Public Affairs.

Fred Ryan and the Presidential Transition Staff assisted the Foundation in the selection of the design firm for the museum space in the Library. In January 1988, research began by talking to those firms who had been involved in other Presidential Libraries. In addition, the staff consulted the directors of the National Archives, the Smithsonian and the United States Information Agency. A list of over fifty potential design companies was generated and these firms were asked to submit samples of their work. Following a review of these materials, fifteen firms were invited to make formal presentations to Robert Higdon, Financial Director of the Ronald Reagan Presidential Foundation; Fred Ryan, Elizabeth Penniman and Ann Marie Lynch.

Six firms were selected to give a presentation to the Board of Trustees of the Foundation. Three firms presented at the July meeting and another three in September.

At the September meeting, the Board selected the proposal by Donovan and Green, Inc./Stuart Silver Associates. They were given a three phase contract and immediately began work on the first phase.

The staff of the Presidential Transition Office continued to coordinate with Donovan and Green during their initial work. Donovan and Green were looking for speeches, videos, artifacts, gifts and photos to use in the Reagan Presidential Library.

In January 1989 the Ronald Reagan Foundation began looking for a candidate to be the liaison with the design firm and to serve as a curator for the library.

The close relationship between the Ronald Reagan Foundation and the Presidential Transition Office allowed the two to join together and coordinate all planning for events and activities for President Reagan once he left office to be incorporated into his schedule in advance. Because Fred Ryan was a member of the Board of Trustees and would be the Chief of Staff to the President once he left office, he was able to keep President Reagan informed on the activities of the Board of Trustees and to respond to scheduling requests from the Board for the President to travel or attend events on their behalf.

V. THE DEPARTURE GIFT

The President and Mrs. Reagan wanted to give a special gift as a token of their appreciation to the Cabinet Officers, a select number of Administration officials and foreign leaders, and special friends. We obtained the assistance of John Rogers, former Director of the White House Office of Administration. He suggested a special bowl be designed.

The departure gift was a hand-painted porcelain, Moattahedah monteith bowl with the Great Seal on eight sides and space for four short quotes representative of the eight years of the Reagan Presidency. On the bottom of the bowl were the words: "Presented by President and Mrs. Reagan recalling eight memorable years 1981 - 1989."

These gifts were paid for with funds from the Republican National Committee as was the procedure for all Presidential gifts.

The Presidential Transition Office researched the President's speeches to find the appropriate quotes and compiled the list of suggested recipients for approval by President and Mrs. Reagan. The staff also coordinated with the White House Office of Administration for packaging, wrapping and delivering these gifts.

VI. PREPARATION OF THE REAGAN TRANSITION FINAL REPORT

As stated previously, when the planning began for the outgoing transition of President Reagan there was very little information available from previous administrations. Fred Ryan decided in the initial planning stages to ask everyone involved in the planning and execution of the Reagan Transition to keep records of his/her participation and after January 1989 the Transition Staff would collect these records and merge them into a formal report for future presidential transition planning.

In February, 1989 Fred Ryan sent a letter to those members of the Reagan Administration, the officials at the General Services Administration, the National Archives and the Office of Management and Budget who had played a major role in the Transition. Not everyone who received this letter responded. Due to the press of other business, we did not receive a report from the Legal Counsel's Office or the White House Gift Unit. Both of these offices were very helpful and we suggest to future Administrations to contact both early in the transition planning.

See copy of Fred Ryan's letter on the following page:

OFFICE OF RONALD REAGAN

February 28, 1989

Dear

Thank you for everything you did to contribute to such a smooth transition for President and Mrs. Reagan. All of your efforts were very much appreciated and without you, the enormous task of planning and executing such a move would not have been possible.

When we began working on the Transition in June, 1988, we were surprised by the lack of guidelines, briefing books or reports left by previous Administrations. There was information available for the Incoming Transition but virtually nothing on the Outgoing.

For this reason, I would like to ask your help as we prepare a Report on the Outgoing Transition of President Reagan. This report will be left for future administrations to use in transition planning. Your contribution will certainly be appreciated and valuable.

The points I would like for you to cover are:

1. What was your specific role in the Transition? What were your responsibilities?
2. What was your time frame? When did you start to prepare?
3. How many members of your staff were involved?
4. What were the major problems you encountered?
5. What recommendations would you make for future Outgoing Transitions?

I would like to receive this information from you by March 24, 1989, if possible, so we can begin to edit and compile a final report. You will receive a copy of the report and will be credited with your contribution.

I have asked Ann Marie Lynch, whom you know, to coordinate this project. Would you please send your report to her: Office of Ronald Reagan, 716 Jackson Place, N.W., Washington, D.C. 20503. If you have any questions, you can call Ann Marie (566-0126).

Thank you for your cooperation With your help, I think we will be able to produce a comprehensive report, which will be a help to future Administrations, as well as a credit to the Reagan Administration.

Sincerely,

FREDERICK J. RYAN, JR.
Chief of Staff

name
address

.....
Once the reports were received, some as late as June, they were proof-read and edited by Kim Sandie and Ann Marie Lynch. The final version was put into a binder and distributed to all the contributors, the Ronald Reagan Presidential Foundation, the Office of Ronald Reagan, President Bush, Vice-President Quayle, and the following officials of the Bush Administration: John Sununu, Chief of Staff; Chase Untermeyer, Director of Personnel; Bonnie Newman, Director of Administration and Andrew Card, Deputy Chief of Staff. Several copies were saved for the Reagan Presidential Library, where they will be available for research purposes.

The Presidential Transition Office was responsible for coordinating the efforts of many different offices and directing the opening of the Transition Offices in Los Angeles and Washington. Because the initial planning was so thorough and the cooperation among the various White House offices and other Government offices was so good, the execution, once it began, encountered no major problems in any area. This office had almost daily contact with all the other offices involved in the transition.

We wish to extend a very special thank you to the following: Ray Fontaine, Comptroller, General Services Administration; David Haun, Budget Officer, Office of Management and Budget; Anita Bevacqua, Director, White House Personnel; and John Fawcett, Director of Presidential Libraries, National Archives. Their expertise and experience made the task of planning and executing the Reagan Transition as smooth and pleasant a process as possible.

RECOMMENDATIONS

Establish a Presidential Transition Office as early as possible, under the direction of the Chief of Staff of the former President. Hire a staff and have them identify the persons in each office in the White House and other Government offices, who will be involved in the transition. Arrange meetings for this group so they will know one another.

Plan for one staff member to be in place at the site of the future transition office three or four months before the office opens.

**THE WHITE HOUSE
WASHINGTON**

May 1, 1989

ANITA BEVACQUA
Director
White House Personnel

The role of White House Personnel during the outgoing transition of President Ronald Reagan was to act as liaison to the General Services Administration for the purpose of transferring the personnel records of the outgoing staff from their current government payroll to the payroll of the former president. Our planning began in late August 1988 and our goal was to complete the records transfer by January 16, 1989. It required only one staff member's involvement.

During the onset of transition planning in July 1988, and at the request and direction of Ann Marie Lynch and Fred Ryan, White House Personnel also coordinated post-government ethics and related personnel questions for the White House Counsel's Office to render an opinion. A major obstacle with the Counsel's Office was the time it took to receive an opinion. By October 1988, White House Personnel no longer participated in this effort and concentrated exclusively on the personnel information requirements.

Initially we attempted to locate any information on past outgoing transitions and the steps that were taken to handle the personnel items. I contacted our GSA liaison who provided me with a transition contact, general transition history and applicable laws. Our first problem was the realization that there was no single source for information. Information was available, but it was scattered amongst various individuals and agencies with the result being no compilation of pertinent data or instructions. One of the problems we also encountered at this point was the discovery that the staff of a former president was no longer eligible for retirement, health and life benefits. Historically, individuals subject to the Presidential Transition Act were considered government employees and therefore eligible for retirement coverage as well as coverage under the Federal Employees Health Benefits Plan (FEHBP) and Federal Employees Group Life Insurance (FEGLI). On January 8, 1988, technical corrections were made to the Act (enacted by Section 108 of Public Law 100-238) that eliminated this eligibility for the former president's transition staff.

Through the coordination of appropriate levels in GSA, OMB, OPM and the Office of Administration General Counsel's Office, this law was amended on October 19, 1988. This resulted in the restoration of health, life and retirement benefits for all personnel appointed to the transition staff of a former president who immediately prior to such appointment were employees of the federal government.

By early November 1988, we began supplying benefit information and guidance to the employees who were going on to the former president's staff. We compiled a list of all staff members outlining their specific benefits program and met with them individually

to explain the process of transferring their benefits and records. In early December we met with the Personnel Director of GSA and agreed to provide GSA with all personnel related documents that required the employees' signatures (e.g. tax withholding forms) as well as the approved personnel action (SF-52) signed by Fred Ryan who was the individual authorized to disburse funds from the former president's official account. Some of the former president's staff members were employed by federal agencies other than the White House, therefore we also coordinated with those personnel offices so that they would properly transfer their employee's records to GSA.

The majority of the staff members were appointed to the GSA payroll effective January 21, 1989. By January 16, 1989, all relevant personnel documents were turned over to GSA. After that period, our responsibility was to coordinate the transmittal of all final paychecks, lump sum annual leave payments, and the forwarding of W-2 statements. All of the above was sent to the former president's office on February 4, 1989, for distribution.

Part of our responsibility was also to act as a source of information for the staff member who would be handling the personnel files in the former president's office.

It is important to note that the White House Personnel Office is responsible for the maintenance of a President's tax forms as well as his W-2 statements. Therefore, we worked closely with President Reagan's attorney to forward his W-2 statement as well to verify that his payments as a former president were transmitted properly from GSA and the Department of the Treasury to his personal bank account.

RECOMMENDATION

By coordinating all necessary personnel information and therefore presenting a complete package to GSA we were able to control and verify the transmitted data. I strongly recommend that this method be used in the future. This task was certainly made easier by the fact that the majority of the former president's staff were White House Staff members and their information was readily accessible.

More important than monitoring the transfer, we were available to provide direct support to the staff. This service was greatly appreciated by the staff members and is an important reason to involve the White House Personnel Office. Also, my understanding from GSA is that past transitions have never had assistance in coordinating the necessary personnel information. They were grateful for our efforts and agreed that it was in the best interest of all parties to have White House Personnel involved.

Personally, it was a privilege to play a role in the transition of Ronald Reagan. I will always be grateful for the opportunity to be a part of his presidency.

**THE WHITE HOUSE
WASHINGTON**

April 3, 1989

JEAN LAMB
Administrative Officer
Office of Administration

Thank you for the opportunity to contribute my thoughts on executing a smooth transition between Administrations.

As the Administrative Office for the White House, with a staff of seven, we were responsible for the closing out of all administrative and financial records of the Reagan Administration. These records included travel, entertainment, payroll, purchase orders, and invoices. We worked closely with the GSA Archival staff to retire the Administrative files.

In addition to the above, my office was responsible for:

- The disposition of the Cabinet chairs to the individual Cabinet members.
- Cataloging, inventorying, and packaging of the Reagan Christmas cards from 1981-1988 to be shipped to California.
- The setting-up, in conjunction with the OA and White House Personnel Offices, of a consolidated check-out process for the departing EOP and White House staff.

In early August, we began to discuss, with the appropriate White House Offices, ways to coordinate a smooth transition. The major problem we encountered was, as the Administrative Office for the White House, we had to focus our attention on planning and executing the transitioning out of the Reagan Administration while concurrently planning and executing the transitioning in of the Bush Administration. As you stated in your letter, there was a lack of guidelines from previous Administrations and the above tasks were made much harder because we had to rely on institutional memory for guidance.

RECOMMENDATION

My recommendation for future outgoing transitions would be to start planning early. Administrative decisions requiring senior staff approval should not be delayed until the last minute. This can be a problem during the period between the election and the inauguration when time is a very critical element. It is also important to document each phase of the transition.

**THE WHITE HOUSE
WASHINGTON**

April 3, 1989

SALLY CAMPBELL
Office of Administration

As the liaison to the RNC and the keeper of the presidential gifts, my job for the transition was two-fold: build-up stock of all "favorite" gifts for later use and pack all remaining trinkets for shipment to the new office.

Although I can't be certain, I recall that I began to order an extra supply of gifts around September. These were mainly the small gifts which are easy to carry and store. The orders began coming in the last of November, and I just stored the boxes until shipment time. They were never unpacked, in order to keep them separate from the gifts we used to finish the Administration.

Because the gifts were an everyday demand, I was unable to take the weeks to pack as others did. About a week before the Inaugural, I eventually took whatever item had a large inventory first, but kept some in reserve. Archives did all the packing and moving of the gifts. With their help, we finally emptied the storage room the day before Inauguration. At that time I was released of all responsibility for the gifts.

RECOMMENDATION

The only major problem I encountered related to the fact that no one wanted to release all the gifts for packing at the same time. It was fortunate for me that the Archives plane was full, thereby giving the packers several days to finish after the President left with no risk of anyone calling for something. I suggest under similar circumstances in the future that a cut-off date be specified and adhered to — the problem we had could have cost a lot of money if the plane had been available on time.

The Archives people were wonderful to work with — we could not have completed our part without their tireless energy in packing our breakables.

**THE WHITE HOUSE
WASHINGTON**

June 2, 1989

REX SCOUTEN
Curator

Part of the transition planning includes the moving of the first family's personal possessions from the White House to their new residence. This is the responsibility of the White House Curator and the Chief Usher.

As with all other offices involved in the Reagan Presidential Transition, knowing the exact time the President would leave office, enabled the Curator's Office to begin planning early.

Beginning in December, 1987, the First Family's personal possessions were gradually taken from the residence and replaced with borrowed furniture from within the White House. This allowed time for the personal objects to be repaired, cleaned, reupholstered or slip-covered, packed and shipped to the Reagans new residence in Los Angeles. The actual shipping began in August, 1988. As in past administrations, the items were shipped when space was available on already scheduled military aircraft. The Military Office was very cooperative in notifying the Curator when planes would be available.

Mrs. Reagan, Ted Graber, Rex Scouten and Gary Walters were responsible for all the decisions, arrangements and dates involving the transition of the personal possessions.

The packing, including the building of special crates, and cataloging of all items was handled by the White House Residence Staff under the direction of the Curator and the Chief Usher.

There were no problems encountered in any of the arrangements involving the moving of the first family's possessions from the White House.

RECOMMENDATIONS

MOST IMPORTANT: Keep a very precise inventory on every item belonging to the first family. Note when each item comes in, where it goes and when it leaves. This same procedure should be adopted for any State gifts selected from the White House Gift Unit by the President or First Lady for use in the residence.

I also recommend Congress consider changing the laws governing the limitations set on the value of gifts that can be accepted by the President and Vice-President.

**EXECUTIVE OFFICE OF THE PRESIDENT
OFFICE OF MANAGEMENT AND BUDGET
WASHINGTON, D.C. 20503**

May 1, 1989

DAVID HAUN
Budget Examiner

I was the Office of Management and Budget's (OMB) budget examiner for the General Services Administration (GSA) and the National Archives and Records Administration (NARA). As you know GSA and NARA are the two primary Executive agencies involved in Presidential transitions. GSA has statutory responsibility to provide office space and support for transition and former President's staff and to manage the appropriation for Presidential transition. NARA is responsible for the handling of Presidential records and gifts and the eventual management of the Presidential libraries once completed.

As the budget examiner for these accounts, my responsibilities were to oversee the agencies' management of these programs to ensure proper utilization of funds and consistency with policy and statutory authority. In addition, I was also responsible within OMB for issues relating to transition. The Director and Deputy Director were asked to testify on proposed legislation amending the laws pertaining to transition. I provided staff support including analyzing proposed legislation, drafting testimony, and preparing background briefing materials. I also provided OMB staff support to the White House staff on issues relating to transition planning.

I assumed the responsibilities of budget examiner in February 1985. Preparation for the transition began almost a year and a half prior to January 1989, in September 1987. This is when GSA and NARA submitted their 1989 Budget requests to OMB for review.

OMB involvement in transition continued through the review of the budget, submission of the budget to Congress, and eventually to the transition itself. Throughout this period OMB provided staff support for the budget and legislative process.

I was the only budget examiner overseeing the affected accounts in GSA and Archives. Other OMB staff were involved in the review of legislation and the communication of the Administration's position on legislation.

From our perspective, we encountered relatively few problems in the planning for and the actual transition itself. The more difficult effort was developing Administration positions on the various legislative proposals that were proposed by the House and Senate.

RECOMMENDATION

(1) An outgoing Administration needs to work with GSA and NARA early to plan where they are going to relocate and work out specifics with these agencies. (2) Limit the number of contact points at GSA, NARA, OMB, and the White House in order to ensure accountability and simplify communication. (3) Plan for transition even if the Administration plans to be re-elected. The plans will not be wasted if reelected, in that they will serve as the basis for transition after the second term.

THE NATIONAL ARCHIVES
WASHINGTON

April 28, 1989

JOHN FAWCETT
Assistant Archivist
for Presidential Libraries

**TRANSFER OF REAGAN PRESIDENTIAL
RECORDS FROM WASHINGTON TO
CALIFORNIA**

Background

Planning for the transfer of Presidential materials is the responsibility of the Office of Presidential Libraries (NL) in coordination with many units in NARA, the White House, the Department of Defense, the General Services Administration, and private contractors.

As organized and executed during the Reagan/Bush transition, the allocation of responsibilities for transfer of Presidential records was as follows:

National Archives and Records Administration

- Overall Coordination and control
- Planning
- Funding
- Collection of Presidential Records
- Archival control during move
- Preparation of temporary space
- Staffing
- Transport of materials
- Security
- Administration of records after January 20.

Units involved:

- Office of Presidential Libraries
- Office of Management and Administration
- Detailees from other offices

White House

- Review of and concurrence in all plans
- Notification of White House Staff of move dates and requirements
- Assuring Compliance with Presidential Records Act
- Assignment of control (oversize attachment) numbers to archival materials
- Boxing and labeling of materials with NARA assistance
- Security on White House grounds

Units involved:

- Appointments and Scheduling
- Counsel to the President
- Office of Administration
- Office of Records Management
- Secret Service Uniformed Division

Department of Defense

- Contracting for all trucking
- Labor Services (At White House, Andrews AFB, Norton AFB, Los Angeles)
- Air transport
- Command and Control of operation while materials in transit
- Security on military bases

Units involved:

- Director of Administration and Management
- Military Support Action Officer (Army)
- Operations Cell: XVIII Airborne (Army)
- Materials Movement Command
- Military Airlift Command
- Aeroport Squadron Andrews AFB
- Aeroport Squadron Norton AFB
- Army, Ft. McNair
- Navy, Long Beach

General Services Administration

- Preparation of storage space, with funding from NARA
- Security during ground transport
- Liaison with local law enforcement agencies

Units involved:

- Public Buildings Service, Central Office and Region 9
- Federal Protective Service, National Capital Region and Region 9
- White House Area Manager

Private Contractors

- Ground transport
- Cargo handling equipment (White House, West Coast)
- Cargo loading, White House
- Unloading, West Coast

Contractor:

- North American Van Lines

Planning and Preparation

Planning for a Reagan Library began with the beginning of the administration. Consultations between NARA and White House officials on the administration of Presidential materials were all based on the common assumption that materials would be placed in a Reagan Library. During the course of the second Reagan administration, NARA provided advice and information to administration officials to aid

in the selection of a library location. Planning for the actual move of materials began in earnest after the President selected the site in Ventura County.

Temporary Storage Facilities

In the Spring of 1988, NARA officials began to work with Region 9, GSA to locate a suitable facility to store the Presidential materials pending construction of a library. A NARA survey of the Reagan materials stored in the White House complex and NARA was used as the basis for storage capacity needs. Two facilities were located: Space in the Chet Holifield Federal Building, Laguna Niguel. This space was modified for storage of museum items intended for the Reagan Library. Space in the Globe A-I building in Los Angeles. This space was modified for storage of the Presidential papers. Modification of both spaces was initiated in early summer, 1988 and was completed in late October. This was an extremely hurried schedule for the extensive modifications necessary, including construction of vaults and addition of all security systems.

Archival Administration of Transfer

Planning for the archival management of the transfer of materials began with the detail in Fall 1987 of a National Archives archivist (Rod Soubers) to the Office of Records Management (ORM). His duties were to learn White House records keeping systems and to assist ORM in surveying the records in the White House complex, principally to determine the volume for shipment and space planning purposes. The first complete records survey was completed in December 1987.

Detailed planning for the transfer of materials began in Spring 1988 with a series of meetings between Office of Presidential Libraries personnel and White House Officials. Subjects of these meetings were allocation of responsibilities (Appointments and Scheduling, Office of Records Management), transfer of automated records (Office of Administration, WHCA), Surveys of materials (Office of Records Management), and archival and legal administration of the records (Counsel's Office). From these discussions decisions emerged on the treatment of automated records (NARA would purchase a computer and OA would transfer tapes at the end of the administration), scheduling of the move (in two segments, November for museum items, January for records), and on archival administration of records (a team of archivists was assembled to begin reviewing selected Reagan materials and to begin preparing the materials for transfer).

Surveys of Presidential records were accomplished throughout 1988 and revealed the magnitude of the transfer operation. It was estimated that by the end of the administration there would be 20,000 to 25,000 cubic feet of textual records to move (at least 6,000 of which would contain security classified material) and approximately 30,000 museum items amounting to 25,000 cubic feet of crated and boxed material.

The materials were to be moved from four locations. The White House complex contained materials scattered in office files in the East and West Wings, the New EOB, the Old EOB (approximately 2000 cubic feet of the materials in the Old EOB were stored in ORM filing equipment and storage rooms).

National Security Council Presidential files were stored in Warrenton, Va. Overflow ORM files and Presidential gifts were stored in the National Archives Building. Printed materials were stored at the Washington National Records Center in Suitland, Md. It

was decided that audiovisual materials would remain in Washington, stored in the National Archives building for ease of administration until a permanent library building was ready.

The two previous administrations (Ford and Carter) had been closed out on relatively short notice because planning depended on the outcome of elections. The additional lead time afforded by the completion of two full terms by President Reagan made it possible to more closely control the archival administration of the materials and to move the Presidential records in better order than in the past. In addition, developments in computer technology gave archivists better tools to manage the records transfer. Accordingly, NARA's Systems Management Division (Stephen Hannestad) developed a system to control each box of material during the transfer and to pre-assign each box to a shelf location at its destination in the temporary facility. During the transfer operation, each box was given a preprinted label as it was loaded on a shipping pallet. The NARA survey of the Reagan materials in December 1987 was used to determine volume estimates and shelf allocation. The labels were divided into segments for each major file category then subdivided into packages of 30. The label included a unique serial number and an eventual shelf location. As the 30 box pallets were completed, a pallet inventory was created which listed the box serial number and a short description and a pallet number was assigned. The pallet number would provide control during shipment. The numbers and descriptions were then entered in a computer to provide the ability to rapidly retrieve information using the numbers or the descriptions. Pallet numbers remained the basic unit of control during the subsequent transshipments from point of origin to trucks, from trucks to air pallets, air pallets to airplanes, unloading from airplanes to trucks, and unloading from trucks at the destination. This system of control worked well.

Transport Planning and DOD Assistance

In past Presidential moves NARA had received assistance from the Department of Defense, which had provided security services and staging areas at military bases. NARA recognized the value of military assistance in moving the Reagan materials in view of the long distance and the amount of material to be moved. NARA determined to ask DOD for help with transport and staging areas, but decided not to ask for military help with security outside of military areas because of the lack of police powers.

In March 1988, the NARA officials met with D. O. Cooke, DOD Director of Administration and Management, to brief him on the nature of the project ahead and to request military assistance in the areas mentioned. Subsequently, Army Major Lee McMichael was assigned as action officer for the project. Major McMichael coordinated arrangements for military assistance, including an analysis of the alternative modes of transport available to move the materials to California. After discarding alternatives such as shipment by sea and shipment by piggyback rail, the two which remained were air transport and truck transport. Each had points to recommend them. Air transport minimized exposure time in transit and made security easier. Truck transport had a minimal possibility of catastrophic loss of the historical record and seemed to promise less possibility of loss of archival control of the materials because there was no transshipment necessary between modes of transportation. Over the next several months, the alternatives were studied until the decision point came in October. At that point, DOD recommended military air transport and NARA concurred. It was further decided that the materials would be moved in two

operations. Movement of the gifts (valuable but not as historically significant as the papers) would take place in November and would provide a trial run for the movement of papers in January 1989. DOD also agreed to contract with a trucking firm for the ground portion of the move on both coasts. NARA would reimburse DOD for the costs.

General Movement Plan

By October 1988 a general plan for the transfer of the materials was in place:

- National Archives employees, assisted as necessary by ORM staff and an Army labor crew would collect materials at points of origin, document the records, and ready them for shipment.
- North American Van Lines (NAVL) would provide ground transport to Andrews AFB and from Norton AFB to destinations.
- GSA Federal Protective Services officers would provide security escort from point of origin to Andrews AFB and from Norton AFB to destination.
- Air Force Military Airlift Command (MAC) personnel would unload the trucks at Andrews AFB, ready the materials for shipment, and provide air transport by Air Force C5B cargo planes to Norton Air Force Base, San Bernardino, CA. El Toro Marine Air Station had been investigated as a possible destination, but was rejected because of lack of equipment and personnel for such a mission. Norton, as a MAC base, could handle such an operation routinely. MAC personnel would unload at Norton and load North American Van Lines trucks.
- NARA personnel would monitor shipments, document all transshipment activities, and provide on-site direction throughout shipment.
- Museum items (November shipment) would go to Laguna Niguel facility, with unloading labor provided by NAVL with the assistance of NARA Laguna Niguel Federal Records Center employees.
- Presidential Records (January shipment) would go to the West Los Angeles facility, with unloading the responsibility of NAVL, and shelving of materials to be done by a crew of Navy seamen from the Battleship New Jersey.
- DOD would provide an Operations Cell to accompany all shipments and act as the liaison between NARA and the Military. See attached After Action Report.
- Air Police provided all on-base security.
- NARA's 32" x 36" pallets hold 30 Federal Records Center boxes. A 48-foot 102-inch wide van will accommodate 42 such pallets placed three abreast and 14 deep, yielding a tight load that will not shift in transit. Six of NARA's pallets fit on a 88" x 108" 463L air pallet and were well under the 96" maximum allowable height.

Execution

November Operation

The transfer of Reagan Presidential materials began on November 4-6, 1988, with the loading of gift and printed materials simultaneously from the National Archives Building and the Washington National Records Center (WNRC) at Suitland, MD.

84 pallets of printed materials were moved from WNRC to Andrews AFB in 2 48-foot vans. Gift materials were moved from the Archives building in 27-foot vans. The smaller trucks were necessary because of the constricted access to the loading area. The loading area can accept 40-foot vans if the landing gears fold; however NAVL did not have such vans and was only able to lease the smaller vans. It required two days and 16 trucks to move the 127 pallets and 400 crates to Andrews AFB. Estimates of the total number of crates to be moved proved to be low.

The trucks departed from the National Archives building as they were loaded and were escorted to Andrews AFB by Federal Protective service, four officers in two cars, one leading, one following. When the materials arrived at Hanger Two, they were unloaded by MAC and NARA personnel and placed on air pallets. Each air pallet was inventoried by NARA personnel before it was covered and secured with straps by Air Force personnel. Building of most of the air pallets was time consuming because of the many odd sized crates and packages. Materials which were packed on standard NARA 32" x 36" shipping pallets were loaded easily and quickly, 6 NARA pallets to a 88" x 108" air pallet. As the air pallets were completed they were weighed and set aside for loading onto the aircraft. MAC produced a manifest for each planeload as it was completed. Each C5B held a maximum of 35 air pallets of cargo.

The November mission consisted of two C5B flights which departed Andrews on November 6 and November 7 for Norton AFB. The flights left at approximately 1000 EST and arrived at 1200 PST. Air Force crews were standing by the download immediately as the aircraft landed. NAVL trucks were waiting for immediate loading at the Norton freight terminal. Each flight filled six 48-foot trucks. The trucks were loaded in approximately three hours, secured, and moved to a staging area, where they were placed under armed Air Force security until 0900 the next morning when the convoy departed for Laguna Niguel. The first convoy moved on November 7, the second on November 8. Each convoy was escorted by 2 NARA rental vehicles, one Army rental vehicle, and California Highway Patrol vehicles. Radio communications were maintained between all escort vehicles. Both convoys were uneventful.

Trucks arrived at Laguna Niguel about 1200 and unloading took approximately three hours. Unloading was performed by NARA Federal Record Center employees, NAVL personnel, NARA escort personnel, and the Military operations cell. The contract personnel were to have unloaded but their numbers were not adequate to the task. Crated and boxed gifts and palletized gift and textual materials were placed on a grid marked on the floor of the general storage area and the vault. A location register was created by grid location and box, crate and pallet number after all materials were in place.

The transfer of all materials intended for Laguna Niguel was complete by close of business November 8.

Although the November movement went relatively smoothly, several lessons were learned:

- A larger labor force was needed at Andrews AFB to unload trucks and load air pallets because the odd-sized crates had to be loaded by hand and not by forklift.
- A larger labor force was needed to unload and store materials at the destination.

- Telephone communications for NARA personnel were necessary at both Norton and Andrews. NARA telephone lines were installed at both bases for the January move.

- Better estimates of volume of materials to be shipped were necessary to properly plan storage space. Gift boxes and crates had to be double stacked because of underestimates of volume.

- Uniform crates for gifts would have simplified the building of air pallets at Andrews.

- Redesign of gift crates required. The nailed plywood crates often came apart during handling, necessitating time consuming renailing or strapping.

- Whenever possible materials should be placed on wooden shipping pallets for ease of handling.

January Move

Accurate estimates of the volume presidential records to be moved were critical to the success of the January transfer. Original estimates of 24,000 cubic feet were high, however it proved easier to drop to 3 flights from the 4 that were originally planned than to add flights to an already tight schedule. Surveying of records on the White House complex continued through the third week in January to assure that preparations were adequate.

The January operation consisted of the transfer of approximately 18,000 cubic feet of records, approximately half from the National Archives Building and Warrenton and half from the White House Complex.

Marshalling the materials for shipment began on December 10 with the palletizing and loading of 2000 cubic feet of classified materials which had been accumulated in secure storage in Warrenton, VA. NARA had encouraged the NSC Secretariat to allow the shipment of these materials as early as possible. It was necessary to palletize and document the material on a weekend because of the facility's normal weekday workload. A National Archives labor crew and team of 5 archivists worked with a 20-member team of facility employees which pulled the records from the storage area. All involved required at least Top Secret clearance. The archivists applied pre-printed box labels and inventoried the pallets, the NARA labor crew shrink-wrapped the pallets and loaded two 48 foot vans. The work was accomplished in one 8 hour day. The vans were placed under security within the compound and were moved the next day with FPS and State Police escort to secure storage at NARA's Pickett Street facility, where they were held pending shipment with the first January planeload.

Readying for shipment the materials held in the National Archives Building was time-consuming and cumbersome because they were stored randomly in several storage areas. Materials had come in as overflow from the White House Office of Records Management (ORM) over the course of several years. They were controlled by Oversize Attachment (OA) number in a computerized location register. The materials had been shelved randomly as they arrived. To arrange materials for ease of shelving at the destination, materials from widely separated shelf positions, and from separate stack areas, were integrated on the shipping pallets in OA number order. The integration of materials, palletizing, wrapping, and inventorying of the 6000 cubic feet of NARA-held records occupied 10 to 15 staff members for the two weeks prior to

shipment during the first week of January. The schedule was very tight and the work was completed at the last moment. The decision to ship the boxes in OA number order caused substantial delays.

Collecting and packing of records for shipment from the White House complex began formally on December 1 with the issuance by the Counsel the President of a memorandum to the White House Staff. The memorandum gave a deadline of January 10 for materials to be turned over to ORM for shipment. This deadline was not widely observed and it took much reminding and cajoling by NARA staff stationed in the EOB to persuade staff offices to relinquish records before the last minute. This has been the common experience at the end of all administrations. Because many staff offices were reluctant to give up records until the last minute or were unwilling to divert staff time to box the records NARA did much of the boxing of the records in the White House complex.

As materials were packed and palletized in the OEOB, they were inventoried, pre-printed box labels were applied and the pallets were staged for shipment in EOB Room 400 and in the hallways. Staging areas were inadequate, however materials were not allowed to remain long in the hallways before they were loaded and moved to Andrews. Collection and documenting of materials was carried out by 10-15 NARA staff members detailed to the project and the ORM staff. The labor of moving materials and wrapping pallets was carried out by a team of 10 Army enlisted men from local Army bases. Loading the trucks was the responsibility of NAVL, who provided a driver, a forklift operator, and a helper during all loading operations.

Beginning several days prior to each flight from Andrews, materials for that flight were moved to Hangar 2 as each truck was loaded. 28-foot trailers were used from the Archives building. 48-foot trailers were used from the Pickett Street facility and from the White House. Escort for classified materials from Pickett Street was provided by Virginia State Police, Prince Georges County Police, and the FPS. Escort from the Archives and the White House was provided, for the most part, by FPS, supplemented by units from the U. S. Park Police when FPS was unable to provide escort because of workload associated with the inauguration.

Three flights of materials departed in January and one in March on the following dates:

January 5. 66 pallets of classified materials from Pickett Street. 138 pallets of Oversize attachments from NARA storage.

January 9. 184 pallets, half Oversize Attachments from NARA storage and half White House Central Files, Subject File.

January 12. Flight was first postponed, then cancelled because not enough material was packed to fill a plane and new estimates showed that material remaining in the White House could be carried on one aircraft.

January 20. Remaining materials from the White House. 196 pallets, half from White House Central Files, half from White House Staff Offices.

March 16. 60 pallets of miscellaneous and late-arriving materials were shipped by C-141.

The January flights were accompanied by 3 NARA escorts and 1 or 2 members of the Operations Cell. The third member of the operations cell had gone ahead to Norton

AFB to make all arrangements for the off-loading operations, base security, and accommodations on base for the night of arrival.

All flights were scheduled to leave Andrews at 0900. Two flights were delayed, one by mechanical problems necessitating a landing at Dover AFB, and one because the order prohibiting space available passengers had not been received by Andrews AFB, necessitating the disembarking of unauthorized passengers. The flights landed at Norton at 1400 PST. Aircraft were immediately downloaded into waiting NAVL trailers which were secured and moved to a staging area to await departure. Loading was generally finished by 1700 PST. NARA and Operations Cell couriers then retired to BOQ accommodations for rest before the 0200 departure of the convoy for the West Los Angeles (WLA) facility. By 0130 all parties were assembled for the start of the 6 truck convoy. The Security escort consisted of 2 NARA cars, 8 FPS cars, 2 CHP cars, an Army car, and an NAVL escort car. Rental cars were given "Kojak" lights to identify them as members of the convoy. Each of the convoys was uneventful. The smaller transfer in March consisted of only two trucks and did not require a police escort but included one NARA and one Operations Cell escort.

The convoys arrived at the WLA facility at approximately 0400 and NAVL employees began unloading immediately under the direction of NARA personnel. At 0500 a crew of 20 Navy seamen from the Battleship New Jersey (Long Beach) arrived and began to shelf materials in locations designated by box labels. Shelving was generally finished by 0900.

Note on Archival Control of Records

Records were controlled throughout the shipment process by means of inventories of containers during all stages of transport. As materials were boxed in the White House staff offices or in the White House Office of Records Management, contents were noted on the boxes. The boxes were identified either by contents as they were already documented in the ORM automated system or they were given Oversize Attachment (OA) numbers which related to descriptions which were then entered into the ORM automated system. The materials stored in Warrenton were already identified in the NSC record keeping system. The materials stored in the National Archives building had already been assigned OA numbers, and the descriptions entered in the ORM system, at the time they were transferred to NARA. Thus, basic level of description and archival control was the box level. Records entered in ORM's OA system were described only by OA number. Records collected from staff offices were given a short description by archivists collecting the materials. It was important that describing archivists use standard descriptive terms for the resulting data base to be useful.

At the time the boxes were transferred to pallets for shipment, each box was labeled with a preprinted adhesive label. Each label included a unique serial number, which would henceforth identify the box, and a pre-assigned shelf location at the destination. As pallets were completed, archivists created pallet inventories which listed each serial number and the associated description of each box on the pallet. The pallet inventories were entered into an automated database which allowed searches of box descriptions, which would yield the serial number and thus, the pallet number during transit or the final location at the destination.

During shipment, the pallet was the unit of control. Pallets containing materials from Warrenton were given a number with an "5" prefix. Materials from the Archives Building

were given an "N" prefix for gift materials, an "A" prefix for OA materials, or an "M" prefix for miscellaneous materials. Materials from the White House Complex were given an "M" prefix for miscellaneous, an "A" for OA materials, a "D" prefix for materials from Central Files filing equipment, and a "V" prefix for security classified materials. Mutually exclusive series of numbers were assigned to each location so as not to duplicate numbers of pallets assigned the same prefix.

As pallets were loaded at points of origin, truck inventories were created. As the shipping pallets were moved from trucks to air pallets at Andrews AFB, air pallet inventories were created. The Military Airlift Command created aircraft manifests which listed air pallets on each flight. Air pallets were unloaded at Norton AFB, broken down in the freight terminal and shipping pallets were loaded on trucks. Truck inventories of shipping pallet numbers were created as each truck was loaded. Thus, at any point during shipment, any single box could be located through relationships within the hierarchy of containers. Also, truck unloading sequence at the destination could be preplanned. As each flight of materials departed Andrews AFB, the automated file on its contents was transmitted to a computer on the West Coast to allow preplanning for reception of materials.

Note on Security

Security planning for the transfer of Presidential records consisted of assuring that secure facilities were readied to accept the materials and that proper security measures were taken while the materials were in transit.

Modification of storage areas was designed by the National Archives Systems Management Division Director and was carried out by private contractors at the West Los Angeles facility and by GSA at the Laguna Niguel facility. Vaults and perimeter security followed specifications set forth in Manual for *Physical Security Standards for Sensitive Compartmented Information Facilities (SCIFs)*, Supp. to Director of Central Intelligence Directive (DCID) 1/21.

Coordination of security measures to be taken in transit was the responsibility of the Office of Presidential Libraries, with responsibility for specific areas under the direction of the following parties:

Military base security: DOD coordinator and OperationsCell.

NARA security & liaison with law enforcement agencies: NARA Security and Safety Officer.

White House complex security: NARA and Office of Records Management in coordination with the Secret Service Uniformed Division.

Presidential materials in transit were accompanied by armed guards and escorted by Government personnel with security clearances appropriate for the materials being transported. General security procedures may be illustrated by the following description of the movement of materials from the White House complex to the West Los Angeles Facility.

Within the White House complex all security is the province of the Secret Service. All NARA, military, and contract personnel involved in the move were previously cleared into the complex. The Secret Service Uniformed Division provided officers to patrol materials on pallets staged in the hallways of the Old Executive Office Building. Uniformed Division guards also provided security during the loading of trucks in West

Executive Avenue. After the trucks were loaded, they were sealed and padlocked and departed through the Northwest Gate onto Pennsylvania Avenue. At the gate, the Federal Protective Service assumed escort duty. The FPS provided two patrol cars and four officers to escort each truck to Andrews AFB. NARA personnel alerted Andrews base security, which met the trucks at the Andrews main gate and escorted the trucks and FPS to Hangar 2. At Hangar 2, FPS relinquished responsibility for the materials to the Air Force, which provided 24-hour armed guards while materials were on Base.

The Hangar 2 work areas, where materials were unloaded from trucks and placed on air pallets, were cordoned off and only personnel authorized by NARA as involved in the operation were allowed within the restricted area. NARA issued special identification badges to each individual involved. The badges were to be worn at all times in the work area. This rule was enforced by Air Police guards.

The same restrictions were in force at Norton AFB, where NARA also issued identification badges. Air Force security also patrolled the freight terminal work area and provided 24 hour guards for the truck staging area, where loaded, secured trucks were parked awaiting formation and departure of the convoy to the West Los Angeles facility. The Federal Protective Service provided the security escort from Norton AFB to destination jointly with the California Highway Patrol. The six-truck convoy departed Norton AFB at 0200 escorted by 8 FPS cars, 2 CHP cars, CHP motorcycles, 2 NARA cars and one Army car. The Air Force relinquished responsibility at the gate. At the destination FPS officers remained to provide security until all materials were unloaded and the facility was secured.

A NOTE ON ORGANIZATION

Planning, supervision, and funding of the transfer of the Reagan records was the responsibility of NARA's Office of Presidential Libraries (NL). However, although NL coordinated the major outlines of the transfer centrally, it was important that individuals with independent decisionmaking authority were placed in charge at each location and in each activity and that these individuals could work well with non-NARA organizations involved. Prior to the start of the operation, many planning meetings were held among the principals to work out details and allocate responsibilities:

The following individuals were given the major responsibilities:

Overall planning and coordination: David Van Tassel, NARA Office of Presidential Libraries.

Space and automation planning and implementation: Stephen Hannestad, NARA Office of Management and Administration.

Security, Labor, and Supplies: Lawrence Oberg, NARA, Administrative Services Division.

NARA White House Operations: James Hastings, NARA, Office of Presidential Libraries.

White House Records Operations: Terry Good, Lee Johnson, White House Office of Records Management.

Overall DOD mission coordinator: Maj. Lee N. McMichael, U.S. Army.

Army Operations Cell Commander: Maj. Steven Remley, U.S Army.

Transport planning and contracting: John Alexander, Military Traffic Movement Command, DOD.

Records movement, National Archives Bldg.: Douglas Thurman, NARA, Office of Presidential Libraries.

Records reception, West Coast: Richard Soubers, Clarence Henley, NARA, Office of Presidential Libraries.

Resident West Coast liaison: Sharon Roadway, NARA, Office of Federal Records Centers.

Prior to the above individuals taking up their operational responsibilities, the major decisions on the timing of the transfer and the method of transport were made in consultations between the following individuals.

Don Wilson, Archivist of the United States.

D.O. Cooke, Director of Administration and Management, Department of Defense.

Claudine Weiher, Deputy Archivist of the United States.

Fred Ryan, White House Office of Presidential Appointments and Scheduling and Director Designate, Former President's Office.

John Fawcett, Assistant Archivist for Presidential Libraries.

A full list of contacts is appended.

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Richard R. Soubers, Office of Presidential Libraries
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Laguna Niguel:

Sharon Roadway FTS 796-4220, (714) 643-4220

Guard Office, Reagan Space: FTS 796-4697, (714) 643-4697

West Los Angeles Facility: FTS 983-2125, (213) 215-2125, 2158 (Guard)

White House Office of Records Management

Terry Good, 456-2240

Lee Johnson, 456-2240

**DEPARTMENT OF THE TREASURY
UNITED STATES SECRET SERVICE**

May 17, 1989

WILLIAM PARR
Assistant Special Agent in Charge

I am very pleased to provide your team with my observations and problems associated with the out-going transition of Ronald Reagan. However, due to the uniqueness of each former president's selection of a residence, (i.e. type, grounds, locale, etc.); the sensitivity of the subject matter; and the eventual classification of any project of this nature from the Secret Service's standpoint, I'll refrain from commenting on the technical aspects.

To begin with, my specific role in this particular transition began in August, 1987, while I was still assigned in Washington, D.C. My initial responsibility was to coordinate the surveys of our Technical Security Division, Administrative Division, and GSA interaction and further to organize these different entities into a single project. I was the center or focal point for all questions and answers so as to prevent duplication of effort. This initial phase of the project was best handled from Washington, D.C.

Once all the data was collected from the different entities within the Secret Service, it was collated and coordinated with GSA and eventually put out for bids to companies in the private sector. This was an extremely time consuming process because of the classified nature of the project, i.e. waiting for bids to be returned from companies that specialized in this type of work.

Because of the length of time involved in conducting site surveys, drawing of plans, putting the project out for bid, letting of the contract, and the actual construction, it is of paramount concern to the Secret Service that the selection of a particular residence and office space be made at the earliest possible moment so that the facilities will be ready for occupancy on time.

At the time the project went out for bids by GSA, I was transferred to the Los Angeles area and was physically in place by June, 1988, in order to oversee the construction phase.

A unique problem encountered on this project was the presence of two separate contractors on site at the same time. One contractor was hired by the owners to recondition the residence and the other was hired by the U.S. Government to install the Command Post and security systems. I was informed by numerous members of the construction industry that this is usually avoided if at all possible. In this case, it was unavoidable because of the due date for completion and the amount of work to be done.

Most of my problems centered around the installation of the security systems without ruining the esthetics and insuring a timely completion of the project. All of these problems are not out of the ordinary in the construction industry because of certain

on-site problems that are both unforeseeable and unavoidable. The important point is to have a representative on site that can answer questions and solve problems when they arise.

RECOMMENDATION

The strongest recommendation I can make concerning a future on-going transition is a timely decision on selection and written designation of a primary residence and office space. Only after these locations have been officially designated and permission given to the Secret Service for construction can the actual work begin.

A suggestion that goes hand-in-hand with the preceding is the naming of a transition spokesman as soon as possible to work closely with the Secret Service. Both the Secret Service and the transition team have a single goal and that is to ensure that a residence and office space are available for the outgoing President when it is needed. It would be to everyone's advantage if this representative could be located "on-site" which would enable a close coordination of efforts and speed up the solving of any questions and problems.

I wish I could have gone into more detail in the preceding, but most of the problems I encountered in this project were contractor related. At the risk of sounding redundant, I feel the most important factor involved in a transition is the communicating of ideas and possibilities at the earliest possible moment.

**General Services Administration, Region 9
525 Market Street
San Francisco, CA 94105**

March 14, 1989

ROSS A. BIATEK
Deputy Regional Administrator

I wish to offer the following comments, on Region 9's efforts regarding the outgoing transition of President Reagan.

1. My specific role in the transition is to coordinate all services provided by GSA to establish the former President's office. These services include space, telecommunications, furniture, equipment, and supplies. Other administrative functions under my jurisdiction, which will be provided to the former President's staff after the transition period, are personnel, budget, and financial services.

Because of my past experience with the offices of Presidents Nixon and Ford, I approve or reject unique or unusual services that may be requested.

My role also includes overseeing that the related space requirements for the Secret Service are provided timely.

In addition, I serve as the liaison with our Washington office officials, who determine matters of policy.

2. Normally GSA cannot prepare for establishing an office prior to the Presidential election in November. Because President Reagan served two full terms, GSA knew, of course, that an office would someday be provided for him. Nevertheless, until an office location was specifically designated, the Regional Office could do very little actual work. Preliminary contacts were made with the White House staff in January 1988 to discuss transition matters. Official designation of the office space was made by President Reagan on August 12, 1988, and development of a lease began about that time. Procurement of furniture and equipment began in October 1988, when the transition funds were appropriated by Congress.

3. Seven regional people with varying degrees of responsibility were involved in setting up President Reagan's office.

4. Since the President could not be re-elected, this was one of the easier offices to set up because there was more time to plan. Usually there is a crash project after the November election. Also, by designating one person early on, i.e. Fred Ryan, as the White House contact, the Region was able to respond more effectively.

RECOMMENDATION

The major recommendation that has been made by both GSA and the General Accounting Office in the past is that, for the outgoing President, the Former Presidents Act and the Transition Act provisions be combined into one law. This would eliminate changing the rules of the game after July 20 (six months after the President leaves office).

General Services Administration

Washington, DC 20405

May 19, 1989

RAYMOND A. FONTAINE

Comptroller

I am happy to provide you with this report concerning our role in establishing and supporting the transition of former President Reagan. Since you also requested that Ross Biatek provide the same information from his prospective in Region 9 and since his response thoroughly covered Region 9's responsibilities regarding the outgoing transition of President Reagan we will limit our comments to matters applicable to the Central Office of GSA.

In response to your observations concerning the lack of guidelines, briefing books or reports left by previous Administrations which could be used to facilitate the transition activities of an outgoing Administration, we have compiled an administrative manual which we believe will be of assistance to future outgoing transitions.

My specific role in the outgoing transition is to (1) submit a budget request to the Congress which provides funding for transition activities and necessary funding under the Former-Presidents Act of August 25, 1958, as amended (3 U.S.C. 102 note); and (2) to authorize the obligation and expenditure of funds to carry out the provisions of Section 4 of the Presidential Transition Act of 1963, as amended (3 U.S.C. 102 note), at the request of the persons designated to represent the former President and the former Vice President in these matters, in order to provide necessary services and facilities for use in connection with winding up the affairs of the respective offices of the outgoing Administration. The carrying out of this function requires the signing on behalf of GSA the Memorandum of Understanding between the General Services Administration and the Office of The Former President and serving as a liaison with duly designated officials of the former President and the former Vice President in carrying out these functions.

Preliminary contacts were made with the White House staff in January, 1988 to discuss transition matters. The appropriate budget submissions were prepared in July, 1987 and submitted to the Office of Management and Budget September 1, 1987, and to Congress in January, 1988.

In the Central Office I was the primary person involved; while routine administrative and technical support was provided by existing staff as a part of their ongoing activities.

No major problems were encountered during the planning or execution of the Reagan Transition.

RECOMMENDATION

I agree with the recommendation made by Ross Biatek which is supported by both GSA and the General Accounting Office that, for the outgoing President, the Former

Presidents Act and the Transition Act provisions should be combined into one law. This would facilitate the orderly budgeting, funding and provision of support services to the outgoing administration as a function of our ongoing operations without the necessity of establishing special financial and administrative relationships which are limited to a seven month time frame.