

Originally Processed With FOIA(s):
2016-2628-F

FOIA Number:
2016-2628-F

FOIA MARKER

This is not a textual record. This is used as an administrative marker by the George Bush Presidential Library Staff.

Record Group/Collection: George H.W. Bush Presidential Records
Collection/Office of Origin: Chief of Staff, White House Office of
Series: Winklejohn, Katie, Files
Subseries:

OA/ID Number: 00834
Folder ID Number: 00834-009

Folder Title:
Chief of Staff-Designate Transition Files 11/88-1/89: White House / Staff Organization

Stack:	Row:	Section:	Shelf:	Position:
G	15	26	2	

Withdrawal/Redaction Sheet (George Bush Library)

Doc. No. / Type	Subject/Title	Date	Restriction	Classification
01. Resume	Re: Ken Yale, DDS [FOIA Exemptions Redacted] (1 pp.)	n.d.	(b)(6)	
02. Form	Re: White House Office Supplemental Information Sheet - Jacqueline Kennedy [FOIA Exemptions Redacted] (1 pp.)	12/28/88	(b)(6)	
03. Form	Re: White House Office Supplemental Information Sheet - Katherine Winklejohn [FOIA Exemptions Redacted] (1 pp.)	12/28/88	(b)(6)	

Page 1 of 1

Collection:

Record Group: Bush Presidential Records

Office: Chief of Staff, Office of the

Series: Winklejohn, Katie, Files

Subseries:

WHORM Cat.:

File Location: Chief of Staff-Designate Transition Files 11/88-1/89: White House/Staff Organization

Pinksheet Number: ES558

OA/ID Number: 00834-009

Date Closed: 10/21/2016

FOIA/Sys Case #: 2016-2628-F

Re-review Case #:

P-2/P-5 Review Case #:

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Appeal Case #:

Re-review Case #:

Appeal Disposition:

P-2/P-5 Review Case #:

Disposition Date:

AR Case #:

MR Case #:

AR Disposition:

MR Disposition:

AR Disposition Date:

MR Disposition Date:

RESTRICTION CODES

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

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

P-1 National Security Classified Information [(a)(1) of the PRA]

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

Cabinet Affair

KEN YALE D.D.S., J.D.
9921 Cherry Tree Lane
Silver Spring, Maryland 20901

Born:

(b)(6)

JOB OBJECTIVE: Management or policy position that would use my leadership, problem solving and communication skills.

EXPERIENCE

- 1988 **Campaign Staff, Bush/Quayle National Headquarters**
● Completed special projects for policy and research departments.
● Health policy advisor.
● Researched and wrote position papers and daily briefing drafts for the Presidential candidate.
● Established liaison with Congressional offices.
● Wrote memoranda on current legislation in Congress.
● Advance work.
- 1987-
present **Legislative Counsel, U.S. Senate, Senator Al Simpson, Assistant Republican Leader**
● Health Care, Medicare/Medicaid, Health Finance Issues.
● Committee Staff, Aging Committee.
● Steering Committee Member, Senate Rural Health Caucus.
● Coordinator, Medicare Study Group.
● Develop policy and legislation, speechwriting.
- 1985-
1987 **Legislative Representative, American Dental Association Washington, D.C.**
● Health care lobbying.
● Supervised writing and edited a monthly publication.
● Strategic planning and negotiating with federal agency officials, Members of Congress and staff.
● Researched issues, developed policy, position statements and legislative language.
● Directed a government affairs conference.
● Monitored and evaluated legislation and regulations.
- 1984-
1985 **Instructor, Georgetown University School of Dentistry, Washington, D.C.**
● Taught didactic and clinical courses.
● Supervised a large clinical setting.
- 1984-
1985 **Consultant, Riggs National Bank, Washington, D.C.**
● Advised bank on health care and business concerns of health care providers.
● Developed educational materials.
- 1981-
1984 **Commissioned Officer, U.S. Public Health Service, Kansas City, Missouri.**
● Administrative, supervisory and clinical duties.
● Coordinated staff continuing education program.
● Member, Quality Assurance Committee.
● Financial Analyst, Medical Practice Valuation Group.

EDUCATION

- J.D. -- 1988, Georgetown University Law Center.
- National LSAT exam, top 99th percentile.
 - Business and Corporate Finance Law.
 - Dean's List
 - Negotiation Competition Finalist.
- C.F.P. -- 1984, University of Missouri at Kansas City.
- D.D.S. -- 1981, University of Maryland.
- National DAT exam, top 90th percentile.
 - Dean's List.
 - Who's Who in American Universities Award.
 - Officer, Student Dental Association.
- B.A. -- 1978, Creighton University, Nebraska.
- Dean's List.
 - Officer, Student Government.

MEMBERSHIP (current and past):

American Bar Association
Virginia State Bar
District of Columbia Bar (Pending)
American Dental Association
Institute of Certified Financial Planners
Psi-Omega Fraternity
Advocate, American Medical Student Association
Delegate, American Association of Dental Schools
Committee on Health Manpower in Maryland
Officer, Maryland Student Dental Association

PERSONAL INTERESTS: Public Speaking, Racketball.

REFERENCES:

Senator Al Simpson, 261 Dirksen Senate Office Building,
Washington, D.C. 20510.

Mr. Robert Zoellick, 4517 Brandywine Street, N.W.,
Washington, D.C. 20016.

Ms. Deborah L. Steelman, 1140 19th Street, N.W., Washington,
D.C. 20036.

ALAN K. SIMPSON
WYOMING

ASSISTANT REPUBLICAN
LEADER

Cab Affairs

VETERANS' AFFAIRS COMMITTEE

JUDICIARY COMMITTEE
RANKING MINORITY—SUBCOMMITTEE ON
IMMIGRATION AND REFUGEE POLICY

ENVIRONMENT AND PUBLIC WORKS COMMITTEE
RANKING MINORITY—SUBCOMMITTEE ON
NUCLEAR REGULATION

United States Senate

WASHINGTON, DC 20510

December 29, 1988

Honorable George Bush
The President-Elect
The White House
Washington, D.C. 20500

Dear George:

It is my great pleasure to contact you to express my full support for Ken Yale, who is under active consideration for the position of Special Assistant to the President and Executive Secretary of the Domestic Policy Council.

I have come to know Ken so very well as one of my most able and talented legislative assistants, and now currently as legislative counsel, he having recently passed the bar. He has a unique combination of talents and a firm grasp on domestic policy nuances. In addition to a legal background, he has a doctorate degree and a keen writing ability.

Ken has expanded his position in order to serve me in a variety of capacities and I know his great energy, brightness, and enthusiasm will serve you well. I can personally attest to his excellent abilities. He consistently produces quality work and I believe he would be a real asset to your team in the White House.

I selfishly know that I will be losing a very thoughtful and articulate assistant. Nevertheless, I assure you honestly that he has the necessary skills and qualifications to be of great service to you and I offer my unqualified support for Ken.

Please do give Ken your every earnest consideration. If I may discuss this with you personally, I would be most pleased to do so.

With kind regards and respects,

Most sincerely,



Alan K. Simpson
United States Senator

AKS/bb

ALAN K. SIMPSON
WYOMING

ASSISTANT REPUBLICAN
LEADER

VETERANS' AFFAIRS COMMITTEE

JUDICIARY COMMITTEE
RANKING MINORITY—SUBCOMMITTEE ON
IMMIGRATION AND REFUGEE POLICY

ENVIRONMENT AND PUBLIC WORKS COMMITTEE
RANKING MINORITY—SUBCOMMITTEE ON
NUCLEAR REGULATION

United States Senate

WASHINGTON, DC 20510

December 30, 1988

Governor John H. Sununu
Chief of Staff Designate
Office of the President-Elect
1825 Connecticut Avenue, N.W., Suite 1016
Washington, D.C. 20270

Dear John:

It is with great satisfaction and personal pleasure that I introduce to you Ken Yale, who is under consideration for the position of Special Assistant to the President and Executive Secretary for the Domestic Policy Council.

I have known and worked closely with Ken for the past two years. He has proved to be a most able and talented assistant. I have greatly appreciated his work on a full range of domestic policy issues. Ken has the rare talent of being able to analyze and communicate domestic policy issues and politics, both verbally and in writing. He has consistently produced quality work for me.

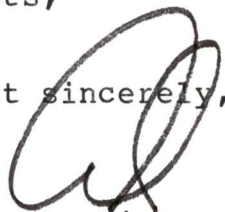
As a member of the Senate Rural Health Caucus steering committee, Ken has shown not only his unique problem solving approach to issues, but also his fine leadership capabilities. The Catastrophic health care program is another instance in which Ken "jumped in with both feet" to analyze the various proposals and to advise me on the possible ways to proceed.

These, and other issues are very complex and difficult to understand. Yet, Ken has always shown the persistence and capacity to evaluate proposals and develop concise options for me to consider on issues of national policy. This talent has extended to many domestic issues currently of great importance to our Nation, such as Welfare Reform, the Savings and Loan crisis, AIDS, Social Security, and many others.

I personally know that Ken has all of the necessary skills and qualifications to be of great service to you. Although I will greatly miss his fine work, I do earnestly offer my unqualified support for Ken.

With kind regards and respects,

Most sincerely,



Alan K. Simpson
United States Senator

AKS/bb

File W.H. Org.

Document Originally
Attached to
Following Page

THE WHITE HOUSE

WASHINGTON

December 2, 1988

MEMORANDUM FOR JOHN SUNUNU

FROM: ROBERT W. SWEENEY JR.

SUBJECT: Domestic Policy Development

Since 1985, I have been a staff member of the White House Domestic Policy Council. During this period, Chief of Staff, Don Regan, consolidated the Cabinet Council system from nine councils to two -- the Domestic and Economic Policy Councils. I have made some observations about how well the process has worked and have some recommendations to suggest regarding how it could be strengthened.

A brief review of Presidential decision-making may be helpful in understanding the current process. Therefore, I have attached several diagrams that describe the Nixon, Carter, early Reagan, and current Reagan White House policy processes. They are self-explanatory (see Attachment A). In addition, I have included a proposal which describes how the Bush policy process could be organized, domestic issues identified, and decision memoranda presented for Presidential approval, immediately following the inauguration (see Attachment B).

There are many ongoing domestic issues that the new administration will face, and others that the President-elect will want to emphasize. However, the process for identification, approval, and implementation of policy options is critical to the success of any Presidency.

I believe "Managed Multiple Advocacy" offers an opportunity for the Bush Administration to build on the Reagan successes and provide direction for domestic policy that will set a new and higher standard of White House leadership (see Attachment C).

One specific idea that the President-elect may wish to consider is to designate the Vice President as Vice Chairman of both the Domestic and Economic Policy Councils. This would be a substantive job, and with his position as President of the Senate, would be a powerful way to move Administration legislative proposals through the Congress.

The Domestic Policy Issues Book (see Attachment D) has been submitted to the transition team, but the process described in this memorandum is my own. I hope you will find it useful. As you know, I am available to discuss these issues in more detail, if you so desire.

You will do a superb job as Chief of Staff. Congratulations!

OFFICE OF THE PRESIDENT-ELECT
WASHINGTON, D.C. 20270

November 28, 1988

MEMORANDUM FOR GOVERNOR JOHN SUNUNU

FROM: Jim Cicconi *jc*
SUBJECT: White House Organization

With apologies for the haste with which this paper has been written, I would offer the following thoughts on the organization of the White House staff, along with personal views on the responsibilities we discussed:

Overall Organization

While the various offices of the White House can be organized largely as one wishes, the specific functions are constant regardless of hierarchy. The major functions are :

chief of staff	press
national security	Presidential personnel
domestic policy	counsel
legislative	political
Cabinet	public liaison
staff secretariat	intergovernmental
speech-writing	advance
administration	research/public affairs
scheduling	local/regional media

The above functions have been organized in different ways previously, and there is no particular magic about one method over another. Without going into inordinate detail, however, there are some combinations that have worked better or worse without regard to the people in the jobs:

- o Cabinet Affairs and Policy Development have quite different functions, which makes combining the two difficult. The former is more a staffing function to the cabinet councils and consists of issues more ripe for a decision; the latter is mostly long-range and analytical. Policy Development at its best is classic problem solving and analysis; Cabinet Affairs services a decision-making process for the ideas thus developed.
- o The political office, while combined with other offices in the past (such as intergovernmental), should probably stand alone in 1989. The main reason for this is focus on the reelection effort, which must begin immediately; a combination with other offices will dilute and distract from the political "service" effort that is essential.

- o While speech-writing has often been combined with research, public affairs and media liaison into a Communications Office, this is not necessarily the way it must be. Speech-writing has been split off in the past (after Dave Gergen left it was given to Dick Darman) without harm to its mission. One thing to avoid, though, is combining any of the above functions with the press office where they would be effectively submerged in the daunting day-to-day business of that operation.
- o Proposals to combine public liaison and intergovernmental have been made in the past, but are not particularly compelling. If there are strong people for both jobs, it is better to keep them separate since their functions (beyond the term "liaison") are quite distinct. If less experienced people head these offices, they could report to an Assistant to the President who would have few functional reasons to meddle in their operations.
- o The White House Administration Office has, for the bulk of the Reagan-Bush years, reported to the Assistant to the President in charge of the staff secretariat. The rationale for this has been twofold. First, the head of Administration has generally not been an Assistant to the President, and it was felt the arrangement ensured senior staff oversight as well as a guarantee that major problems could be raised quickly to the top. The second reason relates to the chief of staff's workload-- since he has little time for administrative matters, preference has been to delegate such oversight to a top aide while keeping some control through that person. The Assistant to the President in charge of the staff secretariat has always been someone close to the chief of staff, yet someone without a competing bureaucracy; hence the delegation to that office.

Personal Views

Based on your description of the need to keep track of all policy issues, and thus decisions, within the White House, and to manage this flow, it is essential that you have a well-organized staff secretariat headed by someone in whom you have personal trust and confidence. This office, as you know, not only controls all paper flow to and from the President, but also handles the flow of information within the staff. Since this is the easiest position in the White House from which to play games, the position has traditionally been considered part of the Chief of Staff's office, and its head to have the same type of direct access and relationship with the chief of staff as his executive assistant and other top aides.

The job has nearly always carried with it the top rank accorded senior White House aides-- since 1981 it has been Assistant to the President-- and my hope would be that the decision will be the same next year. My preference would be Assistant to the President and Deputy to the Chief of Staff because I feel it important that the position's relationship to the chief of staff's office be clear. This title has been used by the staff secretary in the past, though the term "Deputy to the Chief of Staff" is not unique and could also be held by others concurrently (in 1981-82 and later the title was held by both the staff secretary and the executive assistant to the chief of staff).

Another reason this designation is preferable relates to the role the office can play within the White House. In its simplest form, the staff secretary's office merely routes paper. At its best, it can perform the functions you outlined of helping track, manage, and move to conclusion those issues which the White House initiates or with which it must deal. Performance of this broader function, under the Chief of Staff's direction, necessitates involvement in most of the significant meetings, ad hoc and otherwise, by which White House decisions are made (or options decided for presentation to the President). In most cases, the staff secretary would actually prepare for the chief of staff, and ultimately for the President, the decision memos resulting from such meetings (or direct their preparation by other offices). This is particularly true in the case of legislative strategy meetings or discussions.

There is another compelling reason why the position, whoever holds it, should be involved in most significant meetings and decisions: simply put, this position is the chief of staff's backstop against end-runs, recommendations not coordinated with the rest of the staff (or the agencies), and bad information reaching the President. To do the job right, the person holding it must know what is going on, including the chief of staff's and deputy chief of staff's thinking on particular issues. This responsibility alone may be sufficient entre into most significant West Wing group meetings; if the person holding the job also has the experience and knowledge to contribute beyond that (I feel I do), so much the better.

Finally, with regard to supervisory responsibilities beyond the staff secretariat (which is a very small office if staffed properly), there are sound arguments for not disturbing the current arrangement for the Office of Administration to report to the person holding this position. From the chief of staff's standpoint, I would argue that any alternative would cause difficulties. For the most part, OA runs itself with only light supervision required after the first six to nine months. (Keep in mind that one reason for this arrangement historically is the need for the chief of staff to keep some control over White House "perks" which OA oversees.)

In summary, I appreciate your invitation to put some thoughts on paper. The idea you have put to me is exciting and I hesitate to allow it to become bogged down in writing about esoterica related more to internal pecking order than to the challenges we face. Still, I have tried to respond with the frankness you asked for, including my hope that the position will allow for involvement not just in the process of decisions, but also in their rationale.

Whatever your ultimate decisions, I want you to know that I will do whatever I can, whether in public or private life, to assist you in ensuring that George Bush has every opportunity to be the great President we all know he can be.

Withdrawal/Redaction Sheet

(George Bush Library)

Document No. and Type	Subject/Title of Document	Date	Restriction	Class.
02. Form	Re: White House Office Supplemental Information Sheet - Jacqueline Kennedy [FOIA Exemptions Redacted] (1 pp.)	12/28/88	(b)(6)	

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

PRM. Removed as a personal record misfile.

**THE WHITE HOUSE OFFICE
SUPPLEMENTAL INFORMATION SHEET
FOR PERSONNEL ACTION
(TO BE ATTACHED TO FORM WHP-1)**

December 28, 1988

Date

PERSONAL INFORMATION	Name (Ms., Miss, Mrs., Mr.) <u>Jacqueline A. Kennedy</u>		(b)(6)	
	Local Address <u>R.R. 2, Box 207</u> <u>Concord, New Hampshire 03301</u>			
	Last Perm. Address _____			
	Tel. No. <u>(603) 271-2121</u> Office _____ Emergency _____ Name _____ Tel. No. _____			
ASSIGNMENT	Marital Status: ☐ Single ☒ Married ☐ Widowed ☐ Separated ☐ Divorced			
	Name of Spouse <u>Stephan Manning Kennedy</u>			
	Typing _____ Shorthand _____			
	Office of <u>Chief of Staff (designate)</u>			
PRIOR EMPLOYMENT DATA	Reporting to <u>John H. Sununu</u> Ext. <u>X2164</u> Room <u>197</u>			
	Status: ☐ White House Employee ☐ Detailee ☐ Volunteer ☐ SBA (Contact)			
	☐ Other _____			
	Desired Effective Date <u>12/29/88</u> Ending Date _____			
ACCESS/ PASS	Military Service: ☒ No ☐ Yes Branch _____ Date of Service _____			
	Prior Federal Govt. Service as Civilian: ☐ No ☐ Yes Ending Date _____			
	Current or Last Place of Govt. Service or Civilian Employment: <u>Office of the Governor</u> <u>State House, Concord, NH</u> (603) 271-2121 Address _____ Tel. No. _____			
	Personnel Contact in Current/Last Govt. Agency <u>Deann Cole</u> (603) 271-2121 Name _____ Tel. No. _____			
VOLUNTEERS	Prior W. H. Service: ☒ None ☐ Employee ☐ Volunteer ☐ SBA _____			
	TO BE COMPLETED BY REQUESTING OFFICIAL			
	☐ WH Access List ☒ WH Pass _____ Signature of Requesting Official _____			
	☐ EOB Access List ☐ EOB Pass _____ Signature of Approving Official _____ ☐ Volunteer Pass _____			
VOLUNTEERS	TO BE COMPLETED BY VOLUNTEER			
	<i>I acknowledge that the personnel data above is correct and that I am volunteering my services without compensation or promise of such.</i>			
	_____ Signature of Volunteer _____ Date _____			
	_____ Date _____			

FOR USE BY WHITE HOUSE PERSONNEL OFFICE ONLY:

WHP-2(8/87)

Preliminary copy to Security _____
Date _____Approved copy to Security _____
Date _____

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AR Disposition:	MR Disposition:
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**THE WHITE HOUSE OFFICE
SUPPLEMENTAL INFORMATION SHEET
FOR PERSONNEL ACTION
(TO BE ATTACHED TO FORM WHP-1)**

December 28, 1988

Date

PERSONAL INFORMATION	Name (Ms., Miss, Mrs., Mr.)	Katherine M. Winkeljohn			(b)(6)
	Local Address	8003 Custer Road			
		Bethesda, Maryland 20814			
	Last Perm. Address	2308 S. Joyce Street			
		Arlington, VA 22202			
	Tel. No.	(301) 907-9495	(202) 673-2636	Emergency	Mary M. McGeein (202) 342-7300
	Marital Status:	☒ Single	☐ Married	☐ Widowed	☐ Separated
Name of Spouse					
Typing	WPM		Shorthand	WPM	

ASSIGNMENT	Office of	Chief of Staff (designate)			
	Reporting to	John H. Sununu		Ext.	X2164
	Status:	☐ White House Employee	☐ Detailee	☐ Volunteer	Room 197
		☐ Other			
	Desired Effective Date	Ending Date			

PRIOR EMPLOYMENT DATA	Military Service:	☒ No	☐ Yes	Branch		Date of Service	
	Prior Federal Govt. Service as Civilian:	☐ No	☒ Yes	Ending Date	8/85		
	Current or Last Place of Govt. Service or Civilian Employment:	Ofc of President-elect					
		1825 Connecticut Ave, WDC 20270			(202) 673-2636		
		Address			Tel. No.		
	Personnel Contact in Current/Last Govt. Agency	Gina Sagredo			(202) 673-2448		
	Name			Tel. No.			
Prior W. H. Service:	☐ None	☒ Employee	☒ Volunteer	☐ SBA			

ACCESS/ PASS	TO BE COMPLETED BY REQUESTING OFFICIAL	
	☐ WH Access List	☒ WH Pass
	☐ EOB Access List	☐ EOB Pass
		☐ Volunteer Pass
	Signature of Requesting Official	
	Signature of Approving Official	

VOLUNTEERS	TO BE COMPLETED BY VOLUNTEER
	<i>I acknowledge that the personnel data above is correct and that I am volunteering my services without compensation or promise of such.</i>
	Signature of Volunteer _____ Date _____

FOR USE BY WHITE HOUSE PERSONNEL OFFICE ONLY:

WHP-2(8/87)

Preliminary copy to Security _____
DateApproved copy to Security _____
Date

OFFICE OF THE PRESIDENT-ELECT
WASHINGTON, D.C. 20270

9 December 1988

MEMORANDUM FOR GOVERNOR SUNUNU

FROM: Chase Untermeyer

SUBJECT: Office of Presidential Personnel

I. OFFICE STRUCTURE

- o Director
- o Deputy Director
- o Associate Directors (AD's)
 - National Security Affairs
 - Economic and Commercial Affairs
 - Social Services
 - Natural Resources
 - Regulatory & Legal Affairs
 - Boards & Commissions
- o Deputies to each Associate Director
- o Staff Assistants for:
 - Political Clearance
 - Training & Orientation
 - Legislative Affairs
- o Clerical/Administrative/Data Processing Support

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- o Commissions for Director/Deputy Director/6 AD's.
- o White House Mess memberships for the above. (My 9 November 1988 "Report to the President-Elect" recommends that Mess memberships and other "perks" be determined by a strict and consistent rank system. I stand by that recommendation. However, if there is no such policy, I strongly believe these eight Presidential Personnel staffers should have the above.)

III. PROCESS

- o The AD's work up recommendations for the PAS/PA positions within their areas and bring them to the Director. He then examines and discusses their findings, asks for more names, and interviews top prospect(s).
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o Presidential Personnel, in coordination with Cabinet Affairs, will organize "team-building" activities among all political appointees at all levels. The President and First Lady will be asked to invite appointees to White House events (including those for appointees alone), and senior White House staff/Cabinet officers will be asked to meet with appointees in special briefings.

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o Presidential Personnel, in conjunction with the Office of Personnel Management, will develop ways to promote better understanding of the President's programs among the career workforce, employing team-building efforts among both career and non-career senior officials.

Chase
9 Dec 88

OFFICE OF THE PRESIDENT-ELECT
WASHINGTON, D.C. 20270

OFFICE OF GOVERNOR JOHN SUNUNU

DATE: 12-9-88 REPLY/ACTION DUE: asap

FROM: Ed Rogers

SUBJECT: Legal / Administrative Issues
Related to Transition

	ACTION	FYI		ACTION	FYI
GOVERNOR SUNUNU	☐	☒	_____	☐	☐
ANDY CARD	☒	☐	_____	☐	☐
LINDA CASEY	☐	☐	_____	☐	☐
JACKIE KENNEDY	☐	☐	_____	☐	☐
TRACY LEE	☐	☐	_____	☐	☐
ED ROGERS	☐	☐	_____	☐	☐

COMMENTS: Andy has action to follow
up with Governor

FAX NUMBERS: New Hampshire (603) 271-2130
Washington (202) 745-7360

RETURN TO: _____
1825 Connecticut Ave, N.W.
Washington, D.C. 20270
(202) 673-2300

December 8, 1988

MEMORANDUM FOR GOVERNOR SUNUNU

FROM: MIKE FARREN *MF*

SUBJECT: Attached Memo

Per your request for a memo outlining the legal and administrative issues associated with the White House Transition, please find Boyden Gray's analysis attached.

When you have the opportunity to review the memo, I stand ready to discuss and offer any and all assistance.

cc: Andy Card
Ed Rogers

OFFICE OF THE PRESIDENT-ELECT
WASHINGTON, D.C. 20270

December 8, 1988

MEMORANDUM FOR GOVERNOR SUNUNU

FROM: C. Boyden Gray ^{CBG}_{by SM}
SUBJ: Transition of Future White House Staff Members

I understand that by January 5, 1989 you plan to have designated approximately 20-30 individuals to join you on the WH Staff. (I will refer to these individuals as your "designees".) I understand that prior to January 20th you would like your designees to spend time at the WH with the incumbents of the jobs they will assume. You have asked for guidance on the legal and administrative steps that should be taken to implement these arrangements.

On December 6 members of my staff met with WH lawyers to discuss these matters. We outlined two basic requirements:

1. The need to agree upon the ground rules for a pre-Inauguration phase-in period during which your designees will be spending substantial time at the White House.
2. The need to make arrangements to ensure that on Inauguration Day, the designees can immediately assume their official positions on the WH Staff.

We have had a number of exchanges with the WH lawyers since the December 6 meeting. Here is where things stand.

I. Pre-Inauguration Period

The WH has agreed that there will be a phase-in period prior to the Inauguration during which the designees will be given access to the WH complex as well as appropriate access to information, work space and phones. For purposes of discussion, we have proposed a two-week phase-in period from about January 5 to January 20, but the WH recognizes we may want to phase-in some designees before January 5.

The WH has proposed the following ground rules for the pre-Inauguration period:

1. Salaries: The WH lawyers insist that all designees must be Transition employees and that none can be put on the WH payroll prior to the Inauguration. While I do not believe the WH position is legally mandated, it is not an unreasonable position for them to take.

You should be aware that any designees who are receiving income from a private employer can be employed in the Transition as volunteers and may continue to receive their private income while working on the Transition (so long as there is no conflict of interest).

2. Physical Access: We advised the WH lawyers that, during the pre-Inauguration period, we would like the designees to have free physical access to the White House complex (including the West Wing). To accomplish this, we requested that, by January 5th (and perhaps earlier in some cases), the designees be issued the same "temporary badges" normally issued to newly-hired WH Staff. (Ordinarily, when a new WH Staff member is hired, he is issued a "temporary badge" pending completion of the FBI's full field investigation. This temporary badge gives the holder free access to the WH complex.)

The WH has agreed with this request and will establish a process to issue temporary badges to the designees upon receipt of (1) an expanded FBI "name check", and (2) completion of the WH Counsel's Personal Data Statement. This means that, once a designee has been identified, it should take only a few days to get the badge.

3. Access to Information: We have requested that, during the pre-Inauguration phase, designees be afforded the same access to information as newly-hired WH staff members. This means, as a practical matter, that the designees should be able to see whatever their incumbent counterparts see, except they would not have access to classified information until their full field investigation is completed.

The WH lawyers have agreed and stated that our informational needs can be met under existing WH guidelines for sharing information with Transition personnel. Thus, in response to a request from the Transition, President Reagan would direct his staff to share with designees whatever information is necessary to assist them in preparing to assume their respective duties.

The WH proposal should be satisfactory. We expect the vast majority of incumbent staff to be helpful and forthcoming. If it turns out that the designees are not getting the information they should, we may explore having OVP appoint the designees as dollar-a-year Special Government Employees who, as government employees, should have unquestioned access to non-classified government documents.

4. Space: The WH lawyers say they are "adamant" that the Transition pay for any space formally dedicated to Transition personnel, including space for individuals named as future WH Staff members. However, they feel the designees' space needs can be met on an "informal" basis. They propose we proceed under a

"Buddy System", whereby each designee makes informal arrangements to share space and phones with his incumbent counterpart. The idea is that each designee would have access to the office of his counterpart and would be welcome to "camp out" there as he learns the ropes.

We believe reimbursement for office space is not necessary as a matter of law. Moreover, it may cause problems for the transition with allocation of space to cabinet designees by the departments. (The WH lawyers have opined that such space, unlike WH space, may be provided without charge.) We are currently exploring whether GSA, under its statutory authority, will issue a general waiver of any requirement for office facility reimbursement. Nevertheless, since the buddy system should prove workable and your designees would also have transition office space available, we expect the WH proposal to prove workable in most instances.

II. Post Inauguration

The WH has agreed to put a process in place now so that designees can immediately assume their official jobs on Inauguration Day. This will require assembling the paperwork packages for each designee to complete as soon as they are selected. This will include the FBI forms, financial disclosure statements and WH personnel forms. As noted above, designees will be permitted to assume their positions pending completion of the FBI's full field investigation. Also, under recently implemented rules, all incoming employees to the Executive Office of the President will be required to submit to drug testing.

III. Need for Early Designee for Management/Administration

I recommend that you consider designating a management/administrative person as soon as possible to coordinate with the White House Office of Administration. There are a host of administrative issues that must be addressed now to avoid chaos on January 20, -- e.g. everything from space assignments, to phone lines, to badge colors. But the most important of these issues may be the allocation of the extra transition funds Congress specifically appropriated to the White House Office and its Office of Administration for the transition.

As you may know, Congress appropriated an extra \$650,000 in the White House Office budget and an extra \$250,000 in the White House Office of Administration budget to be used for transition purposes. (These funds are in addition to the \$3.5 appropriated for the Transition.) It was anticipated that as much as \$450,000 of the WHO money might be needed for lump sum leave payments to departing employees. However, those funds are also available for such transition-related expenses as office space reconfiguration, reprogramming for ADP systems, etc. The Office of Administration

funds are expected to be used for such expenses as extra overtime pay, reconfiguring phone systems, printing costs, ADP costs, etc.

These additional transition funds are available to both the Reagan Administration and the Bush Administration. Yet decisions on how this money is to be allocated are currently being made by the WH without your input. Prompt designation of a Bush WH management person could ensure that a fair portion of these funds is available for our use after January 20.

*21
WH Ops
Operations*

THE WHITE HOUSE
WASHINGTON

Briefing on Paperflow

OUTLINE

I. PURPOSE

Provide a general briefing that focuses on the way the White House paper flow system is currently managed. After discussing the resources available to manage the system, the overall principles applied in making the myriad decisions, the staff secretary's function will be reviewed. The discussion of paperflow will be preceded by very briefly touching on those other organizations that presently report to the Assistant to the President for Operations.

II. OVERVIEW

- A. White House Military Office •
- B. Office of Administration •
- C. White House Operations •
- D. White House Secretariat/Staff Secretary

III. PAPERFLOW

- A. Adaptation to a President's style
 - 1. system is flexible
 - 2. President can always handle paper outside the system if he chooses
 - 3. President chooses which material he sees ...
 - 4. President determines how much time he needs to review various materials and when he wants them ...
- B. Staff Secretary/White House Secretariat Organization
 - 1. Overall size of office
 - small enough to ensure thorough knowledge of status of materials by every person in office
 - 2. Executive Clerk
 - provides institutional memory of official Presidential actions
 - prepares and dispatches all official documents
 - 3. Presidential Correspondence
 - routinely answers thousands of letters daily
 - flags substantive letters and/or VIP letters
 - prepares proclamations, Presidential friends letters, Congressional courtesy letters, etc.
 - if Correspondence is doing its job, we see only a tiny percentage of mail

4. Records Management
 - provides, within moments, files from any staff on given subject
 - repository for all White House office records; offices must send everything to files in order to maintain a useful records system
 - ensures White House compliance with Presidential Records Act
- C. Principles of Paperflow
 1. assure appropriate Presidential involvement
 2. assure quality control, fairness, thoroughness
 3. assure early warning and timeliness
 4. assure fair participation by relevant parties
 5. encourage integration and consistency across issues
 6. assure authoritative recording of Presidential actions
 7. assure appropriate implementation of decisions
 8. allow monitoring of status of Presidential paper
- D. History of Staff Secretary
 1. Eisenhower created position in White House
 2. Kennedy and Johnson didn't have staff secretary
 3. Nixon -- Haldeman used junior people for position
 4. Ford -- similar to Nixon; part of COS staff
 5. Carter had chaotic paperflow system; junior staff secretary
 6. Reagan -- first-term staff secretary was Deputy Chief of Staff (Darman); second-term was close aide with immediate access to COS Regan (Chew)
- E. Universe of Presidential Paperwork
 1. Official documents (Tab A)
 2. Speeches/remarks
 3. Enrolled bills
 4. Daily schedule material
 - 5. NSC communications
 6. DPC/EPC decisions
 7. Personnel actions
 8. Press announcements (Presidential and Press Sec.) ✓
 9. Substantive correspondence

F. Office Requirements

1. Clout/Access to Chief of Staff
 - staff secretary must pull weight with staff in meeting deadlines and encouraging thoughtful input
 - should have complete backing of Chief of Staff in order to discourage end-runs
2. Authority over Speechwriting
 - suggest this office have administrative responsibility for Speechwriting office
3. Recommended skills/strengths
 - commitment to President's goals
 - familiarity with President's personal style and preferences for paperwork
 - command of detail in large volume
 - discretion with press, agencies, and outside world; handling of President's paperwork is very personal and should be closely held
 - ability to work well with all senior staff

? DEADLINE
CONTROL..
CIRCULATE

November 3, 1988

LIST OF TYPES OF RECURRING OFFICIAL DOCUMENTS AND PAPERS
THAT THE OFFICE OF THE EXECUTIVE CLERK IS RESPONSIBLE FOR
PROCESSING THAT ARE SUBMITTED TO THE PRESIDENT FOR ACTION

MESSAGES AND OTHER COMMUNICATIONS TO THE CONGRESS, including
special presidential messages, routine messages transmitting
reports required to be made by various government agencies,
and letters to the Speaker of the House and the President of
the Senate and chairmen of committees, and, occasionally, to
other members of the Congress

TREATIES:

Transmitted by message to the Senate for advice and consent
to ratification
Instrument of Ratification, by which the President ratifies
an approved treaty
Proclamation of the treaty, announcing its effectiveness

NOMINATIONS TO THE SENATE of many civilian officers of the
government, officers of the Armed Services, Foreign Service,
Coast Guard, National Oceanic and Atmospheric Administration,
and Public Health Service, which require Senate confirmation

WITHDRAWALS OF NOMINATIONS

APPOINTMENT DOCUMENTS:

Commissions and Certificates
Orders for Chairmanship, Vice Chairmanship, Acting head of
Executive agencies, and other designations
Letters:
of appointment;
to Ambassadors of credence, recall, and responsibility;
to representatives attending celebrations and
inaugurations in foreign countries; and
according the personal rank of Ambassador and
accompanying letter to Chairman of the Senate
Foreign Relations Committee advising him of the
action

LETTERS AND ORDERS REMOVING GOVERNMENT OFFICIALS FROM OFFICE

LETTERS ACCEPTING RESIGNATIONS OF PRESIDENTIAL APPOINTEES OR
ACKNOWLEDGING RETIREMENT OF JUDGES

LEGISLATION:

Approval of bills and joint resolutions
Veto messages to the House of Representatives or to the Senate
Memoranda of Disapproval (in the case of pocket vetoed bills)

PROCLAMATIONS

Hortatory and trade

EXECUTIVE ORDERS

STATEMENTS BY THE PRESIDENT, including Signing Statements on bills
and joint resolutions

DECISION MEMORANDA

(e.g., in re the United States Trade Representative's recommendations with respect to United States International Trade Commission determinations; use of cars by government officials; closing a committee meeting to the public due to the discussion of classified information; secret service protection; and delegations of authority to government officials to perform certain functions, etc.)

EXECUTIVE CLEMENCY CASES

MEMORANDA AND LETTERS TO HEADS OF EXECUTIVE DEPARTMENTS AND AGENCIES (e.g., President Reagan's first official act was the signing of a memo ordering a strict freeze on the hiring of Federal civilian employees in the Executive branch; memos inviting Government personnel to contribute to the Combined Federal Campaign and the Red Cross; setting policy on foreign travel by Government officials; and issuing a 10-point action plan in response to the President's AIDS commission report)

APPROVAL OF MEMORANDA FROM SECRETARY OF DEFENSE ON MILITARY APPOINTMENT OR ASSIGNMENT MATTERS

DISASTER RELIEF DECLARATIONS

AWARDS:

- Medals
- Citations
- Commendations
- Certificates

LETTERS TO SPEAKER OF THE HOUSE AND PRESIDENT OF THE SENATE ON SUPPLEMENTAL BUDGET ESTIMATES

PRESIDENTIAL DETERMINATIONS AND CERTIFICATIONS IN THE CONDUCT OF FOREIGN POLICY

(e.g., with respect to such matters as foreign export controls, assistance to the Nicaraguan Democratic Resistance, the production of the BIGEYE binary chemical bomb, refugee admissions, agreements with countries on the peaceful uses of nuclear energy, under the Foreign Assistance Act, the Immigration and Nationality Act, Trading with the Enemy Act, Foreign Relations Authorization Acts, etc.)

MEMORANDA TO THE SECRETARY OF STATE

- directing him to issue in the President's name exequaturs to foreign diplomatic personnel;
- directing him to issue in the President's name commissions of appointment to Foreign Service Officers in connection with various assignments;
- appointing Foreign Service Officers and directing the Secretary to issue in the President's name commissions to Consular Officers.

9 December 1988

MEMORANDUM FOR GOVERNOR SUNUNU

FROM: Chase Untermeyer

SUBJECT: Office of Presidential Personnel

I. OFFICE STRUCTURE

- o Director
- o Deputy Director
- o Associate Directors (AD's)
 - National Security Affairs
 - Economic and Commercial Affairs
 - Social Services
 - Natural Resources
 - Regulatory & Legal Affairs
 - Boards & Commissions
- o Deputies to each Associate Director
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Chase
9 Dec 88

POWELL A. MOORE

Powell A. Moore is a former Assistant Secretary of State for Intergovernmental and Legislative Affairs under President Reagan and has served on the White House staff under Presidents Nixon, Ford and Reagan.

Moore began his Washington career in 1966 as press secretary to Senator Richard B. Russell and served in this capacity until Senator Russell's death in January of 1971. He then joined the Nixon Administration, first serving as Deputy Director of Public Information for the Department of Justice and later as a member of the White House Legislative Affairs staff.

He left the White House in 1975 during the Ford Administration, and for the subsequent six years, he engaged in government relations and legislative affairs consulting for a variety of corporations and associations.

Moore returned to the White House in January 1981 on the day following Ronald Reagan's Inauguration as 40th President of the United States. As Deputy Assistant to the President for Legislative Affairs during 1981, he managed the Senate component of the legislative affairs office at the White House.

In January of 1982, President Reagan nominated him to be Assistant Secretary of State for Intergovernmental and Legislative Affairs. He was confirmed by the Senate for this position on February 4, 1982. As Assistant Secretary of State, Moore traveled with Congressional delegations to more than 35 countries and participated in meetings between U.S. Congressional leaders and 19 heads of state.

During his service in two key legislative affairs positions of the Reagan Administration, he was involved in a number of President Reagan's significant legislative achievements. He managed the Senate confirmation strategy for several of President Reagan's high level nominations including the historic nomination of Associate Justice Sandra Day O'Connor.

Moore worked on the Presidential campaign staffs of President Nixon in 1972, President Ford in 1976, and President Reagan in 1980.

Moore was born in Milledgeville Georgia, on January 5, 1938. He graduated from the University of Georgia in Athens in 1959 after attending preparatory school at Georgia Military College in Milledgeville. The University of Georgia's Henry W. Grady School of Journalism selected him as its Outstanding Alumnus for 1985 and he was similarly honored by Georgia Military College in 1986. After graduation, he was commissioned an officer in the United States Army where he served for three and one-half years with tours in Baumholder, West Germany and Fort Benning, Georgia. After leaving the Army and before coming to Washington, he worked as a weekly newspaper editor in Georgia.

He is married to the former Katherine Southward of Midway City, California. They reside with a son and a daughter in Alexandria, Virginia.

Since leaving government in late 1983, he served as Vice President for Legislative Affairs of the Lockheed Corporation and is currently a partner in the firm of Ginn, Edington, Moore and Wade, a Washington-based government relations and public policy consulting firm.

22 Dec 88

To: Gov. Sununu

This is the letter
I plan to sign
to Constantino
UNODIR (unless
otherwise directed).

Chase

cc RTeeter

OFFICE OF THE PRESIDENT-ELECT
WASHINGTON, D.C. 20270

F

19 December 1988

James Constantino
Executive Vice President
Free Congress Foundation
721 Second Street, N.E.
Washington, D.C. 20002

Dear Jim:

I enjoyed meeting with you and Mike Sanera on Friday to discuss training conferences for non-career SES and Schedule C appointees. I absolutely agree with you that training and orientation are essential for new political appointees.

I welcome the idea of George Mason University's serving as sponsor for the conferences with the Free Congress Foundation as organizer and participation from the Heritage Foundation, American Enterprise Institute, National Academy of Public Administration, and others as appropriate. The topics and program you suggested look good.

For my part, I shall tell Governor Sununu about our conversation, which could lead to White House encouragement to appointees to attend. We would also work with you in securing an appropriate place to hold the opening reception.

I understand from Jan Naylor that you will be meeting soon with the President of George Mason University to discuss the possibility of their sponsorship. Please keep Jan apprised of your progress and feel free to call me if I can be of further assistance.

Thanks to you, Mike, and Paul for your good efforts. I think we're on to something quite good here.

Sincerely,

CHASE UNTERMEYER

cc: Michael Sanera
Ross Starek
Jan Naylor