

Withdrawal/Redaction Sheet

Clinton Library

DOCUMENT NO. AND TYPE	SUBJECT/TITLE	DATE	RESTRICTION
001. paper	re: the Diarist [partial] (1 page)	n.d.	b(6)
002. memo	Marianne Smith to Bruce Lindsey [partial] (3 pages)	08/14/1993	b(6)

COLLECTION:

Clinton Presidential Records
First Lady's Office
Melanne Verveer
OA/Box Number: 20030

FOLDER TITLE:

Diary

2013-0534-S

rc1646

RESTRICTION CODES

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

- P1 National Security Classified Information [(a)(1) of the PRA]
- P2 Relating to the appointment to Federal office [(a)(2) of the PRA]
- P3 Release would violate a Federal statute [(a)(3) of the PRA]
- P4 Release would disclose trade secrets or confidential commercial or financial information [(a)(4) of the PRA]
- P5 Release would disclose confidential advice between the President and his advisors, or between such advisors [(a)(5) of the PRA]
- P6 Release would constitute a clearly unwarranted invasion of personal privacy [(a)(6) of the PRA]

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

PRM. Personal record misfile defined in accordance with 44 U.S.C. 2201(3).

RR. Document will be reviewed upon request.

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

- b(1) National security classified information [(b)(1) of the FOIA]
- b(2) Release would disclose internal personnel rules and practices of an agency [(b)(2) of the FOIA]
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- b(7) Release would disclose information compiled for law enforcement purposes [(b)(7) of the FOIA]
- b(8) Release would disclose information concerning the regulation of financial institutions [(b)(8) of the FOIA]
- b(9) Release would disclose geological or geophysical information concerning wells [(b)(9) of the FOIA]

file Diarist

Register.

The first printing of approximately 4,000 copies which go to Administration Officials, members of Congress, and certain public institutions will be held from distribution until the formal presentation is made to the President. If you look at a volume from a past President, you will notice the photo section in the book. We can arrange for the appropriate staff person, (Mark Gearan or Bob McNealy?) to have input on the selection. I mentioned to the director that Bob McNealy is doing a black and white series which might be interesting to include. Please let me know as soon as possible what the President has decided.

Photo

2) Reorganizing the Office of the Presidential Diarist is not really that complicated. The current diarist is a holdover from several administrations. The diarist is an employee of the National Archives. Like several other employees of the Archives, the White House is her work station. They are not detailees, nor or they counted as White House staff. They work for the Presidential Libraries branch of the Archives.

The position of the diarist was created to assist the President ~~in creating a historical record of the President's activities while in office to use for reference in his Presidential Library.~~ Documenting the activities of the President is done by several offices in the White House and of course by news organizations. Unfortunately, the current diary is nothing more than a compilation of this information onto a computer log and the information is not complete. Documents are collected from the Secret Service, White House Operators, Scheduling, Press and Andrew Friendly to be kept in a hard copy file which can be pulled by date or log reference. This is a helpful organization of information for the President and future library staff, but it does not fulfill the original intentions of what this position was created for.

The problem stems from the fact that until now, this office has escaped review by the Archives and the White House. It is the position of the Acting Archivist, that no office in the federal government, even that of the President, goes without review. The position should fulfill the needs of the current administration. The current diarist position was changed to a schedule C position so that the diary would be more complete. The current diarist has told the Archives that she reports to the director of scheduling in the White House. This "arrangement" was the result of a special relationship between the current diarist and a Reagan staffer. The National Archives does not approve of this situation.

It is the position of the director of Presidential Libraries and the Acting Archivist of the United States that the White House should replace the current diarist with a staff person who has the confidence of the first family and the skills to keep a diary which would be more comprehensive and more up to date.

The diarist should report to either the Chief of Staff, the Staff Secretary or better yet the President's personal secretary or assistant, i.e., Betty Currie or Nancy Hernreich. Because the position is a schedule C, the diarist has to report to a political appointee or the head of the agency. Because I have left my position, the Acting Archivist is technically in charge. The diary can also be used for time management studies if it is kept up to date. My last check revealed that the diary was several weeks behind. The diarist may be helpful at times to the scheduling operation, however once they are keeping better records, this will be less true, and it is not an appropriate use of the position.

It is recommended that a new diarist be selected and an assistant also be chosen. These positions are currently rated at GS 13 and GS 7. The position descriptions can be rewritten to upgrade the position based on the experience level of the new appointees and the responsibilities and skills required. It is also recommended that a diarist office be set up for the First Lady's office. As you know, Patty Frye, a career employee of the National Archives will be assigned from the Archives to help set up such an office. Patty will not convert to a schedule C, but she is very competent in training staff you select and has Presidential Library experience. She will gladly help organize an office of First Lady diarist and go back to the Archives when it is up and running. Patty has all the required clearances and she has reviewed the both the current and past diaries kept. She feels that the current computer system being used is out-of-date and inefficient.

1ST
LAD

It will be easy to design a system to capture the information that is desired for the computer logs. More importantly, collection of information to supplement the logs and organize the records of both the President and First Lady needs to be done. If done correctly, a completed daily log should be delivered the following day to either yourself or Betty, and to Hillary's personal assistant for corrections and annotations/ comments and any new added backup material you feel should be included when the reviewed daily log is returned to the file.

✂

The diary of the President and the First Lady, should be, what they want it to be. If they had the time to focus on this, as you have, I think they would agree, that the Johnson Administration model is preferable to what exists now. Surely, we can improve on that model with technology for one thing, and the fact that the Archives feels it is important to provide the staff positions for you to fill.

With more staff and better technology than Dorothy Territo had, we can really provide a service to this President and the First Lady, to future historians and scholars who will benefit from these captured memories, (which are the personal and presidential records of this President and the First Lady to be accessed as they see fit if they are properly segregated and filed).

The Acting Archivist of the U.S. is willing to help the current diarist find new employment. Quite frankly, the Archivist and the director of Presidential Libraries are surprised that the White House did not ask them to terminate her employment on January 20. The nature of this position is not simply one of a "technician". This is very legitimately, more so than others, a confidential assistant, i.e., political appointment.

3) Reestablishing a National Archives/Presidential Libraries Liaison Office in the Old Executive Office Building is highly recommended. I want to discuss this separately from the "Historian's Office" which you also asked for information on. I will address that in a separate memo.

Currently, there is an Archives position which is open. The position requires the person to work in the Office of Records Management in the White House, to focus on the facilitation of record collection for the Clinton Presidential Library is managed by the Presidential Library section of the National Archives. In the past, an office of several National Archive's staff existed on the fourth floor of OEOB. Although this staff worked closely with Records Management they also worked independently. The director of this office is responsible for comprehensive documentation of the Presidency and compiling biographical records of the first family. Preferably, the person in this position will go with the records to help set up and organize the Presidential Library at the end of the President's term.

There is also a vacancy--my former position--White House Liaison. The Acting Archivist and the director of Presidential Libraries have agreed on the following concept and are awaiting a request from the White House to move forward:

Hire a political appointee to work in the Office of Records Management as the White House/Presidential Library Liaison. This slot already exists. I vacated the position when it was still necessary to have someone in the Archivist Office. Now that we have established an SES position in the Archivist office, the Archives and the Administration would be better served to have the liaison start to work in the office of Records Management.

Another position which currently exists is one for a career Archives employee to work in the Office of Records Management. It is recommended that this position be filled with an employee from the Archives who has electronic records management experience, e-mail and computer expertise, and an understanding of the Presidential Library system as well as knowledge of regulations and guidance to for adhering to the Presidential and Federal Records Acts.

These two people should eventually work together in a separate National Archives/Presidential Libraries Office and coordinate with the Office of Records Management. They should eventually be able

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to hire a secretary and a technician. This is would be similar to the model used during the Carter administration. This staff should report directly to the President's Staff Secretary and work with the Chief of Staff and General Counsel's Office.

For now, it makes sense to hire someone that the First Family and President's staff has confidence in. This person will have to work closely with all staff members of the Executive Office of the President to assure proper record keeping of Presidential, Personal, Political and Federal Records throughout the White House. This will include keeping proper records of trips.

This person (the Presidential Library/White House Liaison or Presidential Library/Archive's Liaison) can be rated at GS12, GS14, or GS15 depending on their experience and job responsibilities. I have already instructed the Acting Director of Archives Personnel to begin working on a position description. I think some combination of the position descriptions which were designed for the Nixon and Carter Administration will be sufficient.

I have recommended that (b)(6) be considered for this position. Once the person understands completely what is and is not being done now in the Office of Records Management and how the Presidential Library System and National Archives serves the President and his administration, she or he can best design an office which will suit the needs of this administration. (001)

Marie Allen is recognized as having the most efficient and organized Presidential Libraries/Archives Office ever at the White House. She works in the Records Administration Branch of the National Archives. Marie has already met with me, the Acting Archivist and (b)(6) to explain in detail how she set up and ran her office. Marie is willing to help whomever the White House selects for this position to get their office up and running and organized. The Acting Archivist of the U.S. has said that she allow for Marie to assist the "Liaison" for as long as needed.

Marie was actively involved with training staff in the Office of the President to properly handle and preserve their records, and she provided daily guidance on federal laws and regulations which restrict the use and acquisition of certain record materials. Marie did a taped interview with each member of the White House Staff before they left the office. She also interviewed all the family members of the President. She collected articles and books written about the first family. She kept scrap books. She made sure the staff understood that they were creating history. She had historians in to lecture at the White House, to give perspective to the evolution of the office and to reflect on how historians do research and analysis once a President leaves office by studying the records in the libraries and the main office of the National Archives.

Marie made certain that Records Management only had access and filed the information/documents --records that were Presidential Records. Marie help the family and key staff organize the filing of their personal --political--and presidential records. Her presence served as a constant reminder of proper procedures and reassurance that it was someone person's sole responsibility to constantly inform new staff and remind veterans of the importance of the President's records to the President and to the American people. The reputation of the administration would be validated by records. She also made certain that private papers which were donated to the future library were done by the legal deed of gift. She answered questions about the use of film footage of the President, the handling of gifts, the acceptance of gifts by the staff, the classification and declassification of documents, access requests, etc. She set up oral history programs. She trained advance and traveling staff. She helped with the Carter Library planning--which was done late in the term because the President was convinced he would be re-elected until the end. She had a least helped with preliminary planning. She also stayed focussed on the records of the President after the election. Typically at that point, if there is a change in administrations, Records Management begins to focus on the incoming administration. At the same time, there is a rush of organizing and separating files and records at the end. The Bush and Reagan Library Director's now have an incredible, almost unmanageable mess on their hands. Millions, Millions of documents and thousands of records in other forms other than Presidential Papers. An ounce of prevention.....could save the taxpayers a lot of money and the future foundation and Clinton Presidential Library staff a lot of headaches and frustration.

National Archives



MEMORANDUM

Washington, DC 20408

TO: Nancy Hernreich
Deputy Assistant to the President for Appointments and
Scheduling

FROM: Marianne Smith
White House Liaison

Date: September 23, 1993

RE: National Archives Support for the President

This memo is intended to guide you through the binder of materials I have put together for you to use as reference on issues we have discussed in earlier meetings regarding National Archives Support for the President. I have compiled memos which were prepared for me or by me on a variety of topics.

The first section recommends the formal re-establishment of an Archives Office in the OEOP to coordinate the National Archives Presidential support activities to the administration and to assist in the planning process for a Clinton Presidential Library. This section looks at the past practices of the last several administrations.

It is the professional opinion of the Acting Archivist of the United States, the Director of Presidential Libraries, and the directors of the Carter, Bush and Reagan Libraries that coordinating all the activities involving the collection of records and materials (presidential records, personal records, photo's, films, gifts, articles, dairies, trip logs, oral histories, public papers, staff manuals and directories, donated papers of administration officials, notices, speeches etc.) should be managed in one office.

There are numerous advantages to having a single point of contact, an office that has the responsibility of collecting, segregating, inspecting, and retrieving records of the Office of the President through out the term of the President. Inquiries and special access requests to classified materials could be managed in one location. Less will be lost, forgotten or misfiled, and an organized transfer to the eventual library location could take place. The legal status of particular records are less likely to be challenged if they are properly separated, preserved and filed.

Also in this section are two memos which list the current and past support activities provided by the National Archives to the President and an outline of the activities provided during the Carter administration.

Presidents Johnson, Nixon and Carter were very organized in records management. As a matter of fact most of the staff in White House Records Management and the senior staff at the National Archives began working during these administrations. President Carter had the most efficient and organized office. Since that time activities have been decentralized and more disorganized (which has lead to many problems, both legal and personal for the past two administrations). I highly recommend that you meet with Marie Allen who prepared the last memo in this section.

The second section starts off with a memo which was hastily prepared for Bruce Lindsey. This memo details the possible design of an Archives Office at the OEOB. Also included are the position descriptions of the managers of this office during the Nixon and Carter administrations. I believe that a combination of duties and skills required by these position descriptions should help clarify the responsibilities and knowledge needed for a new manager who should be selected by you and John Podesta, and approved by Bruce Lindsey and Mack McLarty. The last page is simply a listing of current Archives' employees whose work station is the White House.

The third section discusses the importance of giving special attention to the papers and records of the first lady. Ideally, the Archives would supply support staff to assist in a separate collection of Personal Papers of the First Lady and give guidance on creating and keeping a diary.

The fourth section are simplified guidelines for records separation and filing in the White House. It was prepared to use for easy reference, when there is a complicated situation the more detailed legal guidelines prepared by the counsel's office should be referred to. Giving daily guidance on these guidelines would be the responsibility of the Presidential Library/Archives Liaison Office at the White House working in coordination with the offices of the Staff Secretary and Counsel.

The fifth section explains Presidential Records Act requests. This is important for every member of the President's Office of Legal Counsel to understand. Depending on the topic, requests were given to one of several lawyers in the Bush and Reagan administrations. All lawyers who reviewed access requests were political appointees. For example in the past administration Brent Hatch, Fred Nelson and Gene Shaer answered overall presidential. Ron Vonlembke and Paul Beech responded to Iran/Contra because of their high clearances and expertise, Janet Renquist handled requests from the Hill such as the Foreign Relation's Committee, and Nick Rostow handled NSC related requests. (These names were provided to me by the Office of Presidential Libraries in the Archives which does not mean the names are spelled correctly.)

Access requests should be carefully reviewed. "On going business of the President" needs to be clearly understood. The Presidential Library/Archives Liaison could also help with tracking and timely response, facilitation or denial of these requests and could make certain that they were reviewed by the proper White House official in the counsel's office.

The sixth section is some backup material on the Presidential Diarist Position. The position description was written years ago. It certainly can serve as a guide for re-writing a position description which would serve the needs of this President. This is the President's prerogative. What does he want in a diary? How does he want it kept? Who or whom does he want to keep his diary or diaries? It is highly recommended that this position be reviewed and redesigned if necessary and that an assistant be hired. It is also recommended that a similar office be set up for the First Lady. Again, this would be National Archive's staff, both political and career, whose work station would be the White House.

The seventh section is a sample day taken from the files of the current diary. I have given you a separate binder with examples taken from past diaries.

The eight section are memos that were prepared for the staff going on the trip to Japan. Although I gave these memos to the Advance Office to pass on to Wendy Smith and Andrew Friendly, I don't think either of them received it. As far as that trip went, it was my understanding that John Podesta was going, so I did not concern myself. It turned out that he did not go, I regret that I did not try to be more helpful. It would also be the responsibility of the Presidential Library/Archive Liaison to train traveling staff on what to save on a trip and how to keep a trip log.

The ninth section is a memo prepared by the National Archive's Chief of Document Conservation and Head of the Preservation Lab. Past administrations have taken advantage of the expertise of this office. The National Archives wants to help duplicate and preserve the family scrap books so that they are preserved for history. Eventually, the descendants of the Clintons will most likely donate these materials to the President's Library. Whether it is 30 or 50 years from now, the Archives would like them to be kept in proper condition and will assist the family. This does not mean that the Archives would expect for the family to donate these scrap books during their life time. Many snapshots will deteriorate over time and should be re-photographed as well as put in albums.

The tenth section describes the functions of the Office of the Federal Register in the OEOB.

The eleventh section is a compilation of information regarding Presidential Libraries in general. I have given you the separate binders on the establishment of a Presidential Library including site selection and descriptions of existing libraries. Also included in this part are documents describing the Presidential Library Advisory Committee and a list of members. I have also included the lists of officers, directors and committee members of individual libraries. These are very impressive lists. One can see that foundations include members who played a significant role in the lives of the past presidents and still play a role in the current world of politics. President Clinton should designate someone on his staff or in his inner circle to sit on the Presidential Libraries Advisory Committee. And someone, not necessarily the same individual, should become a point person, who will eventually help with the efforts of the foundation. Certain monies should be raised while the President is still in office. This has to be handled with much discretion, I can't emphasize just how important that discretion will be.

The twelfth and final section is perhaps to me, the most important. This is the section of which I am most interested. It has to do with establishing-- for the first time-- a White House History Office. Please see separate memo on this topic and the enclosed proposals.

National Archives



Washington, DC 20408

Date : April 22, 1993
Reply to :
Attn of : NL
Subject : Archives Support for President Clinton
To : Marianne Smith

The National Archives has provided archival and records management assistance to the Presidents and their staffs since the agency's establishment. While the number of support activities has increased dramatically in the past twenty years, the administration and coordination of this work in the White House has become decentralized. Therefore, it is recommended that President Clinton's staff consider re-establishing an archives office to coordinate this agency's support activities and to assist in the planning process for a Clinton Presidential Library.

Background:

Shortly after the National Archives was established in 1934, President Roosevelt called on the Archivist of the United States to assist him in planning a Presidential Library to be located on his family estate in Hyde Park, New York. The National Archives quickly responded to the President's request. The Library was constructed with private funds on land donated by the President and the Archives began operating the facility in 1940.

The Archives support activities for the President continued during subsequent Administrations. In the mid 1960's, the National Archives established a permanent office located in the Old Executive Office Building (OEOB) to coordinate and direct the growing number of archives activities in support of the President. The National Archives maintained an office in the OEOB for nearly two decades, reorganizing its structure and staffing to meet the needs of each successive President.

In 1984, the Archives office was disbanded. However, all of the archival and records support activities continued and in fact were expanded over the remaining years of the Reagan and Bush Administrations by detailing employees or providing support from various Archives offices.

The National Archives Presidential support activities and planning for a Presidential Library was most effective when

an archives office was maintained in the OEOP. Three distinct office organizations have been established for previous Administrations.

* The first example of an archives office was created during the Johnson Administration. This office was headed by Ms. Dorothy P. Territo, a professional records manager, who had organized Lyndon Johnson's Senate and Vice Presidential papers. Ms. Territo reported directly to President Johnson.

The second example of an archives OEOP occurred during the Nixon Administration. The Archives hired Mr. Jack Nesbitt, a trained historian, to head the archives office. Mr. Nesbitt's office reported to the White House Chief of Staff HR Haldeman's organizational structure.

The final example for an archives office was created by President Carter in 1978. This office was headed by Marie B. Allen, a professional archivist, who had previous experience working in the Nixon archives office. The Carter office reported to Hugh Carter Jr., who headed the White House Office of Administration.

The structure and organizational placement of each of the above archives offices worked effectively for the Archives and the President. However, the Johnson example had several distinct advantages which improved the planning for the President's Library and the level of service that could be provided to the President. Most of these advantages were related to Ms. Territo's previous work experience with Lyndon Johnson. This relationship and the high degree of confidence that existed between the President and the archives office led to several activities and office functions that are unique to this example including the following:

1. combining the responsibility for the President's personal files, official diary, and photograph index in a single office;
2. establishment of a single point of contact for all National Archives offices including the Office of Presidential Libraries (NL), the Office of the National Archives (NN), the Office of Public Programs (NE), the Office of the Federal Register (NF), and the Office of Records Administration (NI);
3. providing for direct working relationships along inter-office lines with the First Ladies Office, the Office of White House Counsel, the Press Office, and the White House Records Office;

4. allowing for rapid response to Presidential needs by coordinating and implementing Presidential directives.

Recommendations

In light of the broad range of Archives support activities and the increasing records responsibilities of the Presidential Records Act, President Clinton should consider establishing an Archives Liaison Office. If such an office is established, previous experience in staffing, organizational placement and program responsibilities should be examined to assure that this office allows the Archives to serve the President in the most effective manner possible.



JOHN FAWCETT
Assistant Archivist
for Presidential Libraries



Date : April 26, 1993
Reply to :
Attn of : NL
Subject : Archives White House Support
To : Marianne Smith

The attached memo gives a history of the Archives support for the President. The memo recommends the re-establishment of an "Archives Office" in the OEOB based on the Johnson Administration model. This recommendation is based on the fact that the Johnson archives office provided extremely effective support for the development of the LBJ Library, and my sense that this office would facilitate President Clinton's implementation of the Presidential Records Act.

The role of the Archives Office

The primary responsibility of the Archives office would be to provide archival assistance on Presidential records, storage and reference service on the personal papers of the President and the First Lady, and to assist the President in planning for his Presidential Library.

The Archives office would provide the same type of assistance for the President's and First Lady's personal papers, as is currently provided by the White House Office of Records Management for official Presidential files. The head of this office would work closely with the Director of the WHORM and the White House Counsel's Office to ensure that the Presidential Records Act is adhered to by following proper records handling practices. The Archives office would be particularly helpful to President Clinton in carrying out the Presidential Records Act requirement that documentary materials created by the President or his staff "...to the extent practicable, be categorized as Presidential records or personal records upon their creation or receipt and be filed separately." (44 USC 2203) By maintaining a separate file for personal papers, the Office would be implementing the requirements of the Presidential Records Act and guarding against inadvertent designation of personal papers as Presidential record.

For the most part, during the Reagan and Bush Administrations the early separation of personal and record materials simply did not occur, nor were there consistent record keeping practices on what papers should be filed

separately in a personal file. The Archives was not asked to provide assistance with the President or First Lady's personal archival material, or in ensuring the early creation and maintenance of a separate file for President's and First Lady's personal papers.

The Archives did provide assistance to the White House Office of Records Management, WHORM, and the Office of White House Counsel with respect to Presidential Records issues during the past two Administrations. This support has been provided by the Archives liaison to WHORM and through the Office of Presidential Libraries and NARA legal counsel to White House Counsel.

The lack of archival assistance for personal papers in both Presidential Administrations and the unfamiliarity with the Presidential Records Act created some archival problems that the Presidential Libraries are dealing with today. Clearly personal items, for example the President's letters to his grandchildren or the First Lady's letter to her close friends, have been filed with Presidential record material. Private political materials have also been filed with Presidential record material. The inadvertent mix of some Presidential record and personal papers causes confusion as to proper file status and as to the appropriate statutory authority governing access. Most of the separation of personal papers was done at the end of these Administrations at the very time when the determination as to proper record status is the most difficult to make.

Presidential personal papers are a highly valuable historical record of a Presidential Administration because they often contain the most personal and private insights of the President and his key advisors. Under the Presidential Records Act it is essential that these files be established and maintained on a consistent basis. Two Presidential Administrations have shown us that the distinctions between what is Presidential and what is personal record need to be thought about early in the Administration. Personal papers of the President, his advisors, and his family are usually donated by the President, or deeded in his will, to his Presidential Library. For the reasons mentioned above and to ensure the creation and proper protection of the most complete historical record, I believe that the National Archives should provide archival support for the President's and First Lady's personal files by the re-establishment of an Archives office.

Responsibilities of the Archives Office

The size of the Archives office staff would not have to be large because the volume of personal papers is much smaller than the Presidential Records file. The Personal Files could include the following types of materials: Diaries, Journals, Personal Notes, Campaign and Re-election Files, the President's records as head of the Democratic Party, Pre-Presidential files that the President may need to use as President, family and personal correspondence, financial records, First Lady's personal files, and copies of Presidential records that the President may want for his personal use.

A primary role of this Office would be to assist the President in his plans for a Presidential Library. The Office should serve as a liaison with groups working to establish a Clinton Library. The Office would work closely with the White House Gift Unit to make sure that appropriate exhibit material for the Clinton Presidential Library is properly identified and maintained. The staff of the Office would work closely with the President's and First Lady's advance teams to make sure that their trip activities are adequately documented and exhibit items are brought back to the White House for eventual use in the Presidential Library.

Archival concerns dealing with the development of computer systems in the White House offices could be referred to this office. The requirement to separate Federal Records and Presidential Records in the NSC and EOP offices has a parallel in the White House offices e.g., mixing personal and Presidential records may convert personal papers to government property. Under the Presidential Records Act any computer systems that include both Presidential records and personal records should have the ability to segregate these files so that the President does not lose control over his personal material.

The President's daily diary provides another example of a computer system that requires the ability to segregate personal and record material. The Diary, to be most useful to the President and future scholars, should contain both the President's official, personal and private political activities. Yet, if there is no provision to designate these types of activity when the information is entered, the President's personal information may become Presidential record.

Organizational Placement

If an Archives office is re-established, there are several options for the organizational placement of this Office. These options include reporting directly to: (1) the President and First Lady; (2) the Staff Secretary; (3) the Chief of Staff, and (4) Office of White House Counsel. Whatever the placement of the Office, it is important that the work of the Office be perceived as having high level support.

Additional areas of responsibility for this Office could include consolidating some activities that the Archives has performed for different offices in the White House. These activities include the Federal Register's publishing of the "Weekly Compilation of Presidential Documents", and the "Public Papers of the President"; preservation advice; research activities for the President and First Lady; and oral histories conducted with current and departing staff.

The proper selection of the person to head this office is critical to its success. This individual must have professional experience with personal papers. Presidential Library background and familiarity with the Presidential Records Act would be particularly useful to this Office. The individual must be one that will have the full confidence of the President and Mrs. Clinton.

I hope my preliminary thoughts on this topic have been of some assistance. If the re-establishment of an Archives Office is an idea that has interest to the White House, I will be happy to provide more detail as to the functions and staffing for this Office.



JOHN FAWCETT
Assistant Archivist
for Presidential Libraries

Support Activities provided by the
National Archives
to the President

I. Current Archives Support Activities

- *** Provide guidance to WHORM on the Presidential Records Act. For example, this includes making recommendations on bulk mail disposal, sampling of bulk mail and giving advice on the distinctions between Presidential record and personal paper material.*** Archivist, NARA Legal Counsel, Office of Presidential Libraries
- *** Assistance to the National Security Council with declassification *** Office of Presidential Libraries
- *** The White House Counsel's Office will be receiving notification of requests for the Presidential records of Reagan and Bush. The notification is required by the Presidential Records Act and the accompanying regulations. The purpose of the notification is to give Counsel, on behalf of the incumbent President, the right to object to any request for access or release of Presidential records to protect Executive privilege. Any requests for special access that are received by the National Archives are referred to White House Counsel. The notification is in writing from the Office of Presidential Libraries and in accordance with the regulations gives Counsel 30 days to object.
- *** Maintain President's daily diary and detail a diarist *** Office of Presidential Libraries
- *** Provide reference or documents from Presidential Libraries dealing with domestic and foreign policy issues to facilitate the ongoing business of the incumbent President. *** Office of Presidential Libraries.
- *** Assistance to White House Counsel on archival issues including providing information on openings of Presidential records or Nixon White House materials. Provide guidance on the record status of materials produced in the White House. *** Archivist, Office of Presidential Libraries, Office of Records Administration
- *** Publication of weekly compilation of Presidential documents and public papers of the President, and transcription and annotation on these items. *** Office of the Federal Register

- *** Provide archival guidance to the following White House Offices: Photo Office, White House Television, White House Communications Agency (audio and video sections), Office of the Vice President. *** Office of Presidential Libraries
- *** White House Television video recordings, including President Clinton's Inaugural Address and Mrs. Clinton's Health Care Reform Message have been transferred to NARA. These recordings have been placed in the public domain and NARA is charged with the responsibility for making these recordings available to the public at the cost based on NARA's fee schedule. *** Office of Presidential Libraries and Office of Public Programs
- *** Provide background material on various Presidential Libraries and answer White House reference questions dealing with material in the Presidential Libraries. For example, during the Carter Administration, the Presidential Libraries provided reference materials from their holdings on the history of the Old Executive Office Building. Other examples, include loans of exhibit items and providing video recordings of Presidential events from previous Administrations.
- *** Assist the Gift Unit on archival and legal questions dealing with Head of State and personal Gifts. *** Office of Presidential Libraries and NARA General Counsel
- *** Provide courtesy storage of all White House materials destined for a Presidential Library. Material included in this category is: White House Central Files, textual records; White House Gift Unit, foreign and domestic gifts; WHTV and WHCA, video and audio recordings of Presidential activities; and Vice Presidential records. This material is stored in the National Archives Building in downtown Washington for rapid retrieval. *** Office of Presidential Libraries
- *** Recommendations on archival quality of inks and paper. *** Office of National Archives
- *** Assist with exit interview of departing staff. *** Office of Presidential Libraries

Support Activities Provided by the National Archives to the President

2. Past Archives Support Activities

*** Conducting oral history interview with departing White House staff

*** Coordinating with the President's personal administrative staff to maintain storage of personal papers including tape recordings of meetings and phone conversations

*** Maintaining Personal Papers of the President

*** Establishing and maintaining a diary backup file for the President consisting of supporting documentation to the daily diary

*** Establishing and maintaining a Presidential night reading and handwriting file

*** Maintaining originals of Head of State correspondence file for future exhibits

*** Coordination with Presidential advance team members to ensure appropriate documentation on travel and to save potential museum items

*** Provide reference services to the President from his personal files and reference on topics of interest to the President

*** Liaison with the head of White House Office of Records Management on the President's Personal and official files

*** Assisted the White House Correspondence Unit with requests dealing with personal aspects of the President and his family history

*** Maintained scrapbooks of important events

What is this



National Archives' White House Liaison Office Programs During Carter Administration

Assisted White House staff with records management

- o drafted written procedures (usually at request of Counsel)**
- o surveyed records retained in staff offices
(jointly done with White House Office of Records Management)**
- o answered staffers' questions concerning records management**
- o provided courtesy archival storage and retrieval for personal,
political and other pre-Presidential documentary materials**
- o evaluated and recommended changes in recordkeeping practices
for Vice President Mondale's office**
- o identified appropriate destruction facilities for disposable
Presidential materials**
- o identified and/or created documentation for electronic records systems**

Planned and implemented oral history programs

- o conducted recorded interviews and secured legal instruments for deposit of
tapes in the Carter Library for over 150 staff members including Jody Powell,
Robert Lipshutz, Lloyd Cutler, Zbigniew Brzezinski, Ann Wexler, Tim Kraft,
Stuart Eizenstat, Gerald Rafshoon, Alfred Kahn, Kit Dobelle, Mary Finch Hoyt**
- o conducted several dozen biographical interviews with members of
Carter/Smith families in Georgia, Virginia and North Carolina. Completed legal
instruments and transcripts for deposit in Carter Library.**
- o submitted proposals for several other oral history programs, related to Camp
David Accords, among other events**

Advised White House staff on archival issues

- o prepared briefing papers at the request of various White House staff members
on such topics as the implementation of the Presidential Records Act, planning
for a Presidential Library, copyright and literary property issues, etc.**

Withdrawal/Redaction Marker

Clinton Library

DOCUMENT NO. AND TYPE	SUBJECT/TITLE	DATE	RESTRICTION
002. memo	Marianne Smith to Bruce Lindsey [partial] (3 pages)	08/14/1993	b(6)

COLLECTION:

Clinton Presidential Records
First Lady's Office
Melanne Verveer
OA/Box Number: 20030

FOLDER TITLE:

Diary

2013-0534-S

rc1646

RESTRICTION CODES

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

- P1 National Security Classified Information [(a)(1) of the PRA]
- P2 Relating to the appointment to Federal office [(a)(2) of the PRA]
- P3 Release would violate a Federal statute [(a)(3) of the PRA]
- P4 Release would disclose trade secrets or confidential commercial or financial information [(a)(4) of the PRA]
- P5 Release would disclose confidential advice between the President and his advisors, or between such advisors [(a)(5) of the PRA]
- P6 Release would constitute a clearly unwarranted invasion of personal privacy [(a)(6) of the PRA]

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

PRM. Personal record misfile defined in accordance with 44 U.S.C. 2201(3).

RR. Document will be reviewed upon request.

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

- b(1) National security classified information [(b)(1) of the FOIA]
- b(2) Release would disclose internal personnel rules and practices of an agency [(b)(2) of the FOIA]
- b(3) Release would violate a Federal statute [(b)(3) of the FOIA]
- b(4) Release would disclose trade secrets or confidential or financial information [(b)(4) of the FOIA]
- b(6) Release would constitute a clearly unwarranted invasion of personal privacy [(b)(6) of the FOIA]
- b(7) Release would disclose information compiled for law enforcement purposes [(b)(7) of the FOIA]
- b(8) Release would disclose information concerning the regulation of financial institutions [(b)(8) of the FOIA]
- b(9) Release would disclose geological or geophysical information concerning wells [(b)(9) of the FOIA]

cc: Nancy Hennrich

DETERMINED TO BE AN
ADMINISTRATIVE MARKING
INITIALS: JH DATE: 1/22/2014

~~Confidential~~
M E M O R A N D U M

TO: Bruce Lindsey
Assistant to the President, Senior Advisor and
Director, Office of Presidential Personnel

FROM: Marianne Smith
Assistant to the Archivist of the United States and
White House Liaison X 7560

Date: August 14, 1993 302-501-5130
302-332-0864 - NEW # 482-1684

RE: National Archives / White House Support Issues

As I mentioned to you last week, I have been passing along a lot of information (both paper and verbal) on the National Archives, Presidential Libraries and the way the White House flow of records works (in theory and by observation of different operations) to (b)(6) (b)(6) has a great interest in the National Archives. I am sure that she has passed along much of this information to Diane Blair. I met (b)(6) in March and asked her to consider the position of Presidential Diarist (a schedule C position in the White House), I asked her to consider that the position could be re-designed to suit the needs of this President and the First Lady. Currently, there are three positions open at the White House, Presidential Diarist, Assistant Diarist, and Supervisory Archivist/Presidential Library Liaison. [002]

It is now clear to me that (b)(6) would be a very good candidate for the Supervisory Archivist/Presidential Library Liaison position. In order to do an effective job, this Archives Liaison will need to develop personal contact with prominent officials of the President's Administration as well as have occasional contacts with the President, members of the President's family, his friends, and associates; officials of organizations authorized to plan the establishment of the future Presidential Library (University presidents, national leaders in business and professions) high level officials in Federal agencies; members of Congress and their staffs and the Archivist of the United States. Among other responsibilities the liaison will need to undertake extensive and sensitive negotiations and solicitations of personal and institutional papers for proper filing and preservation and eventual deposit in the future Presidential Library.

* The primary responsibility of the Archives Office at the White House will be to provide archival assistance on Presidential records, storage and reference service on the PERSONAL papers of the President and the First Lady, and to assist the President in planning for his Presidential Library. The White House Office of Records Management handles PRESIDENTIAL papers, i.e.-property of the government which can be accessed 5 years after the President leaves office. The Presidential personal papers are a highly valuable historical record because they contain the most personal and private insights of the President and his key advisors.

The head of the Archives Liaison Office at the White House will work closely with the Director of White House Office of Records Management and White House Counsel's Office to ensure that the Presidential Records Act is adhered to by following proper records handling practices. The person in this position will need the highest clearances and will have access to almost all documents created by the President and his staff.

The candidate for this position must understand archival theory, have a full working knowledge of the Presidential Records Act, the Federal Records Act, the Presidential Libraries Act, and all the regulations for complying with these laws. This person will have to have a good and positive working relationship with key White House staff and the First Family in order to serve the President by making sure his staff throughout the executive office follow guidelines for proper record keeping.

For example, one concern is that we need to have someone go to each office and give hands on instruction on segregating Presidential versus political/personal records on computers (E-Mail) and with inter-office and outside correspondence. This is usually a problem near election time, when staffers writes memos which include both political and presidential information. The memo then becomes a Presidential Record. The style of this politically active White House staff may create the potential for inadvertent co-mingling of records of discarding important historical information because they do not have that someone there yet to guide them and remind them.

The Archives stores the President's photos, film, video and gifts (among other records) of the current administration. There are laws about how these materials can be used during and after an administration. Someone who cares about the President, the integrity of the his Presidency, the image of the White House, someone who will guide and guard the historical record of Clinton's Presidency and who has professional credentials needs to be in this job. Personality may be an issue, this person needs to work close with the inner staff at times and (ideally) will continue to serve the President at his future library.

We need to re-establish an Archives Office at the White House which can save the administration from a lot of legal problems over record keeping practices during the administration and to make certain that an adequate historical record of the Clinton Administration exists. We are loosing time in this regard. Historical information is being lost, the President's diary is incomplete, the First Lady doesn't have one and her records need to be organized. According to the National Archives, unfamiliarity with the Presidential Records Act has created problems for the White House Counsel's office and at the presidential libraries. Two Presidential Administrations since the passage of this law has shown that the distinctions between what is Presidential and what is personal needs to be thought about early in the administration.

Personal records that are stored in Records Management, even if they are marked personal, may lose their status and become government property.

I have researched the different Archives office configurations that existed in the White House since the Johnson Administration. I believe I have a model in mind that will suit and properly serve the President and First Lady. Because of Dana's keen interest I have been sharing a lot of my concerns and information. I don't do this to raise her expectations, she understands the importance of the issues and someone inside needs to be aware of the different interactions between the Archives and the President's records, and the options available to the President. Minimally, these interactions include the following offices: Records Management, NSC, Communications, OMB, WHTV, WH Communications Agency, Correspondence and the Gift Unit.

The person in this position must have the full confidence of the President and Mrs. Clinton. It is important that this person understand archival processes and electronic records management. The person in this position will need to have the support and cooperation of staff throughout the Office of the President. It will take six months for a person either from inside the Archives or should Dana be chosen, to be fully trained, introduced, organized and operating. I'm certain that the President and First Lady are concerned about the history of this presidency. Historians and scholars will base their work on the records of the President and First Lady which will be available 5 years after they leave office. Access to personal records is controlled by them, but not if they are filed wrong, they may want to release personal records earlier or later than 5 years. *(can be tough)*

We have provided information on Presidential Libraries to representatives from Little Rock, Hope, and Fayetteville. It has been our intention not to show favor or encourage any one city more than the other. I have passed on information to Evelyn Lieberman on this matter in the hopes that she would give it to the First Lady. Since we have no official, appointed Archivist, we need to get support from the top in the White House to ensure that the President's and the American people's interest is attended to. There will be many, many more special access issues and legal problems once the Presidential Records Act kicks in in full force on January 20, 1994. Further details will be provided. In general, the Archives Liaison will:

- Assist the White House Staff with Records Management —
- Survey all records retained in staff offices —
- Set up an oral interview process for all key staff before they leave office or change positions, these recordings go to library —
- Give guidance and answer staffer's questions concerning records management including advance staff on trips —
- Encourage the President and First Lady to record their thoughts and feelings, to file things separately —
- Evaluate and recommend changes in record keeping processes —
- Advise White House Staff on archival issues —

Prepares briefings on the Presidential Records Act -
Submit proposals for Oral History Programs -
Work closely with Counsels Office regarding access to
~~Presidential Records and Materials -~~

~~Oversee the work of the Diarist -~~ The Diary, to be most useful
to the President and future scholars, should contain both the
President's official, personal and private political activities.
However, if there is no provision to designate these types of
activity when the information is entered, the President's personal
information may become Presidential Record. Adequate backup files
and supporting information should compliment the logs of the
President's schedule, phone calls, briefings and visits.

Other issues to be addressed:

Informing the First family about past problems with selecting
a site for a Presidential Library, timing, laws, foundations, etc.

Getting a Historian office set up (see one proposal attached)

Providing professional archives staff to organize the First
Lady's records and provide her with a Diarist.

Setting up a speakers series of Historians at the White House
to give staff perspective and sense of their historical mission.

Visiting each Office of the President and Vice President to
ensure that they understand which records they create that belong
to the President's historical record.

- (Creating an instructive video on creating, saving, filing
records of the office of the President -particularly electronic and
have it as required viewing of new staff) *maybe*

Staffing the Archives Office. Currently, one position exists.
I would need to change the status of this to hire (b)(6) or we can
possibly transition her into my position for starters. Ideally,
I believe the office should consists of the following;

An Archives Liaison (selected by the First Family-Supervisory
Archivist/Presidential Library Liaison)--schedule C

An Archivist with National Archives experience, Presidential
Records act knowledge, declassification, electronic records and
computer technology expertise (particularly E-Mail) etc.--career

An archives technician to provide instruction and care of elect
ronic records, textural materials, --career

A Historian to provide reference services on past practices of
other administrations--historical data on past presidential
initiatives--access to information from other history offices
throughout the Federal government and Congress, to support the
Office of Communications and Congressional Relations, to conduct
oral history project and interviews, to collect current stories
written and produced about the present administration, to begin to
provide an institutional memory for this administration as it ages -
-(a history office exists in the other branches of government and
in most of the federal agencies--should exist at White House)

----Administratively determined

Presidential Diarist, First Lady Diarist, Asst Diarist--Sched c

And if necessary secretarial support (career)

This office in the Past was on the 4th floor of OEOB, it has been a much larger staff in past, Reagan and Bush cut the Archives staff and put more on White House, now their libraries are sorry, so to may be Mrs. Reagan and Bush, and the Archives has a more difficult job organizing their holdings now. It would be more cost efficient, wise, less legally troublesome to do it right now, the other advantage is a better historical record of a Presidency that many are going to want to study and write about. The Archives will provide this staff, it just needs to be requested to be done.

The current Acting Archivist (career) does not have Presidential Library experience or White House exposure prior to the last few months. OPM has told me that we will get support for this new reconfiguration and more schedule Cs once a new Archivist is appointed. In 1985, the National Archives had become independent of GSA, now the Archivist reports to the President. Since gaining independence they have never approached OPM for additional schedule C's which they are entitled to as an independent agency. So we have some flexibility once an Archivist is in place. For now we can do the following:

1) Change the status of the Archives position at the White House in the Office of Records Management and appoint (b)(6) or another person as Supervisory Archivist/Presidential Library Liaison. This person could start getting instruction and giving guidance a.s.a.p.

(b)(6)

3) Rethink how Counsels office will deal with special access requests to records, past administrations had 4 or more attorneys which answered different topical/classified requests.

Please give me the green or red light on the way I am proceeding with this. Thanks-----Sorry this is soooo long.

NARA → National
Archives and Records
Administration

SUPERVISORY ARCHIVIST, GS-1420-14

White House during Carter Administration

I. Duties

As Supervisory Archivist (Director, ^{Clinton} ~~Carter~~ Presidential Papers Staff) in the Office of Presidential Libraries, Incumbent is responsible for planning, initiating, administering and evaluating all of the programs of the Presidential Papers Staff. This Staff has responsibility for long-range planning, identification and implementation of objectives and coordination of programs for the ~~Jimmy Carter~~ ^{B. Clinton} Presidential Library. During the Carter Administration, the Staff will coordinate the archival and records management activities of the White House Office of the Executive Office of the President with the objective of securing comprehensive documentation of the Carter Presidency and compiling a biographical record of the Carter family.

- Develops building, site and program recommendations for a future Carter Library, integrating archival expertise, experience, and goals with the President's objectives for the Institution; coordinates and maintains effective relations with various private organizations and Government officials working toward the establishment of a ~~Carter~~ ^{Clinton} Library; advises private organizations and Government officials concerning legal and legislative steps necessary to establish a Presidential Library and works with ~~the~~ ^{NARA} Counsel and Congressional staffs to develop the necessary legal instruments and legislation.
- Develops and implements programs for the maintenance of archival controls over ~~Carter~~ ^{Clinton} Presidential materials from their origination in staff offices to their placement in the Presidential Library; interviews and advises major records creators in the White House Office; locates and evaluates pre-Presidential and biographical materials; arranges for periodic retirement of noncurrent records; and coordinates reference services for ~~Carter~~ ^{Clinton} materials in archival storage. Disseminates information on proper archival techniques through oral presentations and written guidelines developed by the Presidential Papers Staff.
- Provides professional assistance and coordinates the handling of textual and audiovisual materials by the White House Central Files Unit, White House Communications Agency, White House Photograph Office, Naval Photographic Center, White House Gift Unit, Georgia State Archives, and others. Maintains effective relations with these and other organizations interested in the documentation of the Carter Administration, as well as White House Staff and personnel of the ~~General Services Administration~~ ^{NARA}.
- Plans, initiates and administers an oral history program to secure the recollections of Carter staff, associates, and family members as

well as an exit interview program for departing White House Staff members. Incumbent assigns resources and establishes interview priorities, provides professional supervision in the conduct of interviews, evaluates interviews for adequacy of information elicited, and supervises transcription and indexing methods.

- Coordinates requests for archival and records management services from various offices in the Executive Office of the President and provides general information about the operation of the National Archives and Records Service; acts as liaison for the Archivist of the United States and the Assistant Archivist for Presidential Libraries with White House Staff members. Provides appraisal and/or referral services for the evaluation of records of Presidential commissions, task forces, advisory boards, and other units of the Executive Office of the President.
- Initiates and administers programs for the creation or acquisition of reference collections for the Carter Library of pertinent published and unpublished materials, such as books and monographs on the Administration's history and accomplishments and biographical files concerning Presidential appointees.
- Plans, initiates, and administers programs for the identification, location and preservation of significant materials documenting the pre-Presidential careers of the President and family history; arranges archival storage and control for materials outside archival custody.
- Plans and administers a program for the acquisition of personal papers of Carter staff, associates and family members for eventual deposit in the Carter Library. Incumbent identifies and contacts prospective donors, advises them concerning the distinctions between personal papers, Presidential papers, and official records of Federal agencies; develops the necessary legal instruments to accept the materials on behalf of the Government; and establishes restrictions on use pertinent to the materials.
- Incumbent plans and implements an orderly, secure, and efficient transition at the end of the Carter Presidency of all permanently valuable Presidential materials, coordinating the activities of White House Staff members, National Archives and General Services personnel, security personnel, and others involved in the relocation operation.

II. Factor Descriptions

1. Knowledge Required by the Position

- Fully developed professional knowledge of the archival profession and archival administration at the highest professional level.

- Full and comprehensive knowledge of the goals, interests and purposes of the Presidential libraries system and the National Archives and Records Service.
 - Knowledge of the background and holdings of Presidential libraries, especially Presidential papers.
 - Knowledge of the laws and regulations affecting the National Archives and Records Service in general, the Office of Presidential Libraries in particular, and access to donated historical materials, national security classification, Freedom of Information Act, Privacy Act and related topics.
2. Supervisory Controls. With only general guidance from the Assistant Archivist for Presidential Libraries and his deputy, Incumbent plans and develops work priorities and has full responsibility for the execution and effectiveness of his program. Work is supervised only in terms of program reviews to measure effectiveness of programs for the future Presidential library and services to the current administration.
 3. Guidelines. Guidelines include laws and regulations governing Presidential libraries, classification of national security materials, Freedom of Information, Privacy and related issues, the Presidential Libraries Handbook, and archival standards. Incumbent interprets and implements these guidelines independently with only general guidance from the Assistant Archivist for Presidential Libraries or his deputy.
 4. Complexity. Assigned duties cover a broad range of archival responsibilities and consist of many independent program functions. Factors and conditions vary widely and must be resolved through a fully developed archival knowledge at the highest professional level and unusually critical judgment concerning appropriate work methods and approaches to varying conditions.
 5. Scope and Effect. Work affects the design and success of archival programs for the future Presidential library including effective planning and implementation of programs dealing with archival control of the location and content of Presidential materials, effective planning and implementation of programs dealing with solicitation and preservation of textual and non-textual historically valuable materials relating to the Presidency, planning and initiation of oral history programs, and contributions to the effectiveness of the Library's site and building.
 6. Personal Contacts. Personal contacts are with the Archivist of the United States and other officials of the National Archives and Records Service and General Services Administration; prominent officials of the incumbent Presidential administration as well as occasional

contacts with the President; members of the President's family, his friends, and associates; officials of organizations authorized to plan the establishment of the future Presidential library (university presidents, national leaders in business and professions); high level officials of Federal agencies; members of Congress and their staffs; and others.

7. Purpose of Contacts. The purposes of the contacts are to resolve over-all program issues involving the Carter Presidential Papers Staff with high-level National Archives officials; to undertake extensive and sensitive negotiations and solicitations of personal and institutional papers for deposit in the future Presidential library; to establish an oral history program to document fully the life, administration, and times of the President; to secure the advice, counsel, and support of the President's associates in developing the facilities and services of the future library; to provide assistance and advice to officials planning the establishment of a Carter Presidential Library; and to provide archival and other services and assistance to offices in the White House and Federal agencies.
8. Physical Demands. Sedentary work. The job requires that incumbent will be frequently on travel status.
9. Work Environment. Work is performed in an office setting.
10. Supervisory Responsibilities. Supervises a staff of approximately five (archivist, GS-13; archivist or historian, GS-12; archivist, GS-11; an archives technician, GS-4/6; and a secretary, GS-5). Plans, assigns, and reviews work based on priorities, requirements of the assignments, and individual skills. Evaluates performance, resolves disciplinary problems, and provides advice on technical and administrative matters.

*White House during
Nixon administration*

I. Introduction

Incumbent manages the Nixon Presidential Materials Staff and White House Liaison Staff under the Office of Presidential Libraries and is responsible for program planning, formulation and implementation of policies and procedures, and professional direction and administrative supervision of all programs and activities of the Staffs. For the Nixon Staff, this includes insuring compliance with the provisions of the Presidential Recordings and Materials Preservation Act (P.L. 93-526), regulations drawn up in accordance with that Act, other Federal laws and regulations pertaining to public access and preservation, and any court orders, injunctions, or other judicial proceedings. The White House Liaison Staff, this includes insuring that the current Presidential administration complies with the provision of the Presidential Records Act of 1978 (P.L. 95-591) and the Presidential Libraries Acts of 1955 (P.L. 84-373) and 1986 (P.L. 99-323) and any subsequent laws, rules, or regulations relating to Presidential records and the establishment of Presidential libraries.

II. Major Duties

--Defines overall work to be accomplished by both Staffs to assure achievement of specific policies and objectives. Plans and assign work based on priorities, difficulty and requirements of assignments. Performs the administrative and supervisory functions of planning staffing needs; counseling personnel on standards of conduct and performance, hearing and resolving complaints; handling grievances; selecting personnel; ensuring equal employment opportunity; providing career counseling; identifying, providing, or making provision for developmental and training needs; and fulfilling the overall personnel management responsibilities of a Federal manager.

--Plans, develops, and directs programs and activities of the Nixon Presidential Materials Staff including archival processing, reference service, and public access to the materials.

--Plans, directs, and reviews archival processing programs of the Nixon materials including tape preservation and reproduction and the screening and arrangement of textual materials. Evaluates work programs in terms of their effectiveness and compliance to laws and regulations. Develops long-range and annual work plans, goals, and objectives for processing the materials. Oversees the separation of private and non-historical materials and the identification and evaluation of material that raises

significant issues or that will have far-reaching precedential value. Refers these issues to internal and external review panels (Senior Archival Panel and Presidential Materials Review Board). Provides support to and coordination of reviews by these panels.

--Assures adherence to regulations restricting access to the Nixon materials on grounds of national security and privacy and controls special/limited and public access to material related to abuses of Government power or of general historical significance according to regulations. Monitors compliance with the system of notification of affected parties and the public in accordance with regulations issued in 36 CFR 1275.

--Serves as a spokesperson for and the agency's primary contact with the news media on the history of the Nixon materials, status of litigation, and procedures and regulations concerning access.

--Directs the White House Liaison Staff in planning for future Presidential libraries. The Staff is responsible for long-range planning and the identification and coordination of archival and records management activities to secure comprehensive documentation of the presidency. Serves as liaison for the Archivist of the United States and the Assistant Archivist for Presidential Libraries with White House Staff members.

--Develops and implements programs for archival control over Presidential materials from origination in staff offices to placement in the future Presidential library. Provides information to records creators in the White House Office on proper archival techniques through oral presentations and written guidelines, arranges for periodic retirement of noncurrent records to NARA, and coordinates reference services for materials transferred to NARA storage.

--Coordinates requests for archival and records management services from various offices in the Executive Office of the President and provides general information about the operation of NARA. Provides appraisal and/or referral services for the evaluation of records of Presidential commissions, task forces, advisory boards, and other units of the Executive Office of the President.

--plans for a program to acquire the personal papers of Presidential staff members, associates, and family members of the President for eventual deposit in the library. Identifies and contacts prospective donors, advises them concerning the distinctions between personal papers, Presidential papers, and Federal records; develops legal instruments to accept the materials on behalf of the

Government; and establishes restrictions on use of the materials.

--Develops building, site, and program recommendations for the future library, integrating archival expertise, experience, and goals with the President's objectives for the institution. Coordinates and maintains effective relations with various private organizations and Government officials working toward the establishment of the library. Advises private organizations concerning legal and legislative steps necessary for the establishment of a Presidential Library and works with legal counsels and Congressional staffs to develop the required legal instruments and legislation.

--Plans for the orderly, secure, and efficient transition at the end of the administration of all permanently valuable materials, coordinating activities of White House offices, NARA personnel, security personnel, and others involved in the relocation operation.

III. Supervisory Controls

With general guidance from the Assistant Archivist for Presidential Libraries and his Deputy, incumbent plans and develops work priorities and has full responsibility for the execution and effectiveness of his programs. Incumbent has direct responsibility for keeping the Archivist of the United States and the Assistant Archivist for Presidential Libraries, or their Deputies, informed of the activities and plans of the Staffs, as well as of potential problems, issues, or situations which may cause embarrassment, damage, or unfavorable publicity to any individual, institution, or the National Archives and Records Administration. Work is supervised only in terms of program reviews to measure effectiveness of programs.

IV. In performing the duties of this position, incumbent will come into contact with and have access to security classified information and materials up to and including the Top Secret level.

POSITION DESCRIPTION (Please read instructions on the back)

2. Reason for Submission ☐ Redescription ☒ New ☐ Reestablishment ☐ Other		3. Service ☒ Hdqtrs. ☐ Field		4. Employing Office Location St. Louis, MO		5. Duty Station Washington, DC		1. Agency Position No.	
Explanation (Show any positions replaced) 456-17560		7. Fair Labor Standards Act ☒ Exempt ☐ Nonexempt		8. Financial Statements Required ☐ Executive Personnel Financial Disclosure ☐ Employment and Financial Interests		9. Subject to IA Action ☐ Yes ☒ No		5. OPM Certification No.	
10. Position Status ☐ Competitive ☒ Excepted (Specify in Remarks) SES (Gen.) ☐ SES (CR)		11. Position is: ☐ Supervisory ☐ Managerial ☒ Neither		12. Sensitivity ☐ 1-Non-Sensitive ☒ 3-Critical Sensitive ☐ 2-Noncritical Sensitive ☐ 4-Special Sensitive		13. Competitive Level Code		14. Agency Use	
15. Classified/Graded by		Official Title of Position		Pay Plan		Occupational Code		Grade	
a. U.S. Office of Personnel Management									
b. Department, Agency or Establishment		Presidential Diarist		GS		1001		13	
c. Second Level Review									
d. First Level Review									
e. Recommended by Supervisor or Initiating Office									
16. Organizational Title of Position (if different from official title)				17. Name of Employee (if vacant, specify)					

18. Department, Agency, or Establishment National Archives & Records Administration		c. Third Subdivision	
a. First Subdivision Office of Presidential Libraries		d. Fourth Subdivision	
b. Second Subdivision		e. Fifth Subdivision	
Employee Review—This is an accurate description of the major duties and responsibilities of my position.		Signature of Employee (optional)	

20. Supervisory Certification. I certify that this is an accurate statement of the major duties and responsibilities of this position and its organizational relationships, and that the position is necessary to carry out Government functions for which I am responsible. This certification is made with the knowledge that this information is to be used for statutory purposes relating to appointment and payment of public funds, and that false or misleading statements may constitute violations of such statutes or their implementing regulations.	
a. Typed Name and Title of Immediate Supervisor JOHN T. FAWCETT, Assistant Archivist for Presidential Libraries	b. Typed Name and Title of Higher-Level Supervisor or Manager (optional) DON W. WILSON, Archivist of the United States
Signature 	Signature
Date JUN 30 1988	Date JUN 30 1988

21. Classification/Job Grading Certification. I certify that this position has been classified/graded as required by Title 5, U.S. Code, in conformance with standards published by the U.S. Office of Personnel Management or, if no published standards apply directly, consistently with the most applicable published standards.		22. Position Classification Standards Used in Classifying/Grading Position	
Typed Name and Title of Official Taking Action WILMA J. KRIVISKI, Director, Personnel Services Division		Information for Employees. The standards, and information on their application, are available in the personnel office. The classification of the position may be reviewed and corrected by the agency or the U.S. Office of Personnel Management. Information on classification/job grading appeals, and complaints on exemption from FLSA, is available from the personnel office or the U.S. Office of Personnel Management.	
Signature 	Date JUN 30 1988		
23. Position Review	Initials	Date	Initials
a. Employee (optional)			
b. Supervisor			
c. Classifier			

PRESIDENTIAL DIARIST POSITION**DUTIES**

Analyses source documents, including the Oval Office Log, President Briefing Papers and Schedules, Presidential Movement Log, Telephone Logs, Schedule Proposals, White House Releases and Announcements, photographs, and passenger manifests to obtain information for preparation of the the Daily Log of the President of the United States. Working with a variety of offices within the White House Office organization as well as outside sponsors of events in which the President participates, procures information not contained in usual source documents or to confirm their content.

Compiles the Daily Log of the President's activities from information gained. In accepted format develops chronologically all activities of the President's day; including incoming and outgoing telephone calls, meetings, briefings, visitors, travel etc. Identifies site, persons involved, length of contacts, subject matter or purpose of contacts etc. Inputs analysed data through IBM Personal Computer XT.

Manages statistical breakdown of the use of the President's time, for use by the Chief of Staff.

Prepares finding aids such as the Presidential Confirmed Block Calendar.

Performs frequent, difficult and complex reference service in response to written and oral requests from the White House Counsel's Office, Press Office, Office of Legislative Affairs, the National Security Council, Office of Public Liaison and other Assistants to the President. As the only central and complete source of information on the President's activities, compiles specialized reports such as summaries of the President's involvement in particular issues or comparative analyses of his contact with interest groups.

Assists White House Photo Office in identifying and locating photographs. Reviews and analyses for completeness and accuracy the Digest of Other White House Announcements included in the Weekly Compilation of Presidential Documents (NARA, Federal Register) prior to publication of the Public Papers of the Presidents.

KNOWLEDGE REQUIRED BY THE POSITION

Specialized knowledge of what information is to be included in the Daily Log of the President of the United States activities and related documents. An ability for detail and thoroughness is essential.

High level of knowlege of the organization and functions of the White House Office, Cabinet Departments and other Federal agencies to procure and confirm information required in the President's Daily Log. A high degree of confidentiality and judgement is essential in working within the White House complex with current classified and/or sensitive recores and papers of the President of the United States and his staff.

Page 2

Knowledge of writing practices appropriate to intended archival uses of the documents.

Extensive knowledge of the Diary Computer System, including individual and subject codes, data input procedures, the IBM Personal Computer XT and STAIRS retrieval system.

Can be easily trained if have writing skills

Not nec pc only

SUPERVISOR CONTROLS

Works independent of supervisory controls. Work assignments are received in the form of source documents including logs, schedules, briefing papers, agenda, participant lists, and gate lists etc. Independently notes missing or questionable information and contacts appropriate person(s) to obtain or verify. Is expected to work solely and completely on own initiative. Completed work is reviewed by this position for accuracy, completeness and achievement of objective.

GUIDELINES

Guidelines include accepted practices in relation to usage of Presidential papers. There are few specific guidelines except for standard operating procedures within the office. Position develops such procedures including formulation of indexing codes, subject and individual codes etc. for computer input. Independent judgement is needed in determining indexing procedures, proper subject matter titles, identification of issues and in anticipating types of specialized reports which may be requested by Senior White House Staff.

COMPLEXITY

Nature of the assignment involves the management and preparation of the President's Daily Log including the review of source documentation, compilation of the entries therein, review of entries for completeness and accuracy of information, obtaining necessary additional information, adequately identifying entries and preparation in proper format. Relies upon knowledge of the organizational assignments, policies concerning Presidential meetings, knowledge of current events to identify matters which require additional information or confirmation. Determines probable individuals who can supply information and follows-up as needed. In some instances new and unique approaches must be developed to identify and/or contact sources and to devise meaningful formats for compiling and presenting specialized reports.

SCOPE AND EFFECT

Purpose of the work is to provide an extensive log which serves as an administrative tool in assessment and control of Presidential activities and to provide a historical record. The data compiled by this position enables Senior White House Staff members to analyse use of the President's time to improve his effectiveness. The log has proven to be an invaluable source document for White House legal matters. The log also provides a record of lasting interest for future scholarly research.

PERSONAL CONTACTS

Contacts are with co-workers within the Presidential Appointments and Scheduling Office, senior members and support staff of the White House Office, Federal Agencies, and private individuals or organizations involved in the President's activities.

PURPOSE OF CONTACTS

Contacts are for the purpose of providing and procuring information.

PHYSICAL DEMAND

Sedentary.

WORK ENVIRONMENT

Work is performed in an office setting.

December 16, 1987

*Marianne:**This description of the Johnson Diary Backup File gives some helpful ideas.*

G. A few subjects are carded, for example, Cabinet Meetings, Church Attendance, Civil Rights Leaders, Bi-Partisan Groups, Legislative Breakfasts, Ambassadors, Press, and LBJ Ranch. Countries are carded; for example, a visit from the Canadian Ambassador would be included under Canada, the subject Ambassadors, and the man's name.

H. The Diary cards are color coded by year:

1963-1964 off-white

1965 green

1966 orange

1967 blue

1968-1969 yellow

III. APPOINTMENT FILE [DIARY BACKUP]

A. As Juanita Roberts described it, the purpose of the Diary Backup was to "flesh out the diary". Her office put all sorts of material dealing with the President's schedule, his doodles for the day, notes they picked up off of the floor after meetings, clippings, and other items in a large brown envelope and sent it to Dorothy Territo. Sometimes things were put in the envelope because it was a convenient place to file them.

1. Mrs. Territo separated these items. (Doodles were placed in the handwriting file.) She put items dealing with one day together with a binder clip and filed them chronologically in gray cardboard folders. During processing at the Library, the staff refoldered the material. There is a separate folder for each day, and frequently there are separate folders for Head of State visits and for meetings or interviews with the President.
2. The file includes agenda, schedules, notes, briefing papers, memoranda, guest lists, correspondence about appointments, many White House press releases, and other materials. Although some of the items are duplicated in other files, such as White House Central Files, Diary Backup contains many very substantive documents which are not duplicated elsewhere.
3. Many of the items that went into the Diary Backup file had been a part of night reading and were intended to brief the President on his appointments.

- B. Many days are not included in Diary Backup. In 1964, very little was put in this file; many early days lack backup folders. Frequently Saturdays and Sundays and days when the President was at the Ranch have no folders.
- C. Many documents in Diary Backup contain notations.
1. A number or letter frequently appears in the top center of the page, although it is occasionally in the upper left or right corner of the page. It is usually circled or in parenthesis. These items were part of the President's night reading. Juanita Roberts' office prepared a list of the President's night reading and numbered the items. Numbers on the documents correspond to numbers on the night reading list. Marvin Watson's office prepared separate night reading, listing their documents with letters.
 2. Many items are marked with an "L" or "ps". These notations were added in Juanita Roberts' office and indicate that the "President saw" the item. It appears that they used the "L" until sometime in 1967; after that, the secretaries marked items with "ps".
- D. Diary Backup for the Vice Presidential years measures approximately one and a half linear inches. This file consists mainly of notes and telephone messages given to Vice President Johnson. There is no Diary Backup for the Senate years.

THE WHITE HOUSE
WASHINGTON

January 21, 1993

MEMORANDUM FOR MARCIA HALE,
DIRECTOR, PRESIDENTIAL SCHEDULING AND
ADVANCE

FROM ELLEN W. MCCATHRAN, *EWMC*
PRESIDENTIAL DIARIST

SUBJECT PRESIDENTIAL DIARY

I have compiled information providing background to the Presidential Diary operation and recommendations for support of the project.

I. Purpose

- A. Background
- B. Sources

II. Recommendations

I. Purpose

rarely happens now
The Daily Log of the President's meetings and activities is being kept by the President's Appointments and Scheduling Office. The Log is an important administrative tool for assessing the President's time and for senior White House staff members to better evaluate use of his time.

Other uses of the Daily Log include responding to press inquiries, coordination of Memos to for the President's file, preparation of briefing papers, action memos or other administration reports, and personal use by the President.

it is not complete
New
Because the Diary is the only complete source of information on the President's activities, absolute accuracy and completeness are imperative. Because there is no distinction between personal and/or private, or official classified activities, access is limited to a "need to know" basis. To ensure control of the Diary information, only the personal computers in the Diarists Office can access the information. Historically access to Diary information has been limited to the Chief of Staff, the Director of Scheduling, and the President's Personal Secretary. The Diarist responds to their inquiries personally.

Met its main purpose
With the increasing demand for accountability, the Log has proven to be an invaluable source document for White House legal matters.

THE WHITE HOUSE

WASHINGTON

A. Background

Former Presidents Johnson, Nixon, Ford, Carter, Reagan and Bush had comprehensive logs of all activities, including incoming and outgoing telephone calls, visitors, meetings, conferences, recreational and social activities, travel kept by various people and offices during their administrations. During the Ford administration, the Log was primarily for the President's personal use in recalling events or for planning future activities. All requests were responded to with manual methods of information retrieval. Under the Carter administration, the Diary was adapted for an on-line computer system, created by the Diarists and implemented by the White House Communications Agency (WHCA). During the second term of the Reagan administration, a computer system was tailor made for the President's Diary, on a secure LAN networking system. The Diary is printed on a Hewlett Packard Laser Jet IIID printer. *put data Equip*

B. Sources

The source documents obtained for preparation of the Daily Diary are the key in compiling an accurate, complete and reliable log.

Source documents including an Oval Office Log, Presidential briefing papers and schedules, Secret Service Movement Logs, Telephone Logs, White House Usher's Logs, Event Gate Lists, F1 Logs, and passenger manifests for Marine One Helicopter and Air Force One. It is also necessary to contact the Project Officers, as well as outside sources, such as sponsors of events in which the President participates, to obtain information not contained in usual source documents, or to confirm their content.

II. Recommendations

* The Oval Office Log of arrivals and departures of visitors and staff is the Core for compiling the Diary. The Office Office Log should be maintained by the civilian aide to the President, with backup support by the President's Personal Secretary. During the Bush administration, this task was the responsibility of Bill Farish and Nancy Huang. Because they were positioned outside the Oval Office, they had the advantage of knowing and documenting the exact time an individual enters the office and departs, what time a meeting starts and finishes, and when a meeting is canceled or added to the President's schedule. This Log should include the name of the individual seeing the President; their official business title and purpose of the meeting, and staff member escort or Project Officer for the meeting. Any additions or deletions of participants from the schedule and briefing papers should be duly noted.

The Log should include the times in which individuals arrive and leave, the beginning and ending times of the meetings. All participants should have an in and out time of their meeting, including White House staff members. Any changes in the

President's location should be indicated; even from Oval Office to study. In addition, because the personal aide will be with the President when he travels, they should keep the log of out-of-town events and activities. The Military Aide traveling with the President can serve as a backup for this function if necessary, making annotations to the official trip book.

It is recommended that these procedures be implemented at the very start of the Clinton administration to ensure maximum efficiency and accuracy in the development of the Diary.