

July 20, 1993

To: David Watkins, Assistant to the President for Management and Administration

From: John Daly

In this binder you have a summary of the findings of our customer interviews.

The summary is divided into five major parts:

- a. A brief summary of the major findings.
- b. A collection of principles about customer service that guided our work.
- c. A list of seven general recommendations for all OA offices in terms of bolstering service.
- d. An extensive summary of customer concerns and recommendations about resolving those concerns.
- e. In an appendix, a summary of the recommendations in list form.

This is the fourth report we have given you. The first had to do with the OEOB. It focused on signage, maps, and small items like the WAVES card. Many of the recommendations are in the process of being implemented. Some are again summarized here for reasons of completeness. The second had to do with management issues. The third had to do with visiting the White House complex. Again, portions of those recommendations are included in this report.

My general impression is that there are numerous opportunities for service wins within the EOP. Many of the specific recommendations are easily accomplished and will have lasting effect. Obviously, there are some recommendations that will need careful consideration since they involve staffing concerns and large budget commitments.

The process of interviewing your customers has been a good one for both them and us. More than three-fourths of the people we interviewed expressed distinct pleasure in someone coming to ask them about their concerns. You should be complimented on the decision to conduct the interviews.

Finally, I must note the very substantial help Jennifer O'Connor provided throughout the process. She was, and is, great. In addition, Ashley Raines and Barbara Walker did extraordinary work to get this report finalized.

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Clinton Presidential Records Digital Records Marker

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Summary of Concerns

Divider Title: _____

Summary of Key Concerns from Interviews

WAVES Fails to Meet People's Expectations

- Any number of people fail to be cleared.
 - even when offices have sent their names in days before.
 - even when offices have called and confirmed.
- WAVES uses antiquated technology.
- The pass system for visitors doesn't work for regular visitors or ones with multiple appointments in the complex.

Uniformed Officers are Poor at Public Relations

- Officers are often perceived as unfriendly, negative, and unhelpful when greeting or clearing people into the Complex.
- Invited VIP guests are often not greeted.
- Officers behaviors are inconsistent--one day you can enter a gate; another day you can't.

Telephone Equipment and Services are Unacceptable

- Most people do not have the sorts of telephone options they want or need.
- Everyone wants voice mail.
- People want a short list of important numbers (a pull out sheet).

- People want a directory that includes the fax numbers of staff members.
- There is a real need for more pay phones.
- The VP wants a better phone on Air Force 2; the President wants an on-off switch for his phone so it can ring in the Oval Office.

Telephone Etiquette is Weak or Missing in Many Offices

- Eight senior staff members felt that people answering phones are impolite, even rude.
- Three senior staff members noted that frequently people fail to return phone calls.

There are "Ambience" Items People Want in the West Wing

- Coffee pots in different locations throughout the West Wing.
- Coffee available in West Wing all the time (Sundays, early morning).
- Earlier delivery of major newspapers (bulldog of Post, early copy of Times and Wall Street Journal).
- Umbrellas and awnings need to be installed.
- One West Wing staff member would like a "runners" service (to do small errands).
- There should be more plants within the West Wing and the OEOB.
- More vending machines in the West Wing for when the Mess is closed.
- There needs to be more flexibility with cars and drivers (e.g., for Hill meetings they wait only so long, they won't drive you home from airport even if home is on the way back to White House).

The Amount of Meeting and Conference Space Available in the Complex is Unacceptable

- Interviewees have difficulty finding rooms in which to hold important meetings.
- There is no priority system for meetings (staff meetings, which could be held anywhere, use valuable public rooms).

A White House Conference Center Should Be Established in Jackson Place

- There is no place "off-site" but nearby for meetings.
- There is no place to hold extended meeting and conferences.

Meeting Planning Needs Improvement

- There is little coordination about the set-up or management of meetings.

Garnering Information about Services is Difficult

- Many staff members have difficulty discovering how to do any number of tasks within the White House.
- Often, people don't understand some White House operations (e.g., the difference between Signal and the White House Operators).
- Many times, staff members don't know who to talk with in different offices about different issues.
- Some people are unsure about rules of appropriate behavior (e.g., going through Residence to East Wing, using the Official Photographer).
- Most interviewees want a Directory and Organization Chart. The individuals responsible for scheduling top staff members should also be listed.

- They also want a Staff Manual distributed to all offices.

Electronic Mail is Weak

- People expect a system far better than the current one.
- Not everyone's computer is even wired for OASIS.
- Some Departments want their computer systems integrated with OASIS (e.g., NSC, CEA).
- There should be direct links with Cabinet offices.

People Need Better Technology Support (Hardware & Software)

- Many people perceive the White House as not on the "cutting edge" of technology. They want more and better software and hardware.
- Single biggest requests are for database software and macros for frequent tasks and often used forms.
- In the long run, there is a desire for better records management and retrieval (instant retrieval of correspondence), scanning technology, and electronic commenting (e.g., LOTUS NOTES).
- Major hardware requests include more 486s and laptops.
- Some offices need LANs.

Computer Services Must Become More Customer Oriented

- The Division is not perceived as customer centered.
- Training needs to be better and more accessible.

Many Support Services are Not Customer-Centered

- Services are not proactive; the "squeaky wheel" gets the attention.
- Personnel services are weak: employees are unclear about their benefits; mistakes have been found in income statements.
- WHCA, for constitutional reasons, is limited to serving the President. Consequently, other senior offices (First Lady, Vice President) find their "WHCA-like needs" are not sufficiently met.
- Travel reimbursements take too long.
- It is difficult to deal with so many different offices for services.

Offices Don't Treat Other Offices Like Customers

- There is poor coordination among some offices about briefing materials, policy issues, and procedural matters.
- Some interviewees complained that people don't communicate with each other before doing activities.
- People don't know what is going on in other offices; they don't know the issues that they may have to deal with later.
- Four senior people complained about not knowing schedules of other offices. They don't know about public briefings held by other offices.
- Working with other offices is frequently too much of a "hassle."
- One senior official complained that she didn't know how to comment about materials that get "included" (e.g., how does something get put in the Briefing Book).

The Volunteer and Intern Programs Need Consistency and Better Development

- The quality of volunteers is inconsistent; their reliability questionable; their skills variable.
- Given the importance of volunteers, the organizational support for the program is weak.
- Offices fear the end of intern programs.
- Intern badges need to be reengineered.
- Both volunteers and interns need some basic training on skills such as telephone etiquette.

The Visitors System for Tours is Weak

- The process is not as good as it could be.
- The signage is weak or non-existent.
- The Visitors' Center is dirty and unkempt.
- Gate appearance is lousy.

Visitors (both Public and Invited) Need Something to Take With Them

- Congressional tours have no written materials.
- Invited guests get no "memory" items.

Event Planning for Social Activities is Poorly Scheduled

- Schedules of social events and of appearances by top people are not determined early enough.
- Some offices have too many "last minute" events.
- Invitees get stuck at the entry because there is no one there who knows them and can clear them into the event.

Mail is Not Always Delivered Promptly or Thoroughly

- Three offices thought that it takes too long to get external mail to offices.
- Internal memos are not always distributed.
- Messenger deliveries are not always done effectively.
- Some people overuse the red dot system.

Senior Staff Members Feel They Need More Secretarial Support

- Because of the staff shortage, a number of senior people are doing secretarial work.
- Personnel assigned as secretaries are not really secretaries--they don't know dictation or transcription skills.

Staff Members are Not Well Trained on a Variety of Important Skills

- Any number of interviewees lamented the lack of management related training.
- People also wanted special skills training (e.g., time management).

Administrative Contacts Within Offices Want More Attention

- Administrative contacts want a regular meeting with Watkins' office.
- They want both information and a chance to be heard.

Offices Want their Own Budgets

- Three offices want a better sense of what they have to spend. They want to make their own decisions.

There is No Service Center for White House Employees to Enjoy Washington

- The White House should explore creating an "employee recreation association" to negotiate "bulk" contracts for various activities in Washington.
- We should be able to arrange special tours of different D.C. attractions.
- There needs to be an activities coordinator.
- There should be a White House lecture series.

People Need More Non-Computer Equipment

- People need photocopiers in their offices (e.g., Paster), more FAX machines (e.g., Herman), cellular phones (VP Office, Herman).
- More public phones need to be added in the OEOP.

There is No General Employee Orientation Program

- People want an orientation program for employees that would cover basic issues everyone should know about.

GSA is Seen as a Poor Service Provider

- Bathrooms in the OEOP are dirty and not suitable for handicapped.
- Repair services (e.g., air conditioners) take too long.
- Personnel are not careful with equipment (e.g., moving furniture).
- The quality of services is not good, especially given their cost.

Some Offices (Mostly on the First Floor of the OEOP) are Dirty and Cluttered

- Some look like college dorm rooms.
- They are messy, unkempt, and embarrassing.
- If you can't keep them clean, close the doors.

The OEOP Cafeteria Does Not Satisfy People

- It is environmentally a problem (e.g., styrofoam plates).
- The quality of food is poor.
- People do like the change in operating hours.

The OEOP is a Difficult Building Within Which to Work

- Elevators are slow.
- Building is leaky.
- Signage is non-existent.

Some Services Get Great Reviews

- The White House Mess staff gets constant compliments.
- The Supply Office gets regular compliments.
- Facilities gets compliments on Sig.
- The Secret Service will escort people to cars at night.
- The leadership of the Watkins' office (Watkins, Thomasson, O'Connor) solves problems well.

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Service Scorecard

Divider Title: _____

Key Concepts for Presidential Quality Service

Services within the EOP must meet or exceed customer expectations.

Accessible: In outstanding service organizations, people can find what they need easily. People in the EOP can't find or get to people who seem to have information, decision-making authority, or solutions.

Attentive and Responsive: You have to constantly pay attention to the changing needs of your customer and then respond with speed to those needs. The perception within the EOP is that offices are not as responsive as many people would like. No one pays attention to many of the small things that would make everyone's life better.

Careful: Great service organizations follow-up. Offices in the EOP do not follow up to ensure that things get done. Even when they do get done, there is no systematic way of assessing customer satisfaction with what was done.

Competent: Great service exudes competency about product, processes, services, and people. Within the EOP, perceptions of service competence varies from office to office. Not every office is seen as highly competent at what it does.

Competitive: Outstanding service organizations compete with each other. They know what their competition is doing and they do better. They constantly imagine what a competitor would need to do to take their business away from them. And then, they do those things themselves. Offices in the EOP don't imagine a competitor, don't measure themselves against other organizations.

Consistent, Reliable, and Dependable: Critically important to service is a sense of reliability. People in the EOP complain of the inconsistent, almost random, ways they are treated by certain service agencies.

Customized: In today's world people anticipate customized service. One size fits all just doesn't work any longer. In the EOP, people often feel that nothing is customized for them. If it is to be customized, they usually do it themselves.

Easy to Use--No Hassle Service: Everything should be easy for the customer. They should not have to work to get great service. In the EOP many people think they have to work too hard to get what they need.

Feedback Centered: Service means seeking information about how you are doing so that you can continually do better. EOP service offices do not collect feedback about how they are doing from their customers.

Focused and Purposeful: Everyone must have a strong and relentless sense of purpose--why they are doing what they do. Within the EOP there is a sense among many that there is not a highly focused sense of purpose--who are we serving, and why, are questions people often ask.

Informative: Good service is highly informative. People in the EOP don't know what is available to them; they don't know "the questions to ask."

Marketed and Valued: Great service is marketed just as a product is sold. Most offices do not think of their role as "selling" their services to other parts of the EOP. Consequently, people don't use their services (e.g., Correspondence doesn't think they are valued), nor are they proud when people use their services.

Measured: What gets measured, gets done when it comes to service. Great service organizations have standards they set for every office when it comes to service. EOP offices do not measure their success at providing services. They don't know how long it takes to respond to requests from their customers. They don't know the relative frequency of problems.

Positive: Service is marked by optimism, excitement, and a sense of generosity. People in EOP service jobs don't have an attitude of "Can I help you?" Instead, the attitude seems to be "why are you hassling me?" and "We're doing you a favor."

Proactive: Great service solves problems before they even happen. There is a strong perception that some EOP service agencies within OA and GSA are reactive. They don't seek out problems or imagine future solutions; instead, they respond to complaints.

Process Centered: Exceptional service normally involves different offices working together to create an experience for the customer. Breaking down divisional walls, working as teams focused on a critical issue, is often essential to great service. EOP departments are not always as issue, process focused as one might like. Instead, the emphasis appears to be on departments and divisions.

Works for Surprise: The best service organizations try to regularly exceed the expectations of their customers. They surprise them with doing more than they expect. Very few offices in the EOP get good grades on this (exception: the service in the White House Mess).

Scorecard for Presidential Quality Service

Criteria	Score
Accessible	
Attentive and Responsive	
Careful	
Competent	
Competitive	
Consistent, Reliable & Dependable	
Customized	
Easy to Use--No Hassle Service	
Feedback Centered	
Focused and Purposeful	
Informative	
Marketed and Valued	
Measured	
Positive	
Proactive	
Process Centered	
Works for Surprises	

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General OA Recommendations

Divider Title: _____

Some Specific Recommendations for All OA Offices

(1) Each office needs to create a customer centered "Bill of Rights" defining specific standards personnel in that office believe can be met and exceeded. This document serves as a "guarantee" to customers.

Ground rules:

- the promises must be specific
- the promises must be measurable
- the promises must be realistic
- the promises must be public (circulated to customers)

(2) Each office needs to create two to three customer-based measures that they can use to determine their success in providing outstanding service.

- These measures must be tracked on a monthly basis.
- The measures must focus on outcomes important to the client.
- Score must be reported to Watkins' office

(3) Each office needs systematic training in customer service. A one day program on service that should be attended by everyone in the office would be appropriate. Half the day should be an introduction to customer service; the second half should be a workshop on service where individual offices devise service strategies. In the workshop portion, offices would create a customer "Bill of Rights" (e.g., "All phone calls will be returned before the end of the day." "If we can't fix the problem by the end of the day, we'll call you each day until it is fixed." "We will always tell you our names and numbers if you call us about a problem."), devise measures of service (number of days after a problem call until resolution, customer satisfaction rating), and create a service marketing strategy.

(4) Each office needs to start collecting stories of service wins and successes. The goal is to start creating "legends and myths" about service throughout OA. These should be submitted to Watkins' office for distribution. People should be recognized for outstanding service via letters, reports to the Chief of Staff, and memos to other offices about great service.

- Each office director would be responsible for submitting names and stories of outstanding service to Watkins' office. The names and stories may be about people within the office or other offices within the EOP. Copies of these letters are sent to the employee and, where appropriate, to the employee's manager. It is critical that the stories identify specific actions that were customer service wins. Watkins reviews materials submitted and selects those which exemplify the best in service. Watkins forwards, under a cover letter from him, the

memo to the Chief of Staff or Deputy. A copy of the cover letter is sent to the employee and his or her manager.

(5) Each office needs to systematically interview a sample of its customers about their needs and wishes. During the interview, each office should also review what it can do for the customer. These "client calls" must happen at least every six months. The heads of each major department the office serves should be interviewed yearly. The types of "client" visits will differ depending upon the office. For instance:

- The personnel office needs to have periodic client calls with each employee going over such things as benefits, pay, and pension information.
- The computer services division needs to visit each office to discover new computer needs. The division should seek information, and provide advice about, computation needs. In essence, this office ought to be a "solution center" for information processing.

(6) Each office should devise a service marketing strategy. This strategy might include market identification, media development (e.g., brochures---such as the one produced by the Library), office visits, memos, telephone calls), scheduling, and implementation.

(7) OA should schedule an internal "trade show" where each office displays its skills, equipment, and services for all other offices in the EOP. The trade show will show what each office can do, distribute useful information and materials to attendees, and highlight special characteristics, skills, and competencies of each unit.

Creating An Exceptional Service Recognition Program

Watkins asks each Department under him to start collecting service stories.
- Each story must be about a specific service encounter where a staff member or members "went above and beyond" in providing some service to someone or some group.
- Each office is asked to provide at least one story, and no more than three, each month.
- Each office submits stories on the last day of the month.
- Each office is also asked to discover stories about any other office within the EOP that provided exceptional service.
- Those stories are also submitted on the last day of each month.
- One assistant within Watkins' office is appointed to manage this exercise. He or she is responsible for reminder notes, collating submissions, coordinating meetings, etc.
- Watkins' office reminds each Department to submit stories on the 20th of each month.
- Watkins, Thomasson, O'Connor, and two people from outside of the Office of Management and Administration (two "names;" there should be different people each month) read over all stories and identify the most exceptional case. It is possible that no story is seen as particularly exceptional.
- Watkins writes brief "thank you" notes to all nominated individuals or groups.
- Watkins writes a special letter to the individual or group described in the story that is deemed most exceptional by the panel. That letter is forwarded to the President who will, we hope, write a brief comment himself. After he sees it, it is framed and presented to the individual or group.
- A brief summary of the "exceptional service" story is written and distributed to all.
- At the end of each year there is an "all hands" meeting for all offices under Watkins' aegis. At that meeting every "winner" is recognized publicly by Watkins, the Chief of Staff, and other top leaders. Watkins relates each story during the ceremony.

Customer Service Training Modules for Offices

Two half day training programs are offered to each office reporting to Watkins. Sessions are taught by Daly	
Session I:	
- This is an overview of customer service in the White House.	
- Participants learn the major components of service (see section "Key Concepts of Presidential Quality Service").	
- The number of people attending session can be of any size.	
Session II:	
-This is a workshop of service for individual offices.	
-Each office meets individually with Daly to:	
a.	Review findings of customer interviews done during June-July 1993.
b.	Create a "customer bill of rights" for service initiatives
c.	Devise two to three measures of customer service that are customer-based and measurable. The scores on these measures will be submitted to Watkins on a monthly basis.
d.	Plan a service marketing strategy for the office. This includes material on customer interviews, market identification, competitor analysis, and implementation.

Conducting An Internal Trade Show

Each office identifies:
-its customer base (who do we serve)
-its mission (what does the customer use our services for)
-its tools, techniques, procedures, and products
-its innovations (what do we have that we want the entire organization to know about)
-the innovations must be usable immediately by other offices and units. The innovation must have been tried and successfully used already.
Each office creates one or more exhibits describing their functions, services, products, and innovations.
A memo is circulated to every one in the EOP about the upcoming show or demonstration.
A central physical location for the EOP (e.g., OEOP cafeteria) is identified and the exhibits are displayed there for a two to three day period of time. Written material, software, even video material is appropriate.
The Chief of Staff, Deputy Chief of Staff, and other top Administration leaders make it a point to walk through the exhibits.

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Specific Issues

Divider Title: _____

WAVES Fails to Meet People's Expectations

- It does not work well today; 75% of respondents complained about it
- The system currently is undependable and filled with hassles and opportunities for error; several clearances "fall through the cracks"
- There is a lack of special or even appropriate treatment for VIP visitors
- WAVES uses antiquated technology. There is an inefficient use of technology and human resources within the current system
- Any number of people fail to be cleared.
 - even when offices have sent their names in days before.
 - even when offices have called and confirmed.
- The pass system for visitors doesn't work for regular visitors or ones with multiple appointments in the complex.
- Short-term "fixes" such as those underway (list) will have limited success within the current system
 - WAVES Card for EOP Employees
 - WAVES Rolodex Card

- Headsets for WAVES Operators
- Better Lighting for Entrance Officers
- "Getting to Your Appointment" Brochures
- Information Packets on Arranging Meetings for Visitors and EOP Staff
- More Telephones at Entrances for Visitor & Staff Use

Recommendations:

(1) Mr. Watkins should meet with Ron Noble (Treasury) to explore options for funding WAVES improvements:

- Modify/replace relevant OASIS, WAVES, and law enforcement system software and hardware to improve system interfaces and install appropriate safeguards.
[est. cost \$250-\$300k]
 - a. Modify the OASIS/WAVES interface to allow data to be entered once through OASIS and not subsequently rekeyed.
 - b. Modify interfaces between the WAVES system and the law enforcement systems (WALES/NCIC) to perform security checks without rekeying data or manually transferring disks.
- Move the WAVES Operation to larger and more compatible space. [est. cost \$50-\$100k]

(2) Install equipment at entrances to improve communication between entrance posts and WAVES, and between posts and key White House offices.

- Install drop lines from entrance posts (OEOB 17th Street and Pennsylvania Ave. entrances, and Visitors Center) to WAVES. [est. cost \$1500]
- Install a VIP drop line from NW and SW gates and Visitors Center to the Office of Management and Administration (or Immediate Office of the President). [est. cost \$2000]
- Install a fax machine at the Visitors Center and upgrade printing capability to allow for processing of large lists. [est. cost \$3000]
- Convert the "portable" WAVES node in the Visitors Center to a permanent fixture. [est. cost \$300]
- Add ports to the NEOB & OEOB entrances to allow for hook-up of portable (temporary) WAVES nodes during heavy use. [est. cost TBD]

(3) Institute procedures for WH/EOP staff to greet large groups and VIPs at entrances to ensure proper treatment of guests and adequate human resources to handle problems.

- Issue a rule mandating that an office sponsoring a large event or welcoming VIPs will provide a permanent staff member at each gate during the appropriate time to facilitate entry.

- Continue efforts to educate WH/EOP staff on proper entrance procedures (including the appropriate use of volunteers and interns) to reduce the number of mishandled clearances.

(4) Mr. Watkins should explore with Secret Service adding flexibility to the clearance process.

- Build in a "day pass" capability.
- Allow for "carry over" clearance between buildings.

Uniformed Officers are Poor at Public Relations

- Officers at the various entrances provide visitors with their first and last experiences at the White House. Everyone coming to the White House thinks of themselves as a VIP. Many officers assigned to gate functions do not have a strong sense of public relations.
- Officers are often perceived as unfriendly, negative, and unhelpful when greeting or clearing people into the Complex.
- Invited VIP guests are often not greeted.
- Officers behaviors are inconsistent--one day you can enter a gate; another day you can't.
- Many interviewees focused on the officers' indifferent attitudes at gates to the White House complex. They were seen as:
 - lacking in sensitivity ("cold," "rude," "aloof," "unfriendly")
 - lacking in communicative skills ("unhelpful," "non-communicative")
- People perceive officers to be rigid and unwilling to make even simple judgements ("rigid," "inflexible")
- A very limited initial survey of the greeting behaviors of officers revealed that very few times officers smiled or proactively greeted visitors at entrances to the OEOP.

Recommendations:

Option 1: Improve the behaviors and attitudes of officers at the various gates

(1) Officers must be taught, consistently, that their jobs require both a sense of security and a sense of public relations. The public relations, customer service, and communication, components need to be emphasized (e.g., For meetings in the West Wing, officers should, because of the WAVES software, know who the meeting is with. They should say to a visitor "Good morning Mr. Jones, Mr. McLarty is looking forward to meeting with you today").

(2) Mr. Watkins needs to negotiate with Ron Nobles a change in the selection, training, and evaluation of officers who work public gates.¹

(3) Mr. Watkins needs to work with Ron Noble on empowering senior officials involved in clearance of visitors to make decisions and/or acquire instant guidance on the appropriateness of admitting dignitaries. Too often, VIP's (Members of Congress, Ambassadors, members of the Joint Chiefs of Staff) have been turned away by officers unwilling to make decisions.

Option 2: For major entrances and for all special events, post a "concierge" individual at relevant gates.

¹ Issues that need to be addressed include: the lack of sufficient training in sensitivity and people skills, inadequate supervision at posts during events, a new rotation scheme which insures that many officers do not know many regular visitors, lack of regular evaluations of officers' "public relations" skills, few rewards and limited recognition for a good service attitude, and system failures (e.g., the lack of good technology at posts, WAVES).

(1) This individual would be a "greeter" for visitors helping them solve their problems. The individual would greet guests, use names, exude politeness and cordiality, and be extraordinarily good at "working the system" to aid visitors.

(2) Individual White House offices having major events or welcoming VIPs need to have a staff member on hand at the entrances to both greet guests and facilitate their entry into the event.

(3) For "important" visitors to the West Wing have office staff members, the West Wing receptionist, or military personnel serve as escort from the gate to the office the individual is visiting.

Option 3: Replace the officers operating the WAVES system at the OEOB and NEOB entrances with staff personnel trained in service skills.

(1) Officers would remain for security checks and backup.

(2) The individuals "checking" visitors in would be trained and evaluated on their communication and service skills.²

(3) The biggest problems with this option is additional staff cost.

² The State Department currently uses this option. Security personnel are present for security checks and back-ups. Full time individuals, hired for their interpersonal skills, greet and clear visitors.

Telephone Equipment and Services are Unacceptable

- This was the most frequent issue in the interviews.
- People do not have the sorts of telephone options they want or need.
- People want a directory that includes staff members' fax numbers.
- There is a real need for more pay phones.
- The VP wants a better phone on Air Force 2; the President wants an on-off switch for his phone so it can ring in the Oval Office.
- Some also requested additional equipment (e.g., headphones).
- A summary of specific requests is attached.

Recommendation:

- (1) The team tasked with implementing the new phone system must carefully interview every phone user on their preferences, typical uses, and dislikes.

(2) For each option made available to users, the team should interview some typical customers about their reactions to the option (e.g., how do typical callers feel about voice mail).

(3) Every user must be trained on the new phone options.

(4) Two months after implementation, a second survey needs to be completed. People often discover, after using a piece of equipment, additional needs.

(5) During the first four months, a regular mailing about phone system alternatives needs to be distributed to all personnel. These memos should (a) announce different options, (b) teach people how to use their options, and (c) remind users of the etiquette involved in using various options.

(6) Work with WHCA to improve the quality of phone calls on Air Force 2.

(7) Add a switch to the phone in the Oval Office permitting the President to hear his phone ring.

(8) In the phone directory include people's fax numbers and EMAIL addresses.

(9) In the phone directory, where appropriate, list a person's scheduling assistant.

Name	On-Off Button for Ringer	Sound quality on Air Force 2	Voice Mail	Confer ence Call	Speaker Phone	Intercom	Caller ID (for inside calls)	Private Line	Easy Internal Transfer	Privacy Button	Last Number Redial	Speed Dialing	Transfer able Rollover	Head phones
Clinton	XXX													
Gore		XXX												
Burton									XXX	XXX				
Emanuel			XXX	XXX		XXX								
Foster					XXX		XXX							
Gaughan														
Lindsay			XXX										XXX	
Herman														
Scott														
Montoya														
Neel			XXX											
Panetta			XXX						XXX					
Paster			XXX							XXX	XXX			
Podesta			XXX		XXX									
Rasco			XXX	XXX										
Segal			XXX			XXX								XXX
A. Stock			XXX											
Varney			XXX	XXX	XXX	XXX		XXX				XXX		
VP Office				XXX						XXX				
M. Williams			XXX					XXX						

The responses in this Table come from interviews conducted during June, 1993. The responses were generated by interviewees. It is important to note that had the interviewees been given a checklist of options many of them would have probably chosen additional ones.

Telephone Etiquette is Weak or Missing in Many Offices

- Numerous interviewees complained about the poor phone manners of White House personnel; people answering phones are impolite, even rude.
- Terms included "abrupt," "rude," "insensitive," and "pompous."
- People don't return calls

Recommendations:

- (1) A series of phone etiquette short courses (1 hour) be offered for support personnel in all offices.
- (2) Interns and volunteers who will be answering phones in offices should be required to attend a one hour training course on phone etiquette.
- (3) A monthly memo about phone etiquette be distributed in the form of a "catchy" and well designed "tent card" on phone etiquette.
- (4) Top level people, when they encounter poor phone etiquette, must immediately coach the caller on proper etiquette.

Implementing Telephone Courtesy Skills

Watkins gets the Chief of Staff to write a short memo about the importance of good telephone manners. The memo highlights:

-why telephone courtesy is so important to the White House.

-keys to telephone success (only examples--a complete list would be longer, with examples):

-make sure you know how to work the phone (don't use some feature unless you know how to do it effortlessly)

-don't let the phone ring more than three times.

-remember it is the caller's first contact with the office.

-always answer with the name of the office and your name.

-make the person feel welcome. Treat them like a guest.

-if you sit up straight, talk with a smile on your face, the hospitality will come through.

-use the caller's name and always use their last name unless he or she tells you otherwise.

-if you have difficulty remembering names write the name down.

-talk slowly...but not as if bored...don't rush your caller.

-listen to the caller..let her or him finish...don't interrupt.

-if you need to put someone on hold, ask them first..and listen for their answer.

-if you are taking a message, always write it down, spell out everything...read it back to make sure you got it right.

-don't commit another person (someone calls for X and X isn't in, don't promise X will call back. Instead, say you'll give X the message).

-when appropriate, at the end of the call, give the caller your name (e.g., If there are any problems, call me back. I'm Jack Jones.

-thank the person for calling.

-if you have taken a message, make sure the intended person gets the message. Make sure the message has a date and time written down.

-within the office, keep score on the number of hours it takes to return calls.

As part of the new phone installation offer:

-short classes on phone skills

-create an attractive brochure about phone skills

OA sponsors a monthly short course on phone skills for all new volunteers

The intern office offers a brief class on phone skills for all new interns.

Every two months a small, attractive tent card is produced that highlights different aspects of good phone behavior. The cards "appear" on people's desks as a surprise.

Every office needs to write a "preferred script" for interns and volunteers.

Watkins encourages every senior person to note excellent phone skills by a person as well as poor phone skills (it only takes one top staff member to say, "This is XX..the way you are handling phones isn't acceptable)

There are "Ambience" Items People Want in the West Wing

- People expect coffee pots in different locations throughout the West Wing.
- People want coffee available in West Wing all the time (Sundays, early morning).

Recommendations:

(1) Mr. Watkins' office should explore the possibility of providing a coffee service at different locations within the West Wing. This service would be maintained during extended working hours throughout the week and equipment would be available for use on weekends and evenings.

-this will need to be funded by non-government monies. Mr. Watkins should explore whether it might be funded by the DNC or other external sources, or by contributions within the West Wing.

- People would like early delivery of major newspapers (bulldog edition of Post, early copy of Times and Wall Street Journal).

Recommendations:

(1) News Analysis calls each office in the West Wing and ascertains those newspapers which they would like delivered early.

(2) News Analysis arranges to deliver selected newspapers by 6:30AM each day to each office in the West Wing.

- Umbrellas need to be made available and awnings installed.

Recommendations:

- (1) Umbrellas should be purchased for people entering and leaving the West Wing.
 - (2) Umbrellas should be purchased for the use of people entering through the Southwest Gate (and needing to exit their car for inspection), entering through the Northwest Gate for a West Wing appointment, and for people entering the East Gate for special events.
 - (3) Awnings should be placed by each outside gate as covers for people waiting to enter the White House.
 - (4) Awnings should be placed over the East entrance to the White House for special events.
- One major office in the West Wing would like a "runners" service (to do small errands).

Recommendations:

- (1) Mr. Watkins should use interns and volunteers as "errand" people for the West Wing. They would be located in the West Wing mail room and serve as the equivalent of pages in Congress.
- There should be more plants within the West Wing and the OEOB.

Recommendations:

- (1) Mr. Watkins should, with the assistance of Interior Design, walk the West Wing to identify suitable locations for plants and flowers in hallways and offices.
- More vending machines in the West Wing for when the Mess is closed.

Recommendations:

High School
Students -

(1) Mr. Watkins should arrange to have additional vending machines placed in the West Wing.

- People don't understand the reasoning behind some of the "rules" used in apportioning White House services. For instance, two people believe that there needs to be more flexibility with cars and drivers (e.g., for Hill meetings they wait only so long, they won't drive you home from airport even if home is on the way back to White House).

Recommendations:

(1) The laws associated with different services (e.g., cars) need to be better explained to staff members. The Office of Management and Administration conducted a rules audit and determined, given laws and scarce resources, that the present rules were optimal. The reasoning behind them need to be explained to people.

Implementing Ambience Items in the White House

Watkins explores the following options about **coffee service** in the West Wing

- a. Are their strategic locations in the West Wing where a coffee service would be suitable?
- b. If yes, can funding from non-government sources be found for purchasing equipment and supplies?
 - from personal donations of people in the West Wing
 - from "found" money from the campaign
 - from DNC or other groups
- c. if yes, implement

Watkins arranges for earlier delivery to offices of major **newspapers**.

- a. checks at morning staff meetings on delivery times that are desired.
- b. arranges for "bulldog" edition of Post to be distributed (early morning may mean that someone on "overnight staff" becomes responsible for West Wing deliveries of early editions).

Park Service produces **awnings** for the White House

- a. Awnings are placed at gates.
- b. Awnings are placed at East entrance.

Watkins arranges the purchase of **umbrellas** for the West Wing and entrances to the White House.

- identify umbrellas
- determine security for umbrellas
- purchase umbrellas with White House logos
- purchase stands for umbrellas

Watkins considers the idea of "White House pages" who serve as **errand runners** and messengers within the West Wing using interns and volunteers.

Watkins walks the West Wing with Interior Design to identify locations for more **plants**.

Watkins works with Interior Design on locating **vending machines** (coffee, soda, snacks) in the West Wing (but not in Press area).

Watkins visits with personnel who raised issues about **cars** and discusses reasoning behind the decisions.

The Amount of Meeting and Conference Space Available in the Complex is Unacceptable

- Interviewees have difficulty finding rooms in which to hold important meetings.
- There is no priority system for meetings (staff meetings that could be held anywhere take up valuable public rooms).

Recommendations:

- (1) An index of rooms, sizes, and equipment usable and available for each room be included in the Staff Manual.
- (2) Copies of the information be distributed to people who do not receive the Staff Manual.
- (3) A priority system be created favoring: (a) early scheduling over last minute scheduling, (b) public meetings over staff and departmental meetings.
- (4) More conference rooms need to be created. One interviewee suggested that the cafeteria in the NEOB be reduced in size. The space saved by the reduction might be made into a large meeting room. In addition, a building in Jackson Place needs to be turned into a conference center for the White House (see next page).

A Conference Center Should Be Established in One of the Townhouses on Jackson Place

- People regularly complain about insufficient conference rooms in the complex.
- Clearance into the complex is often difficult for short meetings with visitors, or for long meetings requiring multiple entries (e.g., lunch).

Recommendation:

- (1) One of the townhouses in the Jackson Place be modified into a White House Conference Center.
 - There are no clearance problems for those buildings. A meeting center in one of the buildings allows easy access in and out of the building.
 - The Jackson Place townhouses are seen as having "status." They have a look of class, a feel of history, and a location that most envy.
- (2) The Conference Center should include a kitchen for food service.
- (3) The Conference Center should contain all the necessary materials to hold meetings and conferences beyond tables and chairs (e.g., overhead projectors, video equipment, easels, computers, video-conferencing equipment, meeting management equipment (e.g., polling equipment)).
- (4) The Center should be assured of high status by early scheduling of some important "internal" meetings of White House staff members. In addition, the place will need to be used regularly for meetings by high status individuals (e.g., Chief of Staff).

Meeting Planning Needs Improvement

- There is no coordination about the set-up or management of meetings.
- The OEOP and NEOP host hundreds of meetings a year.
- Currently, most offices holding a meeting must do all the work in planning, scheduling, arranging, and hosting that meeting.
 - A number of offices complained about the time and effort it took to plan meetings, answer questions about facilities, insure that meeting rooms are set up appropriately, and escort visitors to meetings.
 - These tasks, for untrained people, create needless overlap, enormous amounts of wasted time, and, sometimes, poor meetings.
- A meeting planning office might take over many responsibilities for major meetings:
 - Lend experience to offices planning events
 - Ensure that all equipment is appropriately arranged
 - Escort groups from entrances to the meeting rooms
 - Serve as a contact for visiting groups

Recommendations:

- (1) Planning for major external meetings within the OEOP should be coordinated by a single office within Room 1. The services will be publicized for major groups.
- (2) Sufficient interns and volunteers should be assigned to perform many meeting tasks.

(3) A formal meeting planning office also supports (and may serve as) the "concierge" operation proposed elsewhere in this document.

(4) Where possible, meetings ought to be scheduled at irregular times (e.g., start at 9:15 rather than 9:00) to control overcrowding and congestion at the entrances to the building.

(5) Each office needs to appoint one person as that office's "meeting planner" to coordinate with OA personnel on meeting plans. This person would know all of the issues associated with planning, scheduling, and conducting meetings for that office.

Garnering Information about Services is Difficult

- People have difficulty discovering how to do any number of tasks within the White House.
- People don't understand some White House operations (e.g., the difference between Signal and the White House Operators).
- A number of interviewees complained about the difficulty of simply "finding out how to get something done" within the complex. People know there is an easy way, they just don't know what it is.
- Top level people find themselves spending a great deal of time searching for assistance; other top level people spend a good deal of their time aiding others in their search.
- There is no central repository for "institutional memory" about services
- People don't know who to talk with in different offices about different issues.
- People don't know the rules and don't know how to discover what they are (e.g., going through the Residence to East Wing, use of the Official Photographer).
- People want a Directory and Organization Chart. For top people, they want to know scheduler.
- People want a Staff Manual that is distributed to all offices.

Recommendations

(1) Create a Customer Information Center (An "ANSWER CENTER" for the White House)

- Create a single office and telephone number for all information referrals (i.e., a "456-HELP Center" for EOP staff members)
- The office will be staffed during extended working hours throughout the week and on Saturdays.
- The personnel will serve as a White House "concierge" providing callers with answers to questions about support services (e.g., "Who do I call about...?" "How do I get... ?") as well as aiding callers, when possible.

- Services will be limited to information (e.g., "Call this person...", "The nearest restaurant that is open this time of day and will deliver to the White House is...", "You need to get the form from your Administrative Officer who is...")
- An extensive data base will be maintained tabulating such things as the sorts of requests for information people make. This will serve as a way of identifying new service strategies that would enhance White House operations.
- The Center may also serve as a complaint department about services. When people call and are referred to an office, and then find that office wanting, they should call back and report the problem.
- The office should operate directly out of the Assistant to the President for Management and Administration.
- People working the phones need to be highly trained in phone skills, very knowledgeable about the White House and the community, and legendary for memory skills. They should be career people so that they can accumulate institutional memory about the White House.

(2) A Staff Manual needs to be produced immediately.

(3) A new Staff Directory needs to be completed immediately. The Directory needs to include staff members' room addresses, telephone numbers, and fax numbers (and, where possible, their EMAIL addresses).

Electronic Mail is Weak

- This was the second most common request of interviewees.
- People expect a system far better than the current one. The current system is cumbersome and not "user friendly."
- Not everyone's computer is even wired for OASIS.
- Training is either unavailable or unknown within the complex.
- The different systems (PROFS, OASIS, NSC, CEA) are not well connected.
- There need to be direct links with Cabinet officers. Some offices (e.g., Cabinet Secretary) need to interact constantly with Cabinet officers, their Chiefs of Staff, and direct reports. The phone is "impossible" and faxes are unnecessary.

Recommendations:

- (1) A better, more sophisticated, EMAIL system is necessary.
- (2) Regularly scheduled short courses on EMAIL need to be offered. Various offices need to consider whether these courses should be mandatory for personnel. Training should start at the office level. Training should happen within offices and should be brief. A series of mail exercises can be easily created for the short courses.
- (3) Readable written materials on using the EMAIL system should be available to all users in both hard copy and through the computer.

(4) A high priority needs to be placed on connecting offices to the OASIS system. The goal must be that every office within the EOP (including NSC, OMB, CEA) be connected.

(5) Cabinet officers (and their direct reports) need to be connected to the White House EMAIL system.

(6) The goal is an "electronic campus" where every office is connected to every other office. A starting point would be to connect every major service office to the mail system and quickly release their mail addresses.

People Need Better Technology Support (Software & Hardware)

- People perceive that the White House is not on the "cutting edge" of technology. They want more and better software and hardware.
- Single biggest requests are database software and macros for frequent tasks and often used forms.
- In the long run, there is a desire for better records management and retrieval (instant retrieval of correspondence), scanning technology, and electronic commenting (e.g., LOTUS NOTES).
- Major hardware requests include more 486s and laptops.
- Some offices need LANs (e.g., Herman).

Recommendation:

(1) People responsible for technology support need to interview every major office asking them about their software needs. A checklist of available software needs to be created to aid people in identifying needs.

(2) A number of offices should be supplied with data base software focused on their specific needs (e.g., Scheduling and Advance needs a data base program on speaking requests in different cities, one that maintains a list of volunteers; the Office of the First Lady needs a "people-base" database to determine who is a friend of the Family; Public Liaison needs one for scheduling, list management, and correspondence tracking).

(3) Scheduling software should be developed. It should be jointly available to a number of offices (the campaign had a system that was quite good).

(4) A series of short "macros" should be written and made available to all. The macros would solve user problems with the current system (e.g., returning to WP from ALL-In-One easily). Interviews with users should identify the key macros.

(5) Software must be customized for each office. This means that people from IRMD will need to visit with an individual office, determine their software needs, customize the software to the particular needs described, and then provide training and support for that software.

(6) A major initiative should be the replacement of paper forms (payroll, purchasing, budgeting, supplies, accounting information, inventory) with electronic forms.

(7) Other software needs to be created for specific offices (e.g., The Staff Secretary would like to have the Briefing Book forms placed in an electronic medium; there should be some easy ways for storage of records to meet the requirements of the law; there is a need for a correspondence retrieval system for the West Wing).

(8) Certain types of hardware should be available on a "check-out" basis (e.g., laptops should be available to people for loans for when they are traveling).

(9) People would like faster, more sophisticated hardware in the form of computers, local area networks, and printers.

(10) Certain "special" technologies need to be created for the EOP. These include direct EMAIL lines to Cabinet members, Chiefs of Staff and perhaps, in the long run, videoconferencing options with each Cabinet member and the Office of the President.

Computer Services Must Become More Customer Oriented

- The Division is not perceived to be customer centered.
- A number of people complained about poor customer services from IRMD.
 - It takes too much effort to work with them; they may have things to help us but it is "such a hassle" to get them to help.
- Others complained about poor software support.
 - "They have great stuff, but they don't help us get it" referencing software
 - They don't do adequate training
 - Many kinds of helpful software is not available
- People need better and more accessible training.

Recommendations:

- (1) IRMD must visit each major office on a regular basis to determine customer needs. Every six months a representative of IRMD should make a "client call" on each office assessing their software, hardware, and training needs.
- (2) People within IRMD should be assigned as advocates-assistants to each office (e.g., one person from IRMD becomes the primary contact point for each office within the EOP). This way, people in computer services come to better know and understand their customers' needs.

(3) Accessible training should be available in the form of short courses, reading materials, and hand-outs. On-site training (where training is done in the customer's office rather than in a central location) must be done. It is more time consuming and expensive but it offers greater customization, greater accessibility, and in all likelihood, greater participation.

(4) The "help" number for IRMD needs to be attached to every computer, monitor, and printer in the complex.

Many Support Services are Not Customer-Centered

- Services are not proactive; the philosophy seems to be that the "squeaky wheel" gets the attention.
- Personnel services are weak.
 - People sense the personnel office does not take a proactive approach.
 - Many people feel they have inadequate information about personnel related issues.
 - There is little confidence in the personnel office's ability to solve problems (one major office in the EOP sends their Human Resources person over with every new hire just to make sure things go well).
 - People are unclear about what their benefits are; people have found mistakes in their income statements (their "pensions are 'all screwed up';" their "pay is deposited in the wrong accounts.")

Recommendations:

(1) The Personnel Office design a understandable and readable summary of people's pay and benefits (e.g., Currently you are paid XX amount on a monthly basis. Your pay check is being deposited in XXX bank under account number XXX. Each month XXX amount of money is deposited in your pension...). The emphasis should be on clarity and brevity. These statements should be sent to each employee along with a telephone number to call to clarify anything

(2) The Personnel Office should conduct client visits with various Departments seeking to help them better understand the Personnel Office's function and role.

- WHCA is not customer-oriented to anyone but the President.
 - WHCA does an excellent job offering communication services to the President.

- Members of both the First Lady's staff and the Vice President's staff complain they do not get sufficient service from WHCA. It is a "constant problem" for both offices to obtain phones, teleprompters, and other communication-related items.
- There is a perception problem: WHCA views their responsibilities as limited to the President, while the offices of the First Lady and the Vice President expect WHCA to also serve their needs.
- WHCA receives very mixed reviews: some offices do not like WHCA, some do not find them very helpful.

Recommendations:

- (1) WHCA, the Chief of Staff, the First Lady's Chief of Staff, and the Vice President's Chief of Staff meet and reach agreements on what WHCA can and cannot do for various offices. One theme may be to identify whether WHCA serves the President or the Presidency.
- (2) If WHCA is unable to provide necessary support for the First Lady's office and the Vice President's office, then some other office needs to assume responsibility for ensuring that the communication needs of both offices are met.
- (3) WHCA, as a Department, needs to conduct interviews of their "customers" to ensure the quality and sorts of service they are providing are in line with their customer's expectations.

- Travel reimbursements take too long.

- It currently takes too long for people to receive their travel reimbursements.
- Few things are as much of a hassle as a slow reimbursement system.
- With young staff members who have little money, the slowness of the process is beginning to limit who will travel for the White House (especially within the Scheduling and Advance office of the President and the Vice President's office).
- There is nothing "systemic" which precludes a faster reimbursement system.

Recommendations:

(1) A standard for an average reimbursement time should be established. The standard should be less than 10 days after submission to an office's administrative officer (shorter would be better).

(2) The processes involved in the reimbursement process need careful examination. Time delays should be identified and rectified. For the vast majority of time, travel reimbursement forms sit on people's desks.³

- It is difficult to deal with so many different offices for services.

- There are numerous telephone numbers for the different services (e.g., facilities, computers, carpentry, electricity). People call and then discover they don't have the correct number.

Recommendations:

(1) Create A Central Service Center for equipment, maintenance, and repairs unrelated to computers.

- Create a single office and telephone number for all service requests. The number would be used for all equipment, maintenance, and repair services.

- The office should be staffed twenty-four hours a day.

- One telephone number should be listed for all repairs, maintenance, and equipment services.

- Personnel working in this office will be drawn from GSA, who is currently responsible for most of the problems this office will solve.

- Personnel working this number should exude skills related to service. They should, for instance, always offer their name, tell the person the approximate time to solve the problem, and, when appropriate, work directly with the Administrative manager in each office.

³Currently the process is (1) Staff member completes travel reimbursement form, (2) submits form to the office's administrative officer, (3) the administrative officer forwards the form, after approval to Room 1, (4) Room 1 processes the forms each Wednesday morning (problem: if a form arrives on Wednesday afternoon it sits in Room 1 until the next Wednesday), (4) if there are any problems with the form Room 1 returns it to the office's administrative officer (another week), (5) Room 1 submits forms to Brian who give his approval, (6) the form is sent to NEOB who cuts a check in a "few days," (7) the check is sent to the person.

- An extensive data base must be maintained tabulating such things as sorts of requests and time to completion. Response time, fulfillment of orders, and courtesy should be assessed regularly.
- A summary of the data collected should be sent to the Assistant to the President for Management and Administration on a monthly basis who should, in turn, send a copy to the Director of GSA.

(2) A separate number should be used for computer services. That number should be posted on every computer.

Offices Don't Treat Other Offices Like Customers

- There is poor coordination among offices.
- People don't talk with one another before doing activities.
- People don't know what is going on in other offices; they don't know the issues that they may have to deal with later.
- People don't know schedules of other offices. They don't know about public briefings held by other offices.
- Working with other offices is frequently too much of a "hassle."
- People don't know how materials get included in, for instance, the President's briefing book.

Recommendations:

- (1) Meetings should be held among various offices who serve as each other's "customers" and "suppliers." At these meetings each office should describe its functions, introduce staff members, discuss current issues, and raise questions about the other department's goals, issues, and concerns.
- (2) There should be a central calendar of important briefings and public meetings maintained by the office of the Assistant to the President for Management and Administration.

The Volunteer and Intern Programs Need Consistency and Better Development

- The Volunteer Office is the "temp" service of the White House. It is critical to the operations of many offices in the EOP. It is filled with opportunities for service.
- The volunteer program needs strengthening: The quality of volunteers is inconsistent; their reliability questionable; their skills variable.
- Given the importance of volunteers, the organizational support for the program is weak.
- Offices fear the end of intern programs. They need it.
- Both volunteers and interns need some basic training on skills such as telephone etiquette.
- Volunteer Programs in the EOP must be significantly strengthened.
 - Virtually every office within the EOP depends heavily on volunteers to complement paid staff. Volunteers are "critical" to the operation of many offices.
 - Some offices depend on the central volunteer office; other offices seek out their own volunteers through personal contacts. Generally, there is more satisfaction with volunteers selected through personal contacts.
 - The central volunteer office is understaffed, overcrowded, and in terrible need for better technology support.
 - Some interviewees complained about the lack of training and/or poor selection processes involved in assigning volunteers to offices (e.g., a highly sociable volunteer gets assigned to a writing task; a rather quiet volunteer gets assigned to answering phones and meeting members of the public).
 - There are few organized efforts within offices to select, train, manage, motivate, or assess volunteers across the EOP. What is done is inconsistent.

Recommendations:

(1) Given the central place of volunteers within the EOP, the Volunteer Office should be strengthened significantly in terms of personnel and funding.

- the office needs a permanent secretary/receptionist to work with volunteers, know every office's needs within the EOP, cajole and coach offices to use volunteers appropriately, and so on.
- the office needs better technological support
 - in terms of computers.
 - in terms of software (database, CCP).
- the office needs an interviewing room to meet and assess volunteer capabilities.

(2) A "feeder" system for volunteers needs to be refined. When recruiting volunteers it is useful to: (a) use outstanding current volunteers to find others, (b) develop long relationships with civic organizations, schools, and other groups who might serve as "feeders" for volunteers. Currently, the operation assigns groups as they arrive. In an optimal environment, the office would have some individuals "on call" when special needs arose.

(3) An in-depth interview (probing skills, interests, experiences, and preferences), a formal orientation, and written materials need to be created for volunteer selection and training. The Volunteer Office has begun this already.

(4) The Volunteer Office needs some way of getting access to vacant rooms within the OEOB.

- Mr. Watkins should instruct Sig that any time a room is going to be empty for more than three days, she notify the volunteer office.

- The Volunteer office can use the room as a temporary room for volunteers (according to the Volunteer Office they can clear a room in less than 2 hours).

- Any available space within the building needs to be "loaned" on a day-by-day basis to the Volunteer office.

(5) Regular motivational activities (e.g., picnics, awards for service, photo opportunities, additional training) need to be scheduled more frequently for volunteers. They have already initiated some of these sorts of activities.

(6) It would be useful if the each volunteer who regularly worked in an office received a quarterly letter thanking him or her as well as offering some notice of personal strengths.

(7) Offices should be coached about the place of volunteers, their motivations, and their limitations.

(8) The Volunteer Office needs to regularly and systematically interview each office that uses "its volunteers." The interview should allow the Volunteer Office to determine the needs of each office and its success in matching volunteers to offices.

(9) The Volunteer office needs to be moved to a location closer to the 17th and G Street entrance. This is the entrance most volunteers use.

(10) Every office needs to be instructed to send their volunteers through the Volunteer Office.

(11) A separate V badge needs to be created similar to the A badge. Currently, a top level government official visiting the complex wears the same badge a volunteer wears.

- Intern programs need bolstering

- Many offices depend upon interns for a wide variety of tasks.

- The Summer intern program has "really helped" many offices who are fearful of a "meltdown" in the Fall if they don't have interns available to them.

Recommendations:

(1) Significant attention must be paid to bolstering Fall, Winter, and Spring internships within the EOP. This would include:

- Working with academic institutions to create and maintain consistent links with the EOP for internships.
- Create a cadre of academics within the D.C. area who create courses providing interns with academic credit for their work in the EOP.

The notion here is that there are a number of faculty members at different Universities who would love the opportunity to manage internship programs within the White House. They could have students register, at their Universities, for credit while interning. Then students would meet on a weekly basis for a class that integrates experiences with assigned readings.

(2) Each major office within the complex needs to identify an intern coordinator who:

- Is committed to insuring interns receive an interesting and informative experience while working in that office.
- Is knowledgeable about the needs of the office for interns.
- Is willing and able to identify the specific sorts of interns (e.g., skills, predispositions) the office might use.

(3) The Intern Office should collect exit data from interns about:

- The intern's evaluation of the program.
- The intern's perceived role and learning experience within the office.

(4) The Intern Office should collect exit data from each office that used interns about:

- The suitability of the intern(s) for the office.
- The intern program in general.

(5) The manner in which interns and volunteers are cleared into buildings needs improvement.

- A hard badge designed especially for interns and volunteers needs to be created.
- It wouldn't need a picture.
- It could be reused by different people over time (e.g., an intern for the first summer session might use it during that period, it would then be turned in, recoded, and used for a different intern the second session).

The Visitors System for Tours is Weak

- The process is not as good as it could be.
- Public tours are often unrewarding and unimpressive for visitors. People leave the tours complaining about:

-The Ticketing Process

- it takes too long
- sometimes people wait for hours and then discover there are no tickets available
- difficulty in finding out where to get tickets
- tours unavailable for the time the visitor is in Washington; no advanced bookings

-The Wait to Enter the White House

- it takes too long
- there are few distractions (it is boring)
- inadequate restrooms, water fountains
- signage is unclear and inconsistent
- there is no connection to other sites/events in the area

-The Actual Tour

- disappointed by how short the tour was; you feel rushed; officers ask you to keep moving
- no explanations about what they were seeing; don't know who to ask question
- the uncommunicative officers
- no proactive communication
- you feel threatened when you ask a question

- they are unfriendly and very terse with their answers
- inaccessibility for handicapped

-After the Tour

- no printed materials or "trinkets" are available for visitors⁴

Recommendations:

- (1) Large signs by each gate telling visitors where to go for tickets.
- (2) Large historical maps be placed on the fence on each side of the White House to inform visitors of what they are looking at.
- (3) Printed material about the White House should be available for people at all times near the Visitors Center.
- (4) The National Park Service improve forecasting information about wait time and about the availability of tours. Currently, people can wait in line for two hours to only discover, at the end of their wait, that no tickets are available. Potential solutions would be to distribute numbers to people telling them their place in line, have a better geographic sense of where the "cut" should be in the line, and posting signs telling people the number of remaining tickets.
- (5) Printed material should be produced for children. Currently, the only printed material is produced by the NPS for adults.

⁴ The only available printed information is what is distributed at the ticket booth. The White House Historical Society has a booth within the White House to sell books, pamphlets and other sorts of souvenirs. It is located at the start of the tour for Members, Congressional, and special tours. Nothing is available at the end of the tour for Congressional and Member tours. For public tours a small stand is set up outside at the end of tours and the stand inside is often missing.

- (6) Printed materials either on the fence or ground telling people interesting information about the White House while they wait in line.
- (7) Small printed material interspersed throughout the tour about objects, paintings, and history.
- (8) Signs need to be consistent, readable, and informative. Currently, many of them are not understandable, consistent, or even accurate.
- (9) Mr. Watkins needs to work with the Secret Service on improving the communication skills of officers when dealing with questions from visitors (or, alternatively, add a second person in each room to answer questions).
- (10) Written materials be placed at the end of tours offering information about the White House for people who have completed the tour.
- (11) A sign be posted telling people that books, postcards, etc. are available across the street at the White House Historical Society Office.
- (12) A monthly evaluation be conducted of the tour by the Visitor's Office. The evaluation would include surveys of visitors as well as the use of "mystery" visitors. The report would be sent to Mr. Watkins.
- (13) Mr. Watkins will instruct the Park Service, Usher's Office, GSA, and Secret Service to include representatives from the Visitor's Office and Social Secretary's office on all teams focusing on the White House.
- (14) Mr. Watkins works with the President, First Lady, Vice President and Mrs. Gore encouraging them to randomly stop by during visiting hours to greet visitors.

(15) Explore adding a corps of professional volunteers to the public tour process. A guide can be stationed in each room and give a continuous monologue on that room. Officers would be for security only.

- Special Tours (e.g., Congressional and Member Tours) Need Examination

- The tours are positively reviewed by most visitors. They find them interesting, informative, and enjoyable.
- Visitors get no written information about the tour, nor do they receive any souvenirs of their experience at the White House.
- Currently, most visitors on special tours (i.e., Congressional and Member tours) give positive credit to their Senator or Congressperson, not to the White House.
- There are not enough special tours focusing on distinguishing characteristics of the White House

Recommendations:

(1) More specialized tours, such as the Garden tour, need to be designed and conducted. There should be special tours focusing on such things as the "Art of the White House" or the "Decorative Art of the White House," as well as tours focusing on various historical aspects of the White House. In addition, more tours such as the "Garden Tour" need to be created (e.g., "Fall at the White House"). Each of these should be by special invitation of the President and First Lady.

(2) The "diversification" issue for special tours should be modified. The Visitor's Office needs to return to the "first come, first serve" process. The decision to use a diversify standard has some positives, but more negatives.

Pro: Maximize representation and opportunities across various groups in the society.

Con: (1) Violates a "first come, first serve" principle that groups have come to understand and like.

(2) It implies that a certain value system is being applied to the tour process.

(3) It is politically difficult: People have a hard time understanding "Yes, we have seats open, but you belong to the wrong group for this month."

- The Visitor Center Needs Repainting, Refurbishing, and Consistent Maintenance

- The Center, which is most people's first encounter with the White House is an embarrassment to the White House

- it is "dirty," "shabby," and "dated"

- the plants have layers of dust on them

- the entire building needs painting

- there are water stains within the building

- the floors and glass are not maintained

- leaks in the ceiling to the electrical closet threaten expensive new electrical equipment as well as safety (there have been threats about calling OSHA)

- the inclines into the Center and into the White House are slippery when wet (At some point someone will fall and injure themselves)

- signage is inadequate and some of it is falling down

- repairs need to be made to stanchions

- signage is inconsistent

- trash cans are ugly and dirty

- there is no fax machine

- there are no decorations (e.g., flags) or welcoming signs

• No one office assumes responsibility for the facility. It has some "ownership" by the Usher's Office, the Visitor's Office, Secret Service, and National Park Service office. In interviews each office assumed some degree of responsibility but shifted some to other offices (e.g., "If Gary told us to do the job, we would..." "It is the Usher's office that is responsible for this..." "This is really what the Park Service does..." "GSA is supposed to do this.")

Recommendations:

(1) A direct statement by Mr. Watkins needs to be made to all relevant parties that the Center is a top priority for maintenance.

(2) One office within the White House needs to be assigned total responsibility for maintaining the physical environment in the Visitors Center, with clear lines of authority to other offices involved. Standards need to be established and then this office held responsible for meeting or exceeding those standards. Minimally, the Center must be cleaned on a daily basis.

(3) A team needs to be quickly established to refurbish the Center.

a. Mr. Watkins' office needs to coordinate the team.

b. The team should include the Visitor's Office, the Social Secretary's Office, the Usher's Office, the Secret Service, and the National Park Service.

c. The team must be given a specific goal ("make it look great; solve all the problems listed above"), given a short time span ("within two weeks"), and told that this matters mightily to the top people in the White House.

d. After one week, Mr. Watkins checks on progress.

e. After two weeks, daily updates are required.

(4) Additional equipment be purchased for use during major events. The equipment includes more computer lines to WAVES as well as telephones.

- Gate appearance is lousy.
 - The guard houses are the first thing most visitors to White House encounter
 - Many of the outside gates to the White House are in "serious" disrepair
 - almost all need new paint, inside and outside
 - ceilings leak in many of the building
 - many of the buildings need new floors
 - The Chief Ushers office is responsible for maintenance. The National Park Service responds to the instructions of the Chief Usher.

Recommendation:

- (1) The Chief Usher should instruct the Park Service to repaint the guard houses (specifically, the NW, SW, and East Gates).
- (2) The Chief Usher should order an inspection and repair, where necessary, of the floors in all guard houses.
- (3) The Chief Usher should order an inspection and repair of ceiling leaks (at, minimally, the NW and SW gates).
- (4) The purported "regular" maintenance and painting schedule must be significantly improved.
- (5) The Park Service should design and install awnings at each guard house where visitors must stand and wait for clearance.

Visitors (both Public and Invited) Need Something to Take With Them.

- During tours of the White House, there are few "memory" items
 - If you take a Members or Congressional tour, there is nothing available.
 - If you take a public tour you receive only the public brochure done by the Park Service.

Recommendations:

(1) Attractive written material needs to be produced for every special tour. The material would be something people could take home with them. It would highlight the role of the President in the tour.

- For Congressional tours, a pamphlet about the White House should be distributed
- For Members' tours, a folder including a letter from the First Family, a pamphlet, and a souvenir photograph, needs to be distributed.
- For Special Tours, a special packet needs to be created depending upon the visiting group or topic of the tour.

(2) Special written material needs to be produced for children visiting on special tours.

- For social events, there are not enough "memory" items.

Recommendations:

(1) A few special inserts be written about the White House, its rooms, and its history, that may be included in any sort of program used by the Social Secretary's office. This material might also be used by other offices for visitors, as well.

- Trinkets related to the White House need to be available to offices

- Any number of offices enjoy having trinkets (cufflinks, key chains, M&Ms, coasters) to distribute to important visitors
- What trinkets are available and how to get them is unclear

Recommendations:

- (1) A "status" list of trinkets needs to be created (e.g., "cufflinks are more "special" than M&Ms)
- (2) A limited distribution memo goes out to every Department head describing what is available, how to get it, and when it is appropriate to use.
- (3) A central repository for trinkets is created and a log kept of the use by different offices.
- (4) Something very inexpensive needs to be available to all offices as a "treat" for visitors. One suggestion: cardboard coasters.

Event Planning for Social Activities is Poorly Scheduled

- Schedules are not determined early enough.
- Consequently, people have too many "last minute" events.
- There are two major internal reasons for late scheduling:
 - poor planning on the part of an office
 - an unwillingness of the Scheduling Office to commit until the last moment
- People get stuck at the entry because there is no one there who knows them to clear them into the event.

Recommendations:

- (1) Each office needs to create a yearly schedule of planned events. There are a number of events that are "necessary" ones---ones which will certainly happen within the coming year. The calendar needs to be updated each month.
- (2) Each office planning events involving the Social Secretary should meet with her office. At the meeting the following needs to be discussed:
 - planned events for the upcoming year
 - logistic needs for each event

These meetings need to be coordinated by the Staff Secretary's office.

(3) The Social Secretary's office needs to collect data on how far ahead every event was planned by a major office. The Social Secretary should record how long they had to prepare for the function. At the end of each quarter these results should be forwarded to Mr. Watkins' office.

(4) The Scheduling office needs to be willing to make scheduling commitments earlier for key personnel in the White House. Last minutes changes, due to emergencies, are understandable. But it will be impossible to create high quality events without a better system of early commitments.

(5) When an event is being held, someone from the office sponsoring the event must be at the gate where invitees enter and remain at the gate until the end of the event. His or her role will be to clear last minute invitees.

Mail is not always Delivered Promptly or Thoroughly

- Three offices sensed that it takes too long to get external mail to offices.

Recommendations:

(1) There should be an expedited system for mail service to different offices. The President has his own zip code; perhaps others should have special identification as well. It may be a zip code, it may be an internal label that is assigned to each office.

(2) Each office, in correspondence with writers, should ask writers to use a certain address or number to speed processing of mail.

- There is a feeling, among some interviewees, that they aren't getting all the general memos other people receive; internal memos are not always distributed to everyone who should get them.

- People are unclear about how to address memos that need to be distributed widely.

• The biggest problem, though, lies within different offices. The mailroom delivers a certain number of copies (based upon employee count) to each office's "in-box". Then it is up to the administrative individual within the office to distribute the memo. If he or she doesn't distribute the memo throughout the office, not everyone gets it.

Recommendations:

(1) Each administrative officer is reminded, regularly, about the importance of distributing memos to everyone in the office.

(2) For memos judged legally, politically, or otherwise important, a specific name and address label be placed on each one prior to distribution.

(3) Electronic mail be used more readily for purposes of communicating important information. Memos should be sent but they should also be distributed via electronic means.

- Messenger deliveries are not always done effectively.
- People may overuse the red dot system.

Senior Staff Members Feel They Need More Secretarial Support

- Because of the staff shortage, a number of senior people are doing secretarial work.
- Personnel assigned as secretaries are not really secretaries--they don't know dictation skills or transcription skills.

Recommendations:

- (1) An audit should be conducted of the specific secretarial needs of each senior officer. Those needs should be (1) tabulated, (2) used as a general guide to staff needs, and (3) used in placing new personnel in offices.
- (2) A questionnaire should be created for individuals who may be placed in positions akin to secretarial ones. That questionnaire should assess each individual's competencies in a variety of secretarial tasks including typing, dictation, and transcription skills. Certainly, no individual ought to be placed in a position akin to secretarial without typing experience.

Staff Members are Not Well Trained on a Variety of Important Skills

- Any number of interviewees lamented the lack of management related training.
- People also wanted special skills training (e.g., time management).

Recommendations:

(1) The AP for Management and Administration should institute a series of short courses on a variety of management-related topics. The courses should be relatively brief (no more than half-a-day) and offered to personnel in every department. Certificates should be distributed upon completion of each course.

(2) Topics for the courses should be devised from a brief survey of the leadership of the Administration. The courses will only be successful if those individuals perceive they are needed. Possible topics include:

- Management related training (e.g., leadership, delegation, team building, appraisal and interviewing skills, conflict management, meeting effectiveness, negotiation).
- Personal skill development (e.g., time management, presentation skills, writing skills, computer skills).
- Business related skills (e.g., project management, strategic planning, finance and accounting skills).

(3) Instructors should be selected nationally based upon reputation, teaching skills, and practical knowledge. This last component is absolutely critical---everything must be practical.

(4) Offices under the aegis of the AP for Management and Administration should implement a 40 hour per year training requirement for all personnel---every employee should receive 40 hours of training a year.

Creating A Training Program for the EOP

At a meeting of the senior staff, Watkins probes about specific training needs of White House personnel.

Watkins collects, from top flight business schools, a list of the courses they offer for managers and executives.

Watkins also collects from different Federal agencies a list of managerial courses offered.

Watkins appoints a curriculum committee from White House staff.

The curriculum committee proposes a series of specific course topics useful to White House staff.

The curriculum committee vets various instructors from local Universities and from Federal agencies for their content expertise, teaching ability, and understanding of White House operations.

A series of short, two to three hour, courses are offered on a regular basis.

Administrative Contacts Within Offices Want More Attention

- Administrative contacts want a regular meeting with Watkins office.
- They want both information and a chance to be heard.

Recommendations:

- (1) A monthly meeting should be held for the Administrative Officers within the EOP.
- (2) The meeting will be chaired by Mr. Watkins. It is important that he attend and chair the meeting.
- (3) Each meeting will include an informational update by Mr. Watkins and reports by each Administrative Officer of issues she or he is facing. The goal is information sharing.

Offices Want their Own Budgets

- Three offices wanted a better sense of what they have to spend. They want to make their own decisions about where to spend their money.

Recommendations:

- (1) Each office needs to create and maintain a budget for items specific to their interests. General items (e.g., overhead) should be maintained separately for the entire EOP.

There is No Service Center for White House Employees to Enjoy Washington

- A number of people interviewed complained about the lack of "fun" activities for White House staff members and their families (e.g., tours of the West Wing for family members, arranging tours of Washington locations; sponsoring picnics, softball, football; arranging tickets for theaters and concerts; posting roommate announcements).
- There needs to be an activities coordinator who would be responsible for staff activities.

Recommendation:

(1) A staff member within Mr. Watkins office be appointed who will be responsible for coordinating recreational staff activities. Activities such as special tours of galleries, historic sites as well as picnics and social events would be included.

- The White House does not currently use its size to negotiate "special deals for employees."

Recommendation:

(1) The White House should explore creating an "employee recreation association" to negotiate "bulk" contracts for various activities in Washington.

- The White House needs a lecture series for staff members on issues
 - Staff members within the White House have few opportunities to interact and learn from both each other and experts from outside.

- Opportunities for learning by staff members are quite restricted outside of the offices within which they work.

Recommendations:

(1) A series of informative lectures about Washington, political issues, cultural interests, and policy concerns be offered for staff members. These lectures would serve both informational purposes as well as motivational purposes.

(2) The lectures should be scheduled once a month on a Friday at lunch time. The speakers should be "names" who offer informative and interesting presentations.

(3) A preliminary discussion of this needs to be conducted by senior Administration officials. Their buy-in is essential.

People Need More Non-Computer Equipment

- People would like photocopiers in their offices (e.g, Paster), more FAX machines (e.g., Herman), cellular phones (VP Office, Herman).

Recommendation:

(1) On a quarterly basis staff members from the Office of Administration conduct an equipment audit--what do you have? What do you need? This is followed by delivery of as much equipment as is possible.

- More Public Telephones Need to be Added in the OEOb.

- There are currently only three public phones in the OEOb (all are by Rm 450).

- Many people attending meetings in the OEOb need access to public phones.

- When there are meetings in Rm 450 and the Indian Treaty Room, numerous visitors visit nearby offices asking for temporary use of phones. This annoys and limits the efficiency of those office occupants.

Recommendations:

(1) The telephone jacks currently installed outside of Room 450 (in the clock room area) need to be activated and six phones purchased for use in that space. During meetings in Room 450 with member of the public, the six phones should be plugged in for use by the people attending the meeting.

(2) A number of telephone jacks be installed outside of the Indian Treaty Room and phones purchased for use there. When meetings are scheduled in the room, the phones would be plugged in and placed on a table outside of the room.

(3) Two public pay phones be placed on the ground floor between the cafeteria and the entrance on 17th and G St.

There is No General Staff Orientation to the White House

- New staff members are regularly joining the Administration.
- There is no formal orientation program for people who office in the White House Complex.
- The quality of information people receive about benefits, facilities, rules, procedures, and supports varies greatly from office to office. There is no way, aside from written material, to insure every employee gets the same starting information about policies and procedures, legal concerns, and even how to get help.

Recommendation:

- (1) There should be an orientation program established on a bi-weekly basis for new staff members, regardless of level. The program would cover basic rules and regulations (e.g, procurement, security, WAVES), legal interests facing individuals working in the EOP (e.g., records act), environmental issues, personnel concerns (e.g., payroll, harassment), and other relevant items.
- (2) The orientation program should be a requirement for all personnel joining the EOP, regardless of position. It should last no more than one-and-a-half hours.
- (3) The program should include a brief tour of the OEOP (where things are as well as the history), NEOB, and White House. Not only will a tour introduce people to the complex but it will also serve as an initial "perk" for new employees.

GSA is seen as a Poor Service Provider

- Any number of people have complained about issues related to GSA services such as:
 - dirty and unattractive bathrooms
 - poor response time (people call over and over again for services)
 - unclear instructions about who to call for what repairs
 - inaccessibility on holidays for repairs
 - poor quality work when an Office doesn't supervise GSA workers
 - furniture movers "destroy" furniture during moves

The GSA does not currently conduct adequate customer service appraisals.

Recommendations:

- (1) The GSA needs to establish a single number for all maintenance calls in the Complex. It should be the one listed in all directories.
- (2) The GSA needs to explore and then initiate an ongoing customer service appraisal program. Possible techniques might include:
 - a customer calling program: call "customers" 24 hours after any repair is done seeking comments about their services (e.g., "done right?" "handled courteously?" "fast enough response time?" "cleaned up afterwards?").
 - a customer visit program: they should conduct regular customer interviews with each office on the quality of their services.

(3) The GSA needs to track its response time on repairs setting realistic goals and then establishing a public track record for meeting them.

(4) The GSA needs to benchmark their services against private sector suppliers

- in terms of response time
- in terms of quality evaluations
- in terms of pricing

(5) The GSA needs to pay special attention to public restrooms in high traffic areas in the buildings.

- cleanings must be more frequent
- inspections must be conducted frequently
- renovations should be completed as soon as possible on the first floor and ground floor restrooms in the OEOB (these receive the greatest traffic and are the most public)

(6) The GSA should devise a regular proactive maintenance rotation for certain problems. For instance, during the summer a person should go through each office and briefly inspect air conditioners.

Some Offices (Mostly on the First Floor of the OEOP) are Dirty and Cluttered.

- Many individuals complained about the "dirty," "unkempt," "almost college dorm-like appearance" of some offices in the OEOP. Most of those noted were on the first floor of the OEOP.

Recommendations:

- (1) A memo from the Chief of Staff goes out to every employee discussing the importance of neatness.
- (2) Each department head should be told:
 - (a) The importance of neatness in offices.
 - (b) If the office is going to stay a mess, close the door.
 - (c) If doors stay open, keep offices looking professional and business-like.
- (3) To maintain appearance, senior members of the staff need to commit to this and then enforce it by memo, visits, and talk.

The OEOB Cafeteria Does Not Satisfy People

- There were numerous complaints about the cafeteria in the OEOB
 - There are a number of environmental concerns about the use of styrofoam.
 - The quality of food is poor.
 - People do like the hour change.

Recommendations:

- (1) The cafeteria needs to complete a service audit. The managers need to spend time talking, in systematic ways, with customers about likes and dislikes. People prefer, for instance, fresh vegetables and want more "health" related foods.
- (2) The styrofoam needs to go away, quickly.
- (3) Structurally, the cafeteria needs to examine the way they process people. During rush periods, for example, there is always a clumping around the soda and juice machines that are placed in a corner.

The OEOB is a Difficult Building to Work Within

- Elevators are slow.
- Building is leaky.
- Signage is non-existent.

Recommendations:

- (1) The signage proposals approved by Watkins in late June be implemented
- (2) The large signs describing room numbers at the two public entrances to the building be redone to accurately reflect office arrangements.
- (3) An additional staff bulletin board be placed in the cafeteria (the only board that currently exists is in a hallway on the ground floor that is seldom used by most staff members).

Clinton Presidential Records Digital Records Marker

This is not a presidential record. This is used as an administrative marker by the William J. Clinton Presidential Library Staff.

This marker identifies the place of a tabbed divider. Given our digitization capabilities, we are sometimes unable to adequately scan such dividers. The title from the original document is indicated below.

Appendix

Divider Title: _____

SUMMARY OF RECOMMENDATIONS

SPECIFIC RECOMMENDATIONS FOR ALL OA OFFICES

Each office creates a customer centered "Bill of Rights" defining specific service standards personnel within that office believes can be met or exceeded

Each office creates two to three customer-based measures to determine their success in providing outstanding service

Measures must be tracked on a monthly basis

Measures must focus on outcomes important to the client

Scores must be reported to Watkins' office

A one-day training workshop be scheduled for each office offering systematic training in customer service

Collect stories of service wins and successes to create "legends and myths" about service throughout OA

Office directors responsible for submitting names and stories of outstanding service to Watkins' office

Watkins reviews materials submitted and selects those who exemplify the best in service

Systematically interview each customer about their needs and wishes every six months

Devise a service marketing strategy

Schedule an internal "trade show" where each office displays its skills, equipment and services for all other offices in the EOP

WAVES FAILS TO MEET PEOPLE'S EXPECTATIONS

Mr. Watkins should meet with Ron Noble (Treasury) to explore options for funding WAVES improvements

Modify/replace relevant system software and hardware to improve system interfaces and to install appropriate safeguards

Move the WAVES Operation to larger and more compatible space

Install equipment at entrances to improve communication between entrance posts and WAVES and between posts and key White House offices

Install drop lines from entrance posts to WAVES

Install a VIP drop line from NW and SW gates and Visitors Center to the Office of Management and Administration

Install a fax machine at the Visitors Center and upgrade printing capability to allow for processing of large lists

Convert the "portable" WAVES node in the Visitors Center to a permanent fixture

Add ports to the NEOB & OEOB entrances to allow for hook-up of portable (temporary) WAVES nodes during heavy use

Institute procedures for WH/EOP staff to greet groups and VIPs at entrances to ensure proper treatment of guests and human resources to handle problems

Issue a rule mandating an office sponsoring a large event or welcoming VIPs provide a permanent staff member at each gate to facilitate entry

Continue efforts to educate WH/EOP staff on proper entrance procedures to reduce the number of mishandled clearances

Mr. Watkins should explore with Secret Service adding flexibility to the clearance process

Build in a "day pass" capability

Allow for "carry over" clearance between buildings

Some deal

UNIFORMED OFFICERS ARE POOR AT PUBLIC RELATIONS

Option 1:

Improve the behaviors and attitudes of officers at the various gates

Officers must be taught that their jobs require both a sense of security and a sense of public relations

Mr. Watkins needs to negotiate with Ron Noble a change in the selection, training and evaluation of officers who work public gates

Mr. Watkins needs to work with Ron Noble on empowering senior officials involved in clearance of visitors to make decisions and/or acquire instant guidance on the appropriateness of admitting dignitaries

Option 2:

Post a "concierge" individual at relevant gates for major entrances and all special events

Individual would be a "greeter" for visitors helping them solve their problems

Individual White House offices having major events or welcoming VIPs need to have a staff member at the entrance to greet guests and facilitate their entry

Office staff members, West Wing receptionist or military personnel should serve as an escort for "important" visitors

Option 3:

Replace the officers operating the WAVES system at the OEOB and NEOB entrances with staff personnel trained in service skills

Officers would remain for security checks and backup

Individuals "checking" visitors in would be trained and evaluated on their communication and service skills

Additional staff cost

Putse

TELEPHONE EQUIPMENT AND SERVICES ARE UNACCEPTABLE

The team tasked with implementing the new phone system must carefully interview every phone user on their preferences, typical uses and dislikes

For each option made available to users, the team should interview some typical customers about their reactions to the option

Every user must be trained on the new phone options

Two months after implementation, a second survey needs to be completed

During the first four months, a regular mailing about phone system alternatives needs to be distributed to all personnel

Memos should: announce different options, teach people how to use their options and remind users of the etiquette involved in using various options

Work with WHCA to improve the quality of phone calls on Air Force 2

Add a switch to the phone in the Oval Office permitting the President to hear his phone ring

In the phone directory, include people's fax numbers and EMAIL addresses

In the phone directory, where appropriate, list a person's scheduling assistant

Jennifer
- telephone calls

TELEPHONE ETIQUETTE IS WEAK OR MISSING IN MANY OFFICES

- A series of phone etiquette short courses (1 hour) be offered for support personnel in all offices
- Interns and volunteers who will be answering phones in offices should be required to attend a one hour training course on phone etiquette
- A monthly memo about phone etiquette be distributed in the form of a "catchy" and well designed "tent card" on phone etiquette
- Top level people, when they encounter poor phone etiquette, must immediately coach caller on proper etiquette

Barbara Walker

THERE ARE "AMBIENCE" ITEMS PEOPLE WANT IN THE WEST WING

- Mr. Watkins' office should explore the possibility of providing a coffee service at different locations in the West Wing
Service would be maintained during extended working hours throughout the week and equipment would be available on weekends and evenings
- News analysis calls each office in the West Wing and ascertains those newspapers which they would like delivered early
- News analysis arranges to deliver selected newspapers by 6:30 AM each day to each office in the West Wing
- Umbrellas should be purchased for the use of people entering and leaving the West Wing, Southwest Gate, Northwest Gate and East Gate
- Awnings should be placed by each outside gate as covers for people waiting to enter the White House and over the East entrance for special events
- Mr. Watkins should use interns and volunteers as "errand" people for the West Wing
- Mr. Watkins should, with the assistance of Interior Design, walk the West Wing to identify suitable locations for plants and flowers in hallways and offices
- Mr. Watkins should arrange to have additional vending machines placed in the West Wing
- The laws associated with different services (e.g., cars) need to be better explained to staff members

Brian

THE AMOUNT OF MEETING AND CONFERENCE SPACE AVAILABLE IN THE COMPLEX IS UNACCEPTABLE

- An index to rooms, sizes and equipment usable and available for each room be included in the Staff Manual
- Copies of the information distributed to people who do not receive the Staff Manual
- A priority system be created favoring early scheduling over last minute scheduling and public meetings over staff and departmental meetings
- More conference rooms need to be created

Reduce NEOB cafeteria to create a large meeting room

510
A CONFERENCE CENTER SHOULD BE ESTABLISHED IN ONE OF THE TOWNHOUSES ON JACKSON PLACE

One of the townhouses in the Jackson Place be modified into a White House Conference Center

Because there are no clearance problems for those buildings, having a meeting center in one of the buildings allows easy access in and out of the building
Jackson Place townhouses are seen as having status; they have a look of class, a feel of history and a location that most envy

The Conference Center include a kitchen for food service

The Conference Center contain all the necessary materials to hold meetings and conferences

The Center be assured of high status by early scheduling of some important "internal" meetings of White House staff members

- Daniel

Brian
MEETING PLANNING NEEDS IMPROVEMENT

Planning for major external meetings within the OEOB should be coordinated by a single office within Room 1

Sufficient interns and volunteers should be assigned to perform many meeting tasks

A formal meeting planning office also supports, and may serve as, the "concierge" operation

Where possible, meetings ought to be scheduled at irregular times to control overcrowding and congestion at the entrances to the building

Each office needs to appoint one person as that office's "meeting planner" to coordinate with OA personnel on meeting plans

511
GARNERING INFORMATION ABOUT SERVICES IS DIFFICULT

Create a Customer Information Center (An "ANSWER CENTER" for the White House)

Create a single office and telephone number for all information referrals

Office will be staffed during extended working hours throughout the week and on Saturdays

Personnel will serve as a White House "concierge" providing callers with answers to questions about support services as well as aiding callers

Services will be limited to information

An extensive data base will be maintained tabulating such things as the sorts of requests for information people make

The Center may also serve as a complaint department about services

The office should operate directly out of the Assistant to the President for Management and Administration

People working the phones need to be trained in phone skills, knowledgeable about the White House and the community and notorious for memory skills

A Staff Manual needs to be produced immediately

A Staff Directory needs to be completed immediately including staff members' room addresses, telephone numbers, fax numbers and EMAIL addresses

Patsy

ELECTRONIC MAIL IS WEAK

A better, more sophisticated, EMAIL system is necessary

Regularly scheduled short courses on EMAIL need to be offered

Readable written materials on using the EMAIL system should be available to all users in both hard copy and through the computer

High priority needs to be placed on connecting offices to the OASIS system

The goal must be that every office within the EOP be connected

Cabinet officers (and their direct reports) need to be connected to White House EMAIL system

The goal is an "electronic campus" where every office is connected to every other office

Patsy

PEOPLE NEED BETTER TECHNOLOGY SUPPORT (SOFTWARE & HARDWARE)

People responsible for technology support need to interview every major office asking them about their software needs

A checklist of available software needs to be created to aid people in identifying needs

A number of offices should be supplied with data base software focused on their specific needs

Scheduling software should be developed

A series of short "macros" should be written and made available to all

The macros would solve user problems with the current system

Interviews with users should identify the key macros

Software must be customized for each office

IRMD will need to visit with an individual office, determine their software needs, customize the software and then provide training and support

A major initiative should be the replacement of paper forms with electronic forms

Other software needs to be created for specific offices

Certain types of hardware should be available on a "check-out" basis

People would like faster, more sophisticated hardware in the form of computers, local area networks and printers

Certain "special" technologies need to be created for the EOP

COMPUTER SERVICES MUST BECOME MORE CUSTOMER ORIENTED

IRMD must visit each major office on a regular basis to determine customer needs

Every six months a representative of IRMD should make a "client call" on each office assessing their software, hardware and training needs

People within IRMD should be assigned as advocate-assistants to each office

Accessible training should be available in the form of short courses, reading materials and hand-outs

On-site training must be done - it is more time consuming and expensive but it offers greater customization, greater accessibility and greater participation

The "help" number for IRMD needs to be attached to every computer, monitor and printer in the complex

MANY SUPPORT SERVICES ARE NOT CUSTOMER-CENTERED

The Personnel Office design an understandable and readable summary of people's pay and benefits

These statements should be sent to each employee along with a telephone number to call to clarify anything

The Personnel Office should conduct client visits with various departments seeking to help them better understand the Personnel Office's function and role

WHCA, the Chief of Staff, the First Lady's and Vice President's Chief of Staff meet and reach agreements on what WHCA can and cannot do for various offices

If WHCA is unable to provide necessary support for the First Lady's and the Vice President's offices, then some other office needs to assume responsibility for ensuring that the communication needs of both offices are met

WHCA needs to conduct interviews of their "customers" to ensure the services they are providing are in line with their customer's expectations

A standard for an average reimbursement time should be established and should be less than 10 days after submission to an officer's administrative officer

The processes involved in the reimbursement process need careful examination

Time delays should be identified and rectified

Create a Central Service Center for equipment, maintenance and repairs

Create a single office and telephone number for all service requests

Office should be staffed 24 hours a day

One telephone number should be listed for all repairs, maintenance and equipment services

Personnel working in this office will be drawn from GSA

Personnel working this number should exude skills related to service

An extensive data base must be maintained tabulating such things as sorts of requests and time to completion

Summary of the data collected should be sent to the AP for Mgmt. and Admin. on a monthly basis who should send a copy to the Dir. of GSA

A separate number should be used for computer services and should be posted on every computer

OFFICES DON'T TREAT OTHER OFFICES LIKE CUSTOMERS

Paul Meetings should be held among various offices who serve as each other's "customers" and "suppliers"

There should be a central calendar of important briefings and public meetings maintained by the office of the AP for Management and Administration

The office of the Assistant to the President for Management and Administration should play an informational, trouble-shooting role
It should be the "conscience" of the White House--a listening post for concerns staff members have with the organization

THE VOLUNTEER AND INTERN PROGRAMS NEED CONSISTENCY AND BETTER DEVELOPMENT

Given the central place of volunteers within the EOP, the Volunteer Office should be strengthened significantly in terms of personnel and funding

The office needs a permanent secretary/receptionist to work with volunteers, know every office's needs, and coach offices to use volunteers appropriately

The office needs better technological support in terms of computers and software

The office needs an interviewing room to meet and assess volunteer capabilities

A "feeder" system for volunteers needs to be refined

When recruiting, use outstanding current volunteers to find others and develop long relationships with civic organizations, schools and other groups

In an optimal environment, the office would have some groups "on call" when special needs arose

An in-depth interview, a formal orientation and written materials need to be created for volunteer selection and training

The Volunteer office needs some way of getting access to vacant rooms within the OEOP

Mr. Watkins should instruct Sig that any time a room is going to be empty for more than three days, she notify the volunteer office

The Volunteer office can use the room as a temporary room for volunteer

Any available space within the building needs to be "loaned" on a day-by-day basis to the Volunteer office

Regular motivational activities need to be scheduled for volunteers

An internal appraisal should be conducted of each "regular" volunteer's performance and each office's use of volunteers

The Volunteer Office needs to interview each office that uses "its volunteers" to determine their needs and its success in matching volunteers to offices

The Volunteer Office needs to be moved to a location closer to the 17th and G Street entrance

Every office needs to be instructed to send their volunteers through the Volunteer office

A separate V badge needs to be created similar to the A badge

Significant attention must be paid to bolstering Fall, Winter and Spring internships within the EOP

Work with academic institutions to create and maintain consistent links with the EOP for internships

Create a cadre of academics within the D.C. area who create courses providing interns with academic credit for their work in the EOP

Each major office within the complex needs to identify an intern coordinator

The Intern Office should collect exit data from interns including an evaluation of the program and the intern's perceived role and learning experience

The Intern Office should collect exit data from each office that used interns about the suitability of the intern(s) for the office and the program in general

The manner in which interns and volunteers are cleared into buildings needs improvement

A hard badge designed especially for interns and volunteers needs to be created

It wouldn't need a picture

It could be reused by different people over time

Parker
THE VISITORS SYSTEM FOR TOURS IS WEAK

Large signs by each gate telling visitors where to go for tickets

Large historical maps be placed on the fence of each side of the White House to inform visitors of what they are looking for

Printed material about the White House should be available for people at all times near the Visitors Center

The National Park Service improve forecasting information about wait time and about the availability of tours

Printed material should be produced for children

Printed materials either on the fence or ground telling people interesting information about the White House while they wait in line

Small printed material interspersed throughout the tour about objects, paintings and history

Signs need to be consistent, readable and informative

Mr. Watkins needs to work with Secret Service on improving the communication skills of officers when dealing with questions from visitors

Written materials be placed at the end of tours offering information about the White House for people who have completed the tour

A sign be posted telling people that books, postcards, etc. are available across the street at the White House Society office

A monthly evaluation be conducted of the tour by the Visitor's office

Evaluation would include surveys of visitors as well as "mystery" visitors and sent to Mr. Watkins

Mr. Watkins will instruct the Park Service, Usher's office, GSA and Secret Service to include representatives from the Visitor's office and Social Secretary's office on all teams focusing on the White House

Mr. Watkins works with the President, First Lady, Vice President and Mrs. Gore encouraging them to randomly stop by during visiting hours to greet visitors

Explore adding a corps of professional volunteers to the public tour process

A guide can be stationed in each room and give a continuous monologue on that room

Officers would be for security only

More specialized tours need to be designed and conducted and more of these tours need to be created

Each of these should be by special invitation of the President and the First Lady

The "diversification" issue for special tours should be modified

The Visitor's office needs to return to the "first come, first serve" process

A direct statement by Mr. Watkins needs to be made to all relevant parties that the Center is top priority for maintenance

One office within the White House needs to be assigned total responsibility for maintaining the physical environment in the Visitors Center

A team needs to be quickly established to refurbish the Center

Mr. Watkins' office needs to coordinate the team

The team should include the Visitor's office, Social Secretary's office, Usher's office, Secret Service and the National Park Service

The team must be given a specific goal, given a short time span and told that this matters mightily to the top people in the White House

After one week, Mr. Watkins checks on progress

After two weeks, daily updates are required

Additional equipment be purchased for use during major events including more computer lines to WAVES as well as telephones

The Chief Usher should instruct the Park Service to repaint the guard houses

The Chief Usher should order an inspection and repair, where necessary, of the floors in all guard houses

The Chief Usher should order an inspection and repair of ceiling leaks

The purported "regular" maintenance and painting schedule must be significantly improved

The Park Service should design and install awnings at each guard house where visitors must stand and wait for clearance

VISITORS (BOTH PUBLIC AND INVITED) NEED SOMETHING TO TAKE WITH THEM

Attractive written material needs to be produced for every special tour highlighting the role of the President

For Congressional tours, a pamphlet about the White House should be distributed

For Members' tours, a folder including a letter from the First Family, a pamphlet and a souvenir photograph needs to be distributed

For special tours, a special packet needs to be created depending upon the visiting group or topic of the tour

Special written material needs to be produced for children visiting on special tours

A few special inserts be written about the White House that may be included in any sort of program used by the Social Secretary's office

A "status" list of trinkets needs to be created

A limited distribution memo goes out to every Department head describing what is available, how to get it and when it is appropriate to use

A central repository for trinkets is created and a log kept of the use by different offices

Something very inexpensive needs to be available to all offices as a "treat" for visitors (e.g., cardboard coasters)

Brain

EVENT PLANNING FOR SOCIAL ACTIVITIES IS POORLY SCHEDULED

Each office needs to create a yearly schedule of planned events

Each office planning events involving the Social Secretary should meet with her office to discuss planned events and logistics needed for the upcoming year
These meetings need to be coordinated by the Staff Secretary's office

The Social Secretary's office needs to collect data on how far ahead every event was planned by a major office

The Social Secretary should record how long they had to prepare for the function

At the end of each quarter these results should be forwarded to Mr. Watkins' office

The Scheduling office needs to be willing to make scheduling commitments earlier for key personnel in the White House

When an event is being held, someone from the office holding the event must be at the gate where invitees enter to clear last minute invitees

Notes (Add)

MAIL IS NOT ALWAYS DELIVERED PROMPTLY OR THOROUGHLY

There should be an expedited system for mail service to different offices

Each office, in correspondence with writers, should ask writers to use a certain address or number to speed processing of mail

Each administrative officer is reminded about the importance of distributing memos to everyone in the office

For memos judged legally, politically, or otherwise important, a specific name and address label be placed on each one prior to distribution

Electronic mail be used more readily for purposes of communicating important information

SENIOR STAFF MEMBERS FEEL THEY NEED MORE SECRETARIAL SUPPORT

An audit should be conducted of the specific secretarial needs of each senior officer

Those needs should be tabulated, used as a general guide to staff needs and used in placing new personnel in offices

A questionnaire should be created for individuals who may be placed in positions akin to secretarial ones
The questionnaire should assess each individual's competencies in a variety of secretarial tasks

Jennifer - curriculum (w/Daley)

STAFF MEMBERS ARE NOT WELL TRAINED ON A VARIETY OF IMPORTANT SKILLS

The AP for Management and Administration should institute a series of short courses on a variety of management-related topics
The courses should be relatively brief (no more than half-a-day) and offered to personnel in every department
Certificates should be distributed upon completion of each course

Topics for the courses should be devised from a survey of the leadership of the Administration and will only be successful if those individuals perceive a need

Instructors should be selected nationally based upon reputation, teaching skills and practical knowledge

Offices under the aegis of the AP for Management and Administration should implement a 40 hour per year training requirement for all personnel
Every employee should receive 40 hours of training per year

ADMINISTRATIVE CONTACTS WANT MORE ATTENTION

A monthly meeting should be held for the Administrative Officers within the EOP

The meeting will be chaired by Mr. Watkins

Each meeting will include an informational update by Mr. Watkins and reports by each Administrative Officer of issues she or he is facing
The goal is information sharing

OFFICES WANT THEIR OWN BUDGETS

Each office needs to create and maintain a budget for items specific to their interests
General items should be maintained separately for the entire EOP

THERE IS NO SERVICE CENTER FOR WHITE HOUSE EMPLOYEES TO ENJOY WASHINGTON

A staff member within Mr. Watkins' office be appointed who will be responsible for coordinating recreational staff activities

The White House should explore creating an "employee recreation association" to negotiate "bulk" contracts for various activities in Washington

The office would also arrange typical "office management" items

A series of informative lectures about Washington, political issues, cultural interests and policy concerns be offered for staff members

The lectures should be scheduled once a month on a Friday at lunch time
The speakers should be "names" who offer informative and interesting presentations
A preliminary discussion of this needs to be conducted by senior Administration officials

PEOPLE NEED MORE NON-COMPUTER EQUIPMENT

On a quarterly basis staff members from the Office of Administration conduct an equipment audit
Six telephone jacks should be installed outside of Room 450 and six phones purchased for use in that space
The telephone jacks currently installed outside of Room 450 (in the clock room area) need to be activated and six phones purchased for use in that space
During meetings in Room 450 with members of the public, the six phones should be plugged in for use by the people attending the meeting
A number of telephone jacks be installed outside of the Indian Treaty Room and phones purchased for use there
When meetings are scheduled in the room, the phones would be plugged in and placed on a table outside of the room
Two public pay phones be placed on the ground floor between the cafeteria and the entrance on 17th and G St.

THERE IS NO GENERAL STAFF ORIENTATION TO THE WHITE HOUSE

There should be an orientation program established on a bi-weekly basis for new staff members, regardless of level
The orientation program should be a requirement for all personnel joining the EOP, regardless of position
The program should include a brief tour of the OEOP, NEOP and White House

GSA IS SEEN AS A POOR SERVICE PROVIDER

The GSA needs to establish a single number for all maintenance calls in the Complex and listed in all directories
The GSA needs to explore and then initiate an ongoing customer service appraisal program
The GSA needs to track its response time on repairs setting realistic goals and then establishing a public track record for meeting them
The GSA needs to benchmark their services against private sector suppliers in terms of response time, quality evaluations and pricing
The GSA needs to pay special attention to public restrooms in high traffic areas in the buildings
Cleanings must be more frequent
Inspections must be conducted frequently

Renovations should be completed as soon as possible on the first floor and ground floor restrooms in the OEOP

The GSA should devise a regular proactive maintenance rotation for certain problems

SOME OFFICES (MOSTLY ON THE FIRST FLOOR OF THE OEOP) ARE DIRTY AND CLUTTERED

A memo from the Chief of Staff goes out to every employee discussing the importance of neatness

Each department head should be told the importance of neatness in offices

If the office is going to stay a mess, close the door

If doors stay open, keep offices looking professional and business-like

To maintain appearance, senior members of the staff need to commit to this and then enforce it by memo, visits and talk

THE OEOP CAFETERIA DOES NOT SATISFY PEOPLE

The cafeteria needs to complete a service audit

The managers need to spend time talking, in systematic ways, with customers about likes and dislikes

The styrofoam needs to go away, quickly

Structurally, the cafeteria needs to examine the way they process people