

Gen-

let's

discuss

June 8, 1995

Erskine --

I understand that John talked to you last night about the Staff Secretary having been left off the list of the Long Term Issues Meeting and that this was apparently just inadvertent.

Could you rerun the memo with Staff Secretary on the list?

If the omission was not just inadvertent, we obviously need to talk. At the risk of belaboring the obvious, the job of this Office, in a nutshell, is (a) making sure that paper going to the President is substantively sound and reflects current White House thinking politically and in terms of message; (b) coordinating the comments of relevant senior staff on paper going to the President; and (c) presenting paper in a clear and concise form to the President. We can't do this job unless we are as fully up to speed as possible about what is going on in this building from a substantive, political and message standpoint. Thanks.

Todd Stern

2000

Meeting 11/9

1. EB, GS, BR, MH, DB, RK, KH, BN, AH-SS, JG, KH, JT, JD, TZ
→ RE, MM, JH, MW, GS, AH

2. happy, proud, shocked. Helpful to meet - re-elected
this president - "no wh. D's."

3. diffs w how work -
search/clarity of resp / acct'blity.

were empowered → push
back to p councils, etc.

4. Memo

- a) mission statement (for dept) - hold acctble / judge success
- b) ^{brief} job descriptions for @ trust & people -
- c) ^{adapt} tools to accomplish mission - properly eqppd.

↳ by Fudy - 3 pgs.

d) areas of current overlap w/ other depts →
urgent problem.

e) how well or coord. w/ other w/ depts to
be more effective.

f) how communicate better -- w/ a dept;
w/ outside groups; w/ WH + Cabinet / ag's;
w/ municipalities

g) how full fulfill mission - if not, why not

h) meetings - some critical > tell me what helpful to me.

i) need goals - what P remembered for in history - over next 4 yrs > 2. What plan to do to help accomplish goals.

- PC- hydroxy

französisch

have articulated & considered

p2 has to learn
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political tactic trying to
etc. &

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A Govt. neither
distinguish from social, econ. probs of
working people nor depending on big budget
big govt solns but rather 4
engaged govt that marshals its resources
best uses wisely profit.

Contrary view: It is merely opportunistic rather really lib'l & betrayed his beliefs in adopting half budget welfare incrementalism - on health care, foreign immigration etc or no beliefs other than seeking Bojw - He passed in '92 but he cheated 3rd way.

res. off. Government

THE WHITE HOUSE
WASHINGTON

November 24, 1996

MEMORANDUM FOR ERSKINE BOWLES

FROM: TODD STERN 

SUBJECT: Staff Secretary's Office -- Mission, etc.

This memo sets forth (i) the basic mission of the Staff Secretary; (ii) job descriptions for key personnel; (iii) coordination with other offices -- particularly how the Staff Secretary could be better integrated with the Chief of Staff's office; (iv) tools to get the job done most effectively; (v) meetings; and (vi) the President's legacy.

Basic Mission

The job of the Staff Secretary is to manage the flow of paper to and from the President. This includes (i) making sure he gets what he needs when he needs it while not overloading him; (ii) disposing of matters which require his signature but not his attention; (iii) summarizing material in clear and concise form both to save his time and to sharpen issues for decision; (iv) coordinating senior staff comment on decision items; (v) making sure paper going to him is sound in terms of substance, message and form; (vi) routing paper back from the President to appropriate staff. Since this Office is the last stop before action items (decision memos, Executive Orders, Directives, signing statements, veto messages, correspondence, etc.) go to the President, we also have a "goalie" function -- preventing mistakes that have slipped through other lines of defense.

Job Descriptions

Todd Stern. All paper to and from the President routes through me. I either handle it myself or assign it to one of my deputies, Phil Caplan or Helen Howell. I decide what we're sending to the President and when, circulate significant memos for senior staff comment, write summaries of major decision memos, review and edit signing statements, veto messages, proclamations, important correspondence, etc., and review summaries and other work done by Phil and Helen. I also oversee the offices of the Executive Clerk, Correspondence and Records Management.

Phil Caplan/Helen Howell. Phil and Helen work on the full range of matters that come to our office and have particular responsibility for overseeing preparation of the President's daily and trip briefing books. Phil also does the initial review and edit of personal correspondence and Helen does the same for congressional correspondence.

Coordination with Other Offices

Chief of Staff. The Staff Secretary could be more integrated into the Chief of Staff operation. In past White Houses, under both Presidents Reagan and Bush, the Staff Secretary was formally part of the Chief of Staff's office (as a deputy Chief of Staff or a deputy to the Chief of Staff). While I am not proposing that, the logic of greater integration is clear. The Staff Secretary is in the best position to keep the Chief of Staff (and his deputies) fully briefed and informed on what paper is coming through the pipeline, what paper will require the President's attention, what will require the Chief of Staff's input before going to the President, and what may require further discussion or revision before going to the President.

There are two ways to keep the Chief of Staff briefed in this manner: (i) hire a person in the Chief of Staff's office, recognizing that he or she will be duplicating for the Chief of Staff some of what the Staff Secretary is already doing for the President; or (ii) make the Staff Secretary a more integrated part of the Chief of Staff's operation. I would argue for the latter as a better use of resources, provided that the Chief of Staff controls who the Staff Secretary is and is fully comfortable with having the Staff Secretary act as one of his advisors.

Playing by the Rules. In order for the Staff Secretary to modulate the flow of paper to the President, ensure that paper is ready for the President's review, and give senior advisors an opportunity to comment, paper has to come to us in the first place. There is an eternal temptation in all White Houses for people to hand things directly to the President. But end-runs serve no one. Periodic reminders from the Chief of Staff can help control this.

Briefing Books. Materials for the President's daily briefing book still routinely come in late, delaying our ability to get the book to the President at an appropriate hour -- 8 pm. There is generally no reason why our 6 pm deadline for submitting materials to our Office shouldn't be met. Better discipline is certainly possible; the question is whether the President cares about this or is satisfied with the current state of affairs -- both with regards to timing and content.

Speeches. Speeches too often come to us very late, making meaningful staffing difficult. This may be because the speechwriters get the assignment late. But the result is the same -- inadequate chance for us to review speeches and circulate them. The speechwriters often do some informal circulation of their own before sending speeches to our office, but that isn't a dependable way to make sure all the right people have had an opportunity to comment. The only way to cure this is for speech drafts to come to our office earlier.

Tools

The main tool of the Staff Secretary is information. When I prepare summaries of decision items for the President, I need to capture the state of play on an issue and where advisors stand in an accurate and nuanced manner. The only way to do this is to be included as a matter of course in substantive meetings on matters that require or will require Presidential decision.

Meetings

In my view, the 7:30 am meeting has been very useful; the 8:15 am meeting has not. I would consider a single meeting of only assistants, assuming you feel comfortable that such a gathering would be small enough to function as a real working meeting. If it is deemed useful to have a brief "readout" meeting for deputies at 8:30 am, you could have one of your own deputies chair that. No person, other than the chair of the deputies meeting, would go to both meetings.

The President's Legacy

At a broad, philosophical level, I think President Clinton is most likely to be remembered for having fashioned a "third way" politics based neither on big government, deficit spending solutions, nor on anti-government abdication, but on an engaged government that recognizes its limits while still marshaling its resources to tackle the real problems facing the nation -- a politics in tune with the essential moderation of the American people and one which has, not incidentally, resuscitated the Democrats as a Presidential party.

The contrary, cynical view of the President is that he is an opportunist who veered right in 1995 merely as a tactical, maneuver. The extensive discussion by consultants about tactics hasn't helped the President in this regard. But the truth is that in 1992, long before "triangulation," Bill Clinton won the Democratic nomination and the Presidency on an explicit "third way" platform that set him apart from both liberal Democrats and Republicans. In my view, the President's legacy will rise or fall on whether he continues to articulate and implement this third way approach successfully. I see two issues as paramount.

Budget deficit. First, the President must continue progress toward a balanced budget -- including entitlement reform. The President's pivotal decision in his first term was to embrace real deficit reduction, which led to lower interest rates, increased investment and a healthy economy. Continued progress will be tough, but it is important for the economy, for the Democratic Party (which had lost credibility as an economic steward before Bill Clinton came along), and for the President. Making government work while living within our means is central to what the President's third way, vital center governance is all about.

Welfare/Jobs. "Ending welfare as we know it" was one of the President's signature promises in 1992, representing the "responsibility" part of his third-way "opportunity and responsibility" message. His critics on the left and right view his signing of the welfare bill as an expedient capitulation rather than a principled gamble aimed at ending a bankrupt system. It is important for the President's legacy that he fight *not* to roll the bill back but to make it succeed. Now that Republicans can no longer attack us for propping up a failed system, the President should have the moral high ground to lead a national effort to put people -- especially in the cities -- to work. By contrast, large increases in homelessness or child poverty would badly damage his legacy. A spotlight will inevitably be focussed on the effects of ending this historic entitlement.

THE WHITE HOUSE
WASHINGTON

July 21, 1995

MEMORANDUM FOR EVELYN LIEBERMAN
GENE SPERLING
JEREMY BEN-AMI
KAREN HANCOX
FRED DOHSE, NSC
BRIAN JOHNSON, CEQ
ALLISON WILKIE

FROM: TODD STERN *TS*
PHIL CAPLAN *PC*

SUBJECT: Briefing material for press interviews

Thank you for coming to the recent meeting in our office. To summarize the conclusions reached:

- Qs and As and other briefing material for press interviews should continue to be submitted to the Press Office, which will in turn get it to our office. Where there is adequate notice, material should be submitted to the Press Office two nights before the event, so that Press can do whatever editing is needed and get a finished product to our office between 4pm and 6pm the night before the event.
- The policy councils will be responsible for preparing Q's and A's and other briefing information. The Press Office and Cabinet Affairs will no longer solicit material directly from the agencies. If the councils need additional materials, they will contact the agencies, but will still be responsible for editing down the material they get.
- Persons preparing Qs and As should focus only on issues which have some reasonable likelihood of getting asked. When we are over-inclusive, we end up giving the President more material than anyone could digest.
- The suggested answer to each question should be kept short - no longer than an answer you think the President should actually give. It isn't useful to suggest answers that go on for a page or longer; we have to be selective. Additional information that might be helpful to the President should be clearly labelled as "Background" and can follow two or three lines below the answer.

- Where appropriate, responsible offices (e.g. NEC, NSC, environment, DPC, Political), are encouraged to submit, on a separate page, a brief synopsis of the positive message you think the President should communicate in his answers.

Please let us know if you have any questions.

cc: Leon Panetta
Erskine Bowles
Harold Ickes
Mike McCurry
Lorrie McHugh
Julie Mason
Laura Tyson
Tom O'Donnell
David Lane
Carol Rasco
Tony Lake
Andy Sens
Doug Sosnik
Kitty Higgins
Steve Silverman
Katie McGinty
Shelly Fidler

THE WHITE HOUSE
WASHINGTON

February 3, 1995

MEMORANDUM FOR ERSKINE BOWLES

FROM: TODD STERN *TDS*

SUBJECT: Staffing needs for Staff Secretary's Office

This is a follow-up to our conversation Wednesday about the staffing needs of our office. I know John has already talked to you about this, and I wanted to add my perspective.

We need a total of five full-time people (which is the way this office has been staffed since the Bush Administration): (i) Staff Secretary; (ii) Deputy Staff Secretary; (iii) a substantive assistant; (iv and v) two Administrative Assistants. (Our two Administrative Assistants, Fran Wessel and Sharon Wagner, work in shifts, covering the office from 7 am until after midnight. They are superbly competent and work full tilt.)

Why we need to fill the third slot. Until Paul Richards left in October, the third slot was filled by a second Deputy. I don't think we need anyone as senior as Paul, but we definitely need someone to pick up much of his work load, including, among other things, reviewing and editing **Presidential Messages, Proclamations, and non-congressional correspondence**, as well as and having front-line responsibility for the President's daily briefing book.

In addition, as John and I have discussed with you, there is substantial room to shorten, sharpen and improve the President's briefing book, especially on trips. But this will require a good deal more work on our part. For trips, we have made two proposals: first, that we prepare an **overview memo** laying out the rationale for the trip -- why the President is going, what we hope to accomplish, what the message is; second, that our office oversee preparation of a **single, unified briefing memo** for the state the President is visiting, combining what are now separate memos on political affairs, economic issues, cabinet affairs and local issues.

I think trip books put together like this would be a clear improvement for the President, but we couldn't begin to do this without a third substantive person.

My idea for the third slot would be a bright, young person with good political judgment, strong analytic/writing ability and good interpersonal skills.

June 15, 1995

MEMORANDUM FOR LEON PANETTA

FROM: TODD STERN

SUBJECT: Long Range Plan

11/21/96
notes

First, please excuse the tardiness of this memo. It results mostly from the short-range reality that I've been buried trying to (a) keep a lot of paper moving, and (b) hire staff (Phil Caplan as the new deputy and Carol Cleveland to replace Fran, with a new third person yet to be hired). That said, let me turn to the principal issues.

Paper Flow

The flow of paper to the President, especially information items, has been increasing substantially in recent months. We have already implemented certain measures to consolidate paper, but we need to do more -- the President is getting overloaded and has expressed his frustration on several occasions.

I plan to do a general memo to senior staff to urge, once again, that everyone try to limit what they send him. In addition, I plan to meet separately with particular offices, such as Political and Cabinet Affairs, to talk about ways to consolidate and limit the flow.

Press Conferences/Interviews

Talk to
Phil

On many occasions, the material we provide the President for press conferences or significant interviews is excessive. For the "Larry King Live" interview, 84 pages of domestic briefing material was submitted to us.

The typical process is that White House staff collects material from agencies and forwards it to us (via the Press Office). It would be more effective if White House staff received material from agencies at least 24 hours in advance (unless it's a last minute event) and then boiled it down so the President got what he needs -- for example, a half to one page of concise Qs and As on a subject rather than four or five pages. I plan to convene a meeting with key people from the Press Office and policy shops to go over this; I have already discussed it with Press.

Briefing Books

We need to tighten this process up. Papers are coming in too late -- often after 8 pm -- which means both that the book gets to the President later than it should and that our Office has little opportunity to have papers fixed that need fixing. Our aim is to have relevant staff submit briefing materials to our Office by 4 pm the day before the event if possible and by 6 pm at the latest.

Trip Books

John and I talked to Erskine a while ago about making some changes to the President's trip books.

Overview. First, we proposed adding to the trip book a brief overview memo laying out the rationale for the trip -- why the President is going, what we hope to accomplish, what the message is. In essence, a domestic analogue to the "Scope" memos he gets for major NSC events. Our office would prepare this memo.

Background Section. Our office should oversee preparation of a single, unified briefing memo for whatever states the President is travelling to, combining what are now separate memos on political affairs, economic issues and local issues. The initial work on this briefing would still be done by NEC, Political, and Research, with assistance from Cabinet Affairs if necessary. We would continue to provide separately the one-pager the President now gets from NEC on a given state's economic progress during the Clinton Administration.

Additional sections of the memo (or, in certain cases, separate memos) pertinent to specific events or states would be included on an as needed basis -- for example, on immigration, timber, etc.

Travelling

In recent months, because we've been understaffed, we haven't filled our traditional role of travelling on overnight trips. All Staff Secretaries in recent memory have gone on such trips (i) to handle paper coming in from the White House, (ii) to make sure the following day's briefing book is complete and distributed to relevant senior staff, and (iii) to handle paper coming back from the President so that copies get made for relevant staff and the paper gets properly archived. I think it makes sense for our office to resume the practice of travelling on overnight trips where possible.

Feedback

It would be helpful for me to get a couple minutes with the President at some point -- perhaps after John leaves and I officially assume my new duties -- to get a little feedback. For

example, it would be useful to know if the President has any views about (i) the volume of paper he is getting generally and the amount he is getting from particular offices, like Political and Cabinet Affairs; (ii) his daily briefing book and trip books; (iii) the nature and amount of materials prepared for large events such as economic conferences and town meetings and (iv) the way we are now packaging and summarizing information memos.

Last Thought

I have a last thought which I am not actively pressing, but offer up in case you and the President think it might be helpful. One way to clear through a lot of paper without sending it all to the President (even in summarized form) would be for me to spend a few minutes with him every week (perhaps along with Nancy Hernreich) going through various memos, letters, reports, etc. I could tell him orally, and very briefly, what each one is about, providing him only with the ones he wants to see. The upside would be that he wouldn't have to look at quite so many nagging folders in his inbox. The downside is that you'd need to build another 15 minutes or so into the weekly schedule -- although, in theory, the President would save more time by not having to read as much. Of course, the President might not care to do this in any event. But if you and he think it would be useful, we could try it out.

cc: Erskine Bowles
Harold Ickes

THE WHITE HOUSE
WASHINGTON

August 10, 1995

Senator Jesse Helms

DATE: Friday, August 11, 1995
LOCATION: Yellow Oval Room
TIME: 2:00pm
From: Patrick J. Griffin
Wendy Sherman

I. PURPOSE This is a meeting requested by Senator Helms.

II. BACKGROUND S. 908 - The Foreign Relations Revitalization Act of 1995 - was on the Senate floor July 31 and August 1. It was pulled down by the Majority Leader after two cloture votes failed. Senator Helms, the manager of the bill, believes that the Democrats were solely responsible for the failure of the bill. He believes that he was forced to file cloture even before debate began because the Democratic leadership said they would not allow a vote on the bill. In fact, Senator Dole was never enthusiastic about the bill knowing it would consume a great deal of contentious floor time. Over 140 amendments were filed, about two-thirds of which were Republican amendments.

The defeat was a very difficult one for Senator Helms who has tried to demonstrate that he can be an effective Chairman of the Senate Foreign Relations Committee. It was also extremely difficult for his staff who had invested an enormous amount into crafting a comprehensive consolidation of the foreign affairs agencies that they loudly announced, in a February 14 op-ed by Senator Helms and at a press conference March 15, would occur with or without the Administration's or Democratic Members' support.

Democratic Members were initially of a variety of opinions about the legislation. In an early meeting with the Vice President, several members expressed a desire for some movement on consolidation. However, even though Senator Kerry, the Democratic manager, tried to fashion a compromise at markup with Senator Helms, he was soundly rebuffed by Helms and ultimately led the charge to prevent the bill's consideration on the floor.

As you know, the Administration, in fact, quite forcefully opposed the bill. The Secretary recommended a veto to the

President because the bill had numerous restrictions on the President's ability to conduct foreign policy, did not provide sufficient funds with which to conduct foreign policy, and, of course, mandated consolidation of AID, ACDA and USIA into the State Department. The latter proposal not only had been rejected by the Vice President's NPR process, but undermined the President's prerogative to decide how to best organize to conduct foreign policy. On July 26, citing these reasons, the President issued a statement saying he would veto the legislation in its present form.

On Thursday, August 3, Senator Helms placed a call to Erskine Bowles and another to Wendy Sherman to explore ways that we might be able to work together to reach agreement on a bill. The call to Erskine resulted in this meeting. That same afternoon, Ms. Sherman went to see Senator Helms at his request and subsequently took a call from Admiral Nance, the Committee's staff director. Both asked if we were interested in a dialogue. After consultation with the Secretary of State and many others in the Administration, an exchange of letters took place to confirm a dialogue would be in order.

There is no question, however, that reaching an agreement will be extraordinarily difficult. Even if Senator Helms is willing to delete many of the objectionable foreign policy restrictions, he cannot improve the authorized appropriation levels and he will be unlikely to abandon consolidation. And if for some reason he were to abandon consolidation, it is likely that he would defer to the House in conference which has already passed a consolidation proposal. Other possibilities which have been floated, such as a commission to develop with a reorganization proposal or a mandate that the President present a plan to Congress that meets a specific budget number have their own problems.

Senator Helms hopes through this meeting to convince the Administration that he really has a good idea that the Administration should embrace. It is important to note that although he is sounding conciliatory in private, in public he is continuing to play a very tough game. Although he held a business meeting of the Committee today, he would not allow the bulk of nominees--largely those going to high profile countries--on the agenda and he would not consider the START II treaty.

Finally, we assume that Senator Dole has told Helms that the bill can only return to the floor if there is agreement and a limit on amendments. We understand that even if we can defeat a bill that we do not support the Republicans may well put consolidation and other foreign policy restrictions on appropriations bills, reconciliation or a continuing resolution. And, in very practical terms, the State Department must have a waiver from the authorizers to use its appropriations if there is no authorization bill. In an exchange of letters between Chairman Gilman and the Speaker on the House side, the Speaker

has confirmed that he will not agree to a waiver without Mr. Gilman's concurrence. This is meant to put pressure on us to complete an authorizing bill.

MAJOR PROBLEMS THAT REMAIN IN S. 908

1) **CONSOLIDATION OF THE FOREIGN AFFAIRS AGENCIES:** The bill would abolish AID, ACDA and USIA and merge their personnel and their functions in to the Department of State by no later than March 1, 1997. It would also mandate cuts in the number of State Department employees, so that the number authorized as of February 28, 1997 shall be 9% less than the number employed immediately prior to the date of enactment; the number employed as of September 30, 1997 would be 3% less than the February 28 number, and the number employed as of September 30, 1998 would be 2% less than the September 30, 1997 number. The other three agencies would be required to take even greater cuts prior to merger, with AID taking the heavier hit of a 50% reduction in employees.

The bill would also limit the number of Assistant Secretaries of State to the currently authorized number of 20, and would limit the number of Under Secretaries of State to the currently authorized number of five. No new slots would be provided to deal with the new functions to be taken on by the consolidation. The five Under Secretary positions are explicitly mandated: Policy, Export, Trade, Economics, and Business; International Security; Public Diplomacy; and Management.

2. **THREATS TO THE PRESIDENT'S PREROGATIVES:** A number of provisions are contained in some form in both the House and Senate versions of the State authorization bill. These include:

- Making significant portions of U.S. contributions to the UN subject to Presidential certification;
- Prohibiting contributions to UNPROFOR pending Presidential certifications, including that UNPROFOR is effectively implementing and encouraging compliance with certain UN resolutions;
- Limiting the President's ability to respond to boat migration by compelling a change in our refugee policy that would grant refugee status to individuals fleeing coercive abortion policies (although we understand that the White House is reconsidering the Administration's opposition to this provision);
- Asserting the primacy of the Taiwan relations Act over the 1982 Joint Communiqué between the U.S. and the PRC on arms sales to Taiwan;

- Establishing a Special envoy for Tibet with rank of Ambassador, within the Department and mandating that the person coordinate U.S. Government policies regarding Tibet.

There are a number of other foreign policy provisions in the bill which the Administration opposes. However, as those mentioned above are included in both the House and Senate bills, they would be most difficult to eliminate or modify in conference.

3. **FUNDING:** The funding cuts in the Helms bill for State operation are workable, but the bill provides significant difficulties for contributions to the United Nations and the funding levels for the other foreign affairs agencies. In the out-years, and authorization levels are significantly below OMB guidance for all of the agencies and, as mentioned above, the mandated employment reduction levels are excessive.

- III. PARTICIPANTS
The President
Senator Helms
- IV. PRESS PLAN
None.
- V. SEQUENCE OF EVENTS
As Per Usual
- VI. REMARKS
None.

Suggested Talking Points
for Meeting with
Senator Jesse Helms

- Mr. Chairman, I appreciate your coming to discuss S.980, the Foreign Relations Revitalization Act. I know you are truly committed to trying to fashion a bill that we can all support.
- We appreciate that you have offered a dialogue to see if there are areas in which we can reach agreement.
- As you know, there are three broad areas in which there is disagreement - restrictions on my and any other President's ability to conduct foreign policy, funding levels and mandating how we should organize to conduct foreign policy.
- Let me begin with restrictions. Even though you have made many accommodations as the bill progressed there are still issues remaining including asserting the primacy of the Taiwan Relations Act, certifications for UNPROFOR funding, and establishment of a Special Envoy to Tibet to name just three.
- On funding, although you have tried to do what you can within the budget resolution, levels are well below our request and seriously undermine our ability to conduct foreign policy.
- Regarding consolation, as you know, we do not support the concept proposed in the legislation. We believe that's how we should organize and the prerogative of the executive branch. And, we believe we have made and will continue to make significant strides in streamlining our institutions to meet new challenges.
- We would like to have an authorizing bill and I am sure we can find common ground if you can agree to give the executive branch the traditional flexibility that the Constitution assigns to the President to conduct foreign policy.
- Senator, I also want to reiterate something I know you have agreed on with the Secretary of State. It is very important that when we disagree that we not let one disagreement spill over into other areas. As you know, there are many nominations to countries of enormous significant to the interests of our country that are languishing in the Senate. (FYI such as Bosnia, Cambodia, Indonesia, Zaire) There are also tax treaties and, of course, START II which are ready for consideration by the floor or by the Committee. I would hope that you will exercise your responsibility as Chairman to expeditiously consider nominations and treaties as well as other legislative business as you have in the past.

THE WHITE HOUSE
WASHINGTON

July 20, 1995

95 JUL 20 P 3 : 45

MEMORANDUM FOR WHITE HOUSE STAFF

FROM: TODD STERN 
PHIL CAPLAN 
SUBJECT: Briefing Book Deadlines

Too many briefing materials for the President's daily briefing book and trip books have been coming in late. This includes event memos, background material, talking points and speeches. We need to tighten up the process so that our office has an opportunity to ensure that materials are in good shape and can get the President his briefing books on time.

We propose the following new schedule for the daily book, to take effect July 24:

Daily briefing book

All materials should be submitted to our office by 4 pm the day before the event, with an outside deadline of 6 pm. This will allow us to assemble the book, have edits made where necessary, and send the book to the President at a reasonable hour. You should assume that, as a general matter, materials submitted to us after 6 pm will not be included in the briefing book forwarded to the Residence.

Trip books

Background materials such as economic, political or local issue briefings for the states to which the President is travelling, or substantive updates on issues especially relevant to the trip (immigration, crime, timber, whatever) should be submitted to our office by 6 pm two nights before the trip -- for example, by Tuesday evening for a trip leaving Thursday morning.

[Note that, in the relatively near future, we are going to begin integrating all background memos prepared for a given state into a single, unified briefing memo on the state, which should result in a more concise, user-friendly product.]

Materials for specific events -- i.e., the basic event memo and any talking points or background related to the event -- should be submitted to our office by 3 pm the day before the trip. (The only exception to this is if the event in question is still too much in flux to prepare a memo. In such cases, memos should be submitted as soon as possible once the event is buttoned down.)

Multiple Day Trips. *Background materials* that relate to the 2d or following days of a trip should still be submitted two nights before the President departs from the White House. Similarly, *event materials* for subsequent days should still be submitted by 3 pm the day before the President departs. For example, background materials for a Thursday-Friday trip would be due Tuesday evening, while event materials would be due by 3 pm Wednesday.

Once again, the purpose for these deadlines is to allow us time to review materials, suggest needed changes, and make sure the President's book is in good shape formally and substantively. When a flood of material -- background memos, event memos, Qs and As, talking points, speeches -- all arrives at 7 or 8 o'clock the night before a trip, we can't do this job right.

If you've got questions about anything, please call Todd or Phil.

THE WHITE HOUSE

WASHINGTON

95 JUL 20 P3:45

July 20, 1995

MEMORANDUM FOR SENIOR STAFF

FROM: TODD STERN^{TDS}
PHIL CAPLAN^{PC}

SUBJECT: Paper Flow

The flow of paper to the President has increased in the past few months and we need to cut it back.

Please look at materials you are sending in for the President with a critical eye and a focus on providing him not with everything he could conceivably want, but with the materials you think he truly needs. This focus should apply whether you are submitting a decision memo, information memo, a weekly report, a compilation of clips, or anything else. At the risk of stating the obvious, bear in mind that, while the President might in principle be interested in the unabridged edition of whatever you've got for him, there is too much paper coming from too many offices here to make so many unabridged submissions manageable. Please keep things as concise as possible.

If you or any of your staff have questions about what is appropriate or useful to send in, please call me or Phil Caplan.

Thanks.

STERN, TODD

WEST WING

July 20, 1995

MEMORANDUM FOR WHITE HOUSE STAFF

FROM: TODD STERN
PHIL CAPLAN

SUBJECT: Briefing Book Deadlines

Too many briefing materials for the President's daily briefing book and trip books have been coming in late. This includes event memos, background material, talking points and speeches. We need to tighten up the process so that our office has an opportunity to ensure that materials are in good shape and can get the President his briefing books on time.

We propose the following new schedule for the daily book, to take effect July 24:

Daily briefing book

All materials should be submitted to our office by 4 pm the day before the event, with an outside deadline of 6 pm. This will allow us to assemble the book, have edits made where necessary, and send the book to the President at a reasonable hour. You should assume that, as a general matter, materials submitted to us after 6 pm will not be included in the briefing book forwarded to the Residence.

Trip books

Background materials such as economic, political or local issue briefings for the states to which the President is travelling, or substantive updates on issues especially relevant to the trip (immigration, crime, timber, whatever) should be submitted to our office by 6 pm two nights before the trip -- for example, by Tuesday evening for a trip leaving Thursday morning.

[Note that, in the relatively near future, we are going to begin integrating all background memos prepared for a given state into a single, unified briefing memo on the state, which should result in a more concise, user-friendly product.]

Materials for specific events -- i.e., the basic event memo and any talking points or background related to the event -- should be submitted to our office by 3 pm the day before the trip. (The only exception to this is if the event in question is still too much in flux to prepare a memo. In such cases, memos should be submitted as soon as possible once the event is buttoned down.)

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Once again, the purpose for these deadlines is to allow us time to review materials, suggest needed changes, and make sure the President's book is in good shape formally and substantively. When a flood of material -- background memos, event memos, Qs and As, talking points, speeches -- all arrives at 7 or 8 o'clock the night before a trip, we can't do this job right.

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Thanks.

THE WHITE HOUSE

WASHINGTON

July 20, 1995 95 JUL 20 P3:43

MEMORANDUM FOR WHITE HOUSE STAFF

FROM: TODD STERN⁷⁰⁰¹
PHIL CAPLAN^{PC}

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If you've got questions about anything, please call Todd or Phil.

T ✓ Some small edits

July 13, 1995

MEMORANDUM FOR EVELYN LIEBERMAN
GENE SPERLING
JEREMY BEN-AMI
KAREN HANCOX
FRED DOHSE, NSC
BRIAN JOHNSON, CEQ
ALLISON WILKIE
JULIE MASON

FROM: TODD STERN
PHIL CAPLAN

SUBJECT: Briefing material for press interviews

Thank you for coming to Wednesday's meeting. To summarize the conclusions reached:

- Qs and As and other briefing material for press interviews should continue to be submitted to the Press Office, which will in turn get it to our office. Where there is adequate notice, material should be submitted to the Press Office two nights before the event, so that Press can do whatever editing is needed and get a finished product to our office between 4pm and 6pm the night before the event.
- ✓ • The policy councils will be responsible for preparing Qs and As and other briefing information. The Press Office and Cabinet Affairs will no longer solicit material directly from the agencies. If the councils need additional materials, they will contact the agencies, but will still be responsible for editing down the material they get. *as requested by the Press Office.*
- Persons preparing Qs and As should focus only on issues which have some reasonable likelihood of getting asked. When we are over-inclusive, we end up giving the President more material than anyone could digest.
- The suggested answer to each question should be kept short - no longer than an answer you think the President should actually give. It isn't useful to suggest answers that go on for a page or longer; we have to be selective. Additional information that might be helpful to the President should be clearly labelled as "Background" and can follow two or three lines below the answer.

- For each major topic area (e.g. budget/economics, foreign, environment, domestic, political), the responsible office should include, where appropriate, the positive message you think the President should communicate in his answers.

Please let us know if you have any questions.

cc: Leon Panetta
Erskine Bowles
Harold Ickes
Mike McCurry
Lorrie McHugh
Laura Tyson
Tom O'Donnell
David Lane
Carol Rasco
Tony Lake
Andy Sens
Bob Boorstin
Doug Sosnik
Kitty Higgins
Steve Silverman
Katie McGinty
Shelly Fiedler

*I don't understand this...
should be
"positive message"
be in the
answer, as
a summary...*

DRAFT

June 27, 1995

MEMORANDUM FOR WHITE HOUSE STAFF

FROM: TODD STERN
PHIL CAPLAN

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We propose the following new schedule for the daily book, to take effect July 6:

Daily briefing book -- All materials should be submitted to our office by 4 pm the day before the event, with an outside deadline of 6 pm. This will allow us to assemble the book, have edits made where necessary, and send the book to the President at a reasonable hour. You should assume that, as a general matter, materials submitted to us after 6 pm will not be included in the briefing book forwarded to the Residence.

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If you've got questions about anything, please call our office.

add to Phil or Phil or Shannon ~~Wagner~~ ~~Wagner~~ in the office.

example

reference
Arkansas
St
portland
trip

review

June 15, 1995

MEMORANDUM FOR LEON PANETTA

FROM: TODD STERN

SUBJECT: Long Range Plan

First, please excuse the tardiness of this memo. It results mostly from the short-range reality that I've been buried trying to (a) keep a lot of paper moving, and (b) hire staff (Phil Caplan as the new deputy and Carol Cleveland to replace Fran, with a new third person yet to be hired). That said, let me turn to the principal issues.

Paper Flow

The flow of paper to the President, especially information items, has been increasing substantially in recent months. We have already implemented certain measures to consolidate paper, but we need to do more -- the President is getting overloaded and has expressed his frustration on several occasions.

I plan to do a general memo to senior staff to urge, once again, that everyone try to limit what they send him. In addition, I plan to meet separately with particular offices, such as Political and Cabinet Affairs, to talk about ways to consolidate and limit the flow.

Press Conferences/Interviews

On many occasions, the material we provide the President for press conferences or significant interviews is excessive. For the "Larry King Live" interview, 84 pages of domestic briefing material was submitted to us.

The typical process is that White House staff collects material from agencies and forwards it to us (via the Press Office). It would be more effective if White House staff received material from agencies at least 24 hours in advance (unless it's a last minute event) and then boiled it down so the President got what he needs -- for example, a half to one page of concise Qs and As on a subject rather than four or five pages. I plan to convene a meeting with key people from the Press Office and policy shops to go over this; I have already discussed it with Press.

Briefing Books

We need to tighten this process up. Papers are coming in too late -- often after 8 pm -- which means both that the book gets to the President later than it should and that our Office has little opportunity to have papers fixed that need fixing. Our aim is to have relevant staff submit briefing materials to our Office by 4 pm the day before the event if possible and by 6 pm at the latest.

Trip Books

John and I talked to Erskine a while ago about making some changes to the President's trip books.

Overview. First, we proposed adding to the trip book a brief overview memo laying out the rationale for the trip -- why the President is going, what we hope to accomplish, what the message is. In essence, a domestic analogue to the "Scope" memos he gets for major NSC events. Our office would prepare this memo.

Background Section. Our office should oversee preparation of a single, unified briefing memo for whatever states the President is travelling to, combining what are now separate memos on political affairs, economic issues and local issues. The initial work on this briefing would still be done by NEC, Political, and Research, with assistance from Cabinet Affairs if necessary. We would continue to provide separately the one-pager the President now gets from NEC on a given state's economic progress during the Clinton Administration.

Additional sections of the memo (or, in certain cases, separate memos) pertinent to specific events or states would be included on an as needed basis -- for example, on immigration, timber, etc.

Travelling

In recent months, because we've been understaffed, we haven't filled our traditional role of travelling on overnight trips. All Staff Secretaries in recent memory have gone on such trips (i) to handle paper coming in from the White House, (ii) to make sure the following day's briefing book is complete and distributed to relevant senior staff, and (iii) to handle paper coming back from the President so that copies get made for relevant staff and the paper gets properly archived. I think it makes sense for our office to resume the practice of travelling on overnight trips where possible.

Feedback

It would be helpful for me to get a couple minutes with the President at some point -- perhaps after John leaves and I officially assume my new duties -- to get a little feedback. For

example, it would be useful to know if the President has any views about (i) the volume of paper he is getting generally and the amount he is getting from particular offices, like Political and Cabinet Affairs; (ii) his daily briefing book and trip books; (iii) the nature and amount of materials prepared for large events such as economic conferences and town meetings and (iv) the way we are now packaging and summarizing information memos.

Last Thought

I have a last thought which I am not actively pressing, but offer up in case you and the President think it might be helpful. One way to clear through a lot of paper without sending it all to the President (even in summarized form) would be for me to spend a few minutes with him every week (perhaps along with Nancy Hernreich) going through various memos, letters, reports, etc. I could tell him orally, and very briefly, what each one is about, providing him only with the ones he wants to see. The upside would be that he wouldn't have to look at quite so many nagging folders in his inbox. The downside is that you'd need to build another 15 minutes or so into the weekly schedule -- although, in theory, the President would save more time by not having to read as much. Of course, the President might not care to do this in any event. But if you and he think it would be useful, we could try it out.

cc: Erskine Bowles
Harold Ickes

LONG RANGE PLAN - STAFF SECRETARY

TASK

CONTACT

DUE DATE

Reduce paper flow to the President.		
- Send general memo to senior staff to urge them to limit paper flow to POTUS.	Stern	SEE ? DRAFT ATTACHED
- Meet with offices, in particular Political and Cabinet Affairs, to discuss ways to limit flow.	Stern	July? 7
Streamline information flow related to press conferences and interviews.		
- Meet with Press Office and policy shops to streamline this process.	Stern	July? 7
memo to preparing daily		
Tighten up the process for creating briefing books and trip books.		
- Meet with relevant staff to develop a process that provides adequate lead time for review. establish deadlines	Stern	SEE ? DRAFT ATTACHED
Revise/improve trip books.		
- Add to trip books a brief overview memo which states the rationale for the trip.	Stern	July 24*
- Begin preparing a briefing memo which summarizes political, economic, and local issues.	Stern	July 24
- Include sections pertaining to specific events, states, or industries when appropriate.	Stern	?
Resume overnight travel.		
- Begin sending representative from Staff Secretary to travel on all overnight trips.	Stern	? DONE
Get feedback from POTUS.		
- Meet briefly with POTUS to get feedback on the role and performance of Staff Secretary.	Stern	July 14
- Explore possibility of weekly meeting with POTUS to discuss issues and receive feedback.	Stern	? discussed V/COs and DCOS

paper flow and briefing materials.

* will start this once our third skt is filled.

THE WHITE HOUSE
WASHINGTON

10/20

Leon -

You asked for
a draft memo
on this subject.

Teddy

THE WHITE HOUSE

WASHINGTON

October 23, 1995

MEMORANDUM FOR SENIOR STAFF

FROM: LEON PANETTA

SUBJECT: Reminder on Paper Flow

This is a reminder that all paper intended for the President, whether for his information or for action, is to be routed through the Staff Secretary's office. There are two important reasons for this system.

First, with respect to action items (decision memos, correspondence, executive orders, speeches, etc.) it protects both the President and the senior staff by allowing the Staff Secretary to circulate items to relevant staff for comment before they go to the President. The President is thus assured both of receiving items that have been properly vetted and of being informed about relevant staff views; and senior staff with an interest in a particular item are given an opportunity to convey their views before the matter goes to the President. Passing action items directly to the President doesn't serve him.

Second, unless all paper (including information items, articles, etc.) is routed through the Staff Secretary, he cannot effectively do the job of regulating the flow of paper to the President in a manageable way that gives priority to time sensitive items and keeps the President from getting overloaded.

Please make sure that you and everyone in your departments follow this procedure.

E X E C U T I V E O F F I C E O F T H E P R E S I D E N T

06-Oct-1995 02:19pm

TO: Erskine Bowles

FROM: Todd Stern
 Office of the Staff Secretary

CC: Pamela B. Madaris

SUBJECT: travel

Erskine -- we are about to start revving up toward more travel, so now is probably a good time to review general travel policy as it relates to my office. It seems to me that it would be quite worthwhile to return to the practice of the first 20 months or so -- namely, where possible, having someone from my office travel on multiple-day trips. Otherwise, people like Stephen have to worry about getting paper to the President (and sometimes to other senior staff with him), which isn't their job.

Also, when no one on the road is actively worried about keeping track of what has gone to the President, what is pending with him, what he has acted on, etc., we end up with real uncertainty about whether given matters have been acted on, whether relevant staff people back at the White House have been informed of his decision, etc. There have been a number of occasions where confusion has reigned after a trip as to whether the President did or did not act on some given matter.

In addition, we should be the point people on the road making sure that the briefing book is in proper shape, that if there is anything else the President needs, we talk to the necessary people back here to get such materials prepared, etc.

As you know, it is certainly not the case that a person from our office will be busy all the time during a trip. There is always a fair amount of dead time. But I think having someone from this shop along can make things work more smoothly. And I imagine this will be even more true as travel gets more intense and hectic in 1996.

Let me know if you'd like to discuss this or any other aspect of trip preparation and staffing.

Incidentally, I have put in a request for a brief (5 minute) meeting with the President -- I have never gotten together with him since moving up to the Staff Secretary slot in late June and I wanted both (i) to thank him for the promotion and (ii) to check

on whether he is satisfied or would like changes made in the way we're handling his paper, briefing materials, etc.

Todd

Thanks

Todd.

Helena

—

July 20, 1995

MEMORANDUM FOR WHITE HOUSE STAFF

FROM: TODD STERN
PHIL CAPLAN

SUBJECT: Briefing Book Deadlines

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THE WHITE HOUSE

WASHINGTON

July 21, 1995

MEMORANDUM FOR EVELYN LIEBERMAN

GENE SPERLING
JEREMY BEN-AMI
KAREN HANCOX
FRED DOHSE, NSC
BRIAN JOHNSON, CEQ
ALLISON WILKIE

FROM:

TODD STERN *TS*
PHIL CAPLAN *PC*

SUBJECT:

Briefing material for press interviews

Thank you for coming to the recent meeting in our office. To summarize the conclusions reached:

- Qs and As and other briefing material for press interviews should continue to be submitted to the Press Office, which will in turn get it to our office. Where there is adequate notice, material should be submitted to the Press Office two nights before the event, so that Press can do whatever editing is needed and get a finished product to our office between 4pm and 6pm the night before the event.
- The policy councils will be responsible for preparing Q's and A's and other briefing information. The Press Office and Cabinet Affairs will no longer solicit material directly from the agencies. If the councils need additional materials, they will contact the agencies, but will still be responsible for editing down the material they get.
- Persons preparing Qs and As should focus only on issues which have some reasonable likelihood of getting asked. When we are over-inclusive, we end up giving the President more material than anyone could digest.
- The suggested answer to each question should be kept short -
- no longer than an answer you think the President should actually give. It isn't useful to suggest answers that go on for a page or longer; we have to be selective. Additional information that might be helpful to the President should be clearly labelled as "Background" and can follow two or three lines below the answer.

- Where appropriate, responsible offices (e.g. NEC, NSC, environment, DPC, Political), are encouraged to submit, on a separate page, a brief synopsis of the positive message you think the President should communicate in his answers.

Please let us know if you have any questions.

cc: Leon Panetta
Erskine Bowles
Harold Ickes
Mike McCurry
Lorrie McHugh
Julie Mason
Laura Tyson
Tom O'Donnell
David Lane
Carol Rasco
Tony Lake
Andy Sens
Doug Sosnik
Kitty Higgins
Steve Silverman
Katie McGinty
Shelly Fidler

THE WHITE HOUSE
WASHINGTON

95 JUN 22 P2 : 27

MEMORANDUM

TO: Todd Stern
FROM: Erskine Bowles
SUBJECT: Comments on Long Range Plan
DATE: June 21, 1995

I am attaching a reformat of your long range plan, to which you have agreed to be held accountable.

Todd, in my experience if a goal does not have a particular person held responsible for accomplishing it, or a date when that goal is to be accomplished, it rarely gets done. In this regard, I would make two comments on your report:

1. I would imagine that Todd Stern is not going to be the person who is being held accountable for accomplishing each one of these tasks, but that you have someone there assigned to it. We would like to know who that person is (perhaps the contact is Stern/someone else).
2. On goals like "send general memo to senior staff to urge them to limit paper flow to POTUS", I think it would make sense for us to know when you expect that might be accomplished.

Thank you so much for your work in this regard. We look forward to meeting with you on a regular basis to review the progress you and your team are making in accomplishing each one of these specific goals. If you have any questions, please let me know.

LONG RANGE PLAN - STAFF SECRETARY

TASK	CONTACT	DUE DATE
(m) Reduce paper flow to the President.		
- Send general memo to senior staff to urge them to limit paper flow to POTUS.	Stern	?
- Meet with offices, in particular Political and Cabinet Affairs, to discuss ways to limit flow.	Stern	?
Abby Streamline information flow related to press conferences and interviews.		
- Meet with Press Office and policy shops to streamline this process.	Stern	?
(m) Tighten up the process for creating briefing books.		
- Meet with relevant staff to develop a process that provides adequate lead time.	Stern	?
need 3rd revision Revise/improve trip books.		
- Add to trip books a brief overview memo which states the rationale for the trip.	Stern	?
- Begin preparing a briefing memo which summarizes political, economic, and local issues.	Stern	?
- Include sections pertaining to specific events, states, or industries when appropriate.	Stern	?
Done Resume overnight travel.		
- Begin sending representative from Staff Secretary to travel on all overnight trips.	Stern	?
To be done Get feedback from POTUS.		
- Meet briefly with POTUS to get feedback on the role and performance of Staff Secretary.	Stern	July
- Explore possibility of weekly meeting with POTUS to discuss issues and receive feedback.	Stern	?

THE WHITE HOUSE
WASHINGTON

95 JUN 22 P2 : 27

MEMORANDUM

TO: Todd Stern

FROM: Erskine Bowles

SUBJECT: Comments on Long Range Plan

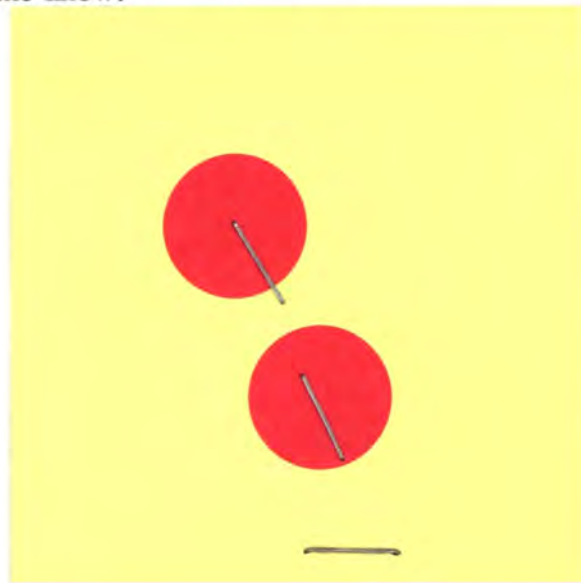
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LONG RANGE PLAN - STAFF SECRETARY

TASK	CONTACT	DUE DATE
Reduce paper flow to the President.		
- Send general memo to senior staff to urge them to limit paper flow to POTUS.	Stern	?
- Meet with offices, in particular Political and Cabinet Affairs, to discuss ways to limit flow.	Stern	?
Streamline information flow related to press conferences and interviews.		
- Meet with Press Office and policy shops to streamline this process.	Stern	?
Tighten up the process for creating briefing books.		
- Meet with relevant staff to develop a process that provides adequate lead time.	Stern	?
Revise/improve trip books.		
- Add to trip books a brief overview memo which states the rationale for the trip.	Stern	?
- Begin preparing a briefing memo which summarizes political, economic, and local issues.	Stern	?
- Include sections pertaining to specific events, states, or industries when appropriate.	Stern	?
Resume overnight travel.		
- Begin sending representative from Staff Secretary to travel on all overnight trips.	Stern	?
Get feedback from POTUS.		
- Meet briefly with POTUS to get feedback on the role and performance of Staff Secretary.	Stern	July
- Explore possibility of weekly meeting with POTUS to discuss issues and receive feedback.	Stern	?

THE WHITE HOUSE
WASHINGTON

95 JUN 2 P3:54

June 2, 1995

MEMORANDUM FOR ASSISTANTS TO THE PRESIDENT

FROM: Erskine Bowles 
Deputy Chief of Staff

SUBJECT: Long Range Plan

This is a reminder that your long term goals and objectives are due in Leon's office on Monday, June 5, 1995.

- ① consol. reporting - clean up
some of junk
- ② TRIP book plan } scheduling
daily book
- ③ Travel

THE WHITE HOUSE
WASHINGTON

May 25, 1995

MEMORANDUM FOR ASSISTANTS TO THE PRESIDENT

FROM: Leon E. Panetta
Chief of Staff

SUBJECT: Long Range Plan

As I indicated at a recent staff meeting, I would like each Assistant to report on the long-term goals and objectives of his or her office on a regular basis. The report should focus on a six month outlook, concentrating on the efforts you are making to accomplish long-term goals and objectives.

To better prepare for these presentations, I would like each of you to submit to my office an outline of your department's goals and objectives for the next six months by Monday, June 5. This outline should be no more than three pages in length and a copy should be sent to both Harold and Erskine. Each goal and objective you list should include both who is responsible for its accomplishment and when you expect it to be accomplished.

Harold, Erskine and I will review your long range plans, will discuss them with you, and will reach a consensus plan by Wednesday, June 21, 1995. These will be presented to the President. Thereafter, we will discuss on a regular basis how each of you are progressing in accomplishing the goals you have set for the next six months.

Timeline

<u>Assignment</u>	<u>Date Due</u>
1) Assistants to President send outline of their department's goals and objectives to COS.	Monday, June 5, 1995
2) COS Office reviews and negotiates goals with Assistants to President.	June 5-21, 1995
3) COS approves goals and objectives of each Assistant to President.	June 21, 1995
4) Each Assistant to President reports to COS on progress in accomplishing goals.	On a regular basis

THE WHITE HOUSE
WASHINGTON

95 MAY 22 P6:17

May 19, 1995

MEMORANDUM FOR ASSISTANTS TO THE PRESIDENT

FROM: Leon E. Panetta
Chief of Staff

SUBJECT: Long Range Plan

As I indicated at a recent staff meeting, I would like each Assistant to report on the long-term goals and objectives of his or her office on a regular basis. The report should focus on a six month outlook, concentrating on the efforts you are making to accomplish long-term goals and objectives.

To better prepare for these presentations, I would like each of you to submit to my office an outline of your department's goals and objectives for the next six months by Monday, June 5. This outline should be no more than three pages in length and a copy should be sent to both Harold and Erskine. Each goal and objective you list should include both who is responsible for its accomplishment and when you expect it to be accomplished.

Harold, Erskine and I will review your long range plans, will discuss them with you, and will reach a consensus plan by Wednesday, June 20, 1995. These will be presented to the President. Thereafter, we will discuss on a regular basis how each of you are progressing in accomplishing the goals you have set for the next six months.

Timeline

<u>Assignment</u>	<u>Date Due</u>
1) Assistants to President send outline of their department's goals and objectives to COS.	Monday, June 5, 1995
2) COS Office reviews and negotiates goals with Assistants to President.	June 5-20, 1995
3) COS approves goals and objectives of each Assistant to President.	June 20, 1995
4) Each Assistant to President reports to COS on progress in accomplishing goals.	On a regular basis

January 19, 1995

MEMORANDUM FOR THE PRESIDENT

CC: ERSKINE BOWLES

FROM: JOHN PODESTA
TODD STERN

SUBJECT: Your Briefing Book

This memo is intended to provide some suggestions to shorten and streamline both your daily briefing book and the briefing books prepared for trips.

Daily Briefing Book

Your note to Erskine indicates that you find the daily briefing book too bulky. We propose the following new format: we will give you (i) the schedule, (ii) a cover note from us highlighting the key events on your schedule, and (iii) those substantive memos/materials that we think merit your advance review. Non-substantive event memos would still go to Nancy Hernreich and Stephen Goodin, since they are useful for setting up events, but not to you.

NSC Talking Points. When NSC prepares talking points for events like press interviews or congressional meetings, they are typically quite long and detailed. For example the January 5 talking points for your meeting with the bi-partisan congressional leadership were 16 pages long.

We suggest that NSC prepare a short, 1-3 page overview highlighting the key points for you to make either on your own initiative or in response to the most likely questions you might be asked. The long, issue by issue points you now receive would be included only for press conferences or major press interviews.

Trip Books

Overview. While most of this memo is aimed at eliminating or consolidating paper, we propose one addition to your trip book: a brief overview memo at the beginning of the book laying out the rationale for the trip -- why you're going, what we hope to accomplish, what the message is. In essence, a domestic analogue to the "Scope" memos you get for major NSC events. Our office would prepare this memo.

Event Section. We propose eliminating non-substantive event memos from your book (receptions, meet and greets, photo-ops, etc.). As in the case of the daily briefing book, we would give you the schedule plus any substantive event memos that we thought you'd want to see. Stephen would carry a complete set of the event memos in case you wanted to look at any of the ones we omitted from your book.

Background Section. Our office will oversee preparation of a single, unified briefing memo for the state you are travelling to, combining what are now separate memos on political affairs, economic issues, cabinet affairs and local issues. The initial work on this briefing would still be done by NEC, Political, Cabinet Affairs and Research. We would continue to provide separately the one-pager you now get from NEC on the state's economic progress during the Clinton Administration.

Additional sections of the memo (or, in certain cases, separate memos) pertinent to specific events or states would be included on an as needed basis -- for example, on crime, immigration, health care or job training.

January 17, 1995

MEMORANDUM FOR THE PRESIDENT

CC: ERSKINE BOWLES

FROM: JOHN PODESTA
TODD STERN

SUBJECT: Your Briefing Book

This memo is intended to provide some suggestions to shorten and streamline both your daily briefing book and the briefing books prepared for trips.

Daily Briefing Book

Your note to Erskine indicates that you find the daily briefing book too bulky. We would propose the following new format: we will give you only (i) the schedule, (ii) those briefing memos/materials that we think merit your advance review, and (iii) a cover memo from us highlighting the key events on your schedule and the attached memos we have selected for your review. The standard, non-substantive memos prepared for each event are useful for setting up the event and therefore will continue to go to Nancy Hernreich and Stephen Goodin, but not to you. Of course, we will continue to give you drafts of any remarks for the next day.

NSC Talking Points. When NSC prepares talking points for events like press interviews or congressional meetings, they are typically quite long and detailed. For example the January 5 talking points for your meeting with the bi-partisan congressional leadership were 16 pages long.

If you find this format useful, there is no need to change it. However, we would suggest, assuming Tony has no objection, that a short, 1-3 page overview be prepared highlighting the key points for you to make either in an affirmative manner or in response to those questions that seem most likely to be asked in the interview or meeting. The issue by issue points you now receive would be reserved primarily for press conferences and more extended press interviews.

Trip Books

Overview. While most of this memo is aimed at eliminating or consolidating paper, we would propose one addition to your trip book: an overview memo at the beginning of the book that lays out the rationale for the trip -- why you're going, what we

hope to accomplish, what the message is. In essence, a domestic analogue to the "Scope" memos you get for major NSC events. [This memo should be prepared by...][JOHN -- OUR OFFICE COULD DO THIS, BUT ONLY IF WE HAD SOMEONE WHO WAS THE TRIPBOOK EDITOR-IN-CHIEF (DOING THIS AND THE BACKGROUND SECTION) AND WAS INCLUDED IN ALL THE STRATEGIC MEETINGS AT WHICH GIVEN TRIPS OR EVENTS WERE DECIDED UPON.]

Event Section. We propose eliminating non-substantive event memos from your book (receptions, meet and greets, photo-ops, etc.). As in the case of the daily briefing book, we would give you the schedule plus any substantive event memos that we thought you'd want to see. Stephen would carry a complete set of the event memos in case you wanted to look at any of the ones we didn't give you.

Background Section. We have two alternatives to suggest.

Alternative 1. A single, unified briefing memo would be prepared for a given state, combining what are now separate memos on political affairs, economic issues and statistics, cabinet issues and local issues. The pieces of this briefing would still be prepared by the separate departments (Political, NEC, Cabinet, Research), as they are now, but our office would combine and edit the pieces into a single, coherent memo. Sections pertinent to specific events or states could be added on an as needed basis; for example, on crime, immigration, health care or job training.

The catch here is that we would need to have the third substantive slot in the Staff Secretary's office to take on this much more time-consuming role in the briefing process.

Alternative 2. This alternative would retain the current set of memos, but strive to make them more concise. The basic background section would include:

-- **Political briefing** -- 2-3 page memo focussing on politics, not issues.

-- **Economic briefing** -- 2-3 page memo discussing (i) economic progress in the State during the Clinton Administration; (ii) basic statistics; (iii) key economic issues.

-- **Cabinet briefing** -- 2-3 page memo covering key information on the state from the Cabinet agencies.

-- **Local Issues** -- short memo covering only those important local issues that the President may need to know about and that are not covered in economic or Cabinet briefing.

As a slight variation, where Cabinet and/or Local Issues memos contain nothing of major significance, they could be

deleted from the President's book, but given to Stephen Goodin in the event the President wanted to see them.

On an as needed basis, we would include memos pertinent to given states or events (e.g., crime, immigration, etc.).

organize the actual event and therefore, will continue to go to [DRAFT]

January 10, 1995

MEMORANDUM FOR THE PRESIDENT

CC: ERSKINE BOWLES

FROM: JOHN PODESTA
TODD STERN

SUBJECT: Your Briefing Book

This memo is intended to provide some suggestions to shorten and streamline both your daily briefing book and the briefing books prepared for trips.

Daily Briefing Book

Your note to Erskine indicates that you find the daily briefing book too bulky. We would propose the following new format: **we will give you only (i) the schedule, (ii) those briefing memos/materials that we think merit your advance review, and (iii) a cover memo from us highlighting the key events on your schedule and the attached memos we have selected for your review.** The standard, non-substantive memos prepared for each event will go to Stephen Goodin, but not to you. Of course, we will continue to give you drafts of any remarks for the next day.

NSC Talking Points. When NSC prepares talking points for events like press interviews or congressional meetings, they are typically quite long and detailed. For example the January 5 talking points for your meeting with the bi-partisan congressional leadership were 16 pages long.

If you find this format useful, there is no need to change it. However, we would suggest, assuming Tony has no objection, that a short, 1-2 page overview be prepared ~~as a cover~~, highlighting the key points for you to make either in an affirmative manner or in response to those questions that seem most likely to be asked in the interview or meeting. The issue by issue points you now receive would follow the overview.

Trip Books

Event Section. We propose eliminating non-substantive event memos from your book (receptions, meet and greets, photo-ops, etc.). As in the case of the daily briefing book, we would give you the schedule plus any substantive event memos that we thought you'd want to see. Stephen would carry a complete set of the event memos in case you wanted to look at any of the ones we didn't give you.

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primarily
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Nancy
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and

Background Section. We propose the following basic background section:

-- **Political briefing** -- 2-3 page memo focussing on politics, not issues.

✓ -- **Economic briefing** -- 2-3 page memo discussing (i) economic progress in the State during the Clinton Administration; (ii) basic statistics; (iii) key economic issues.

Ⓜ -- **Cabinet briefing** -- 2-3 page memo covering key information on the state from the Cabinet agencies.

Ⓜ -- **Local Issues** -- short memo covering only those important local issues that the President may need to know about and that are not covered in economic or Cabinet briefing.

On an as needed basis, we would include memos pertinent to given states or events, such as memos on crime, health care, immigration, job training, etc.

see re

JPH

Ⓜ CEA

