

THE WHITE HOUSE

WASHINGTON

December 2, 1998

MEMORANDUM FOR JOHN PODESTA and MARIA ECHAVESTE

FROM: PHILLIP CAPLAN *PC*

SUBJECT: Staff Secretary's Office - Objectives Update

Todd submitted to Erskine a "mission" memo on November 24, 1996, and a "goals and objectives" memo on March 1, 1997. This memo serves as an update.

I. Mission

The basic mission of our office remains the same: to manage the paper flow to and from the President. This includes: (i) making sure he gets what he needs on time, but not overloading him; (ii) making sure such paper is sound in substance and form; (iii) executing items that require his signature but not his time; (iv) gathering senior staff views on various matters before presenting those matters to him; (v) summarizing material -- both informational and decisional -- clearly and concisely while sharpening issues for decision; (vi) routing paper back from the President to appropriate staff. Implicit in these aspects of our mission is our function as the White House "goalie" -- we review all Presidential press statements, EOs, directives, signing statements, etc. before they're made public and view ourselves as the office that tries to prevent mistakes that may have otherwise gone unnoticed.

II. Goals and Objectives

Todd laid out four primary goals. I believe we have clearly met two of the goals, periodically meet another, and did not meet the fourth because it was not pursued. In developing a revised list of goals, I'd add three.

Previous Goals

1. GOAL: Maintain a well-modulated flow of paper to the President: **GOAL BEING MET.**
2. GOAL: Maintain high quality of materials prepared for the President: **GOAL BEING MET.**
3. GOAL: Improve quality and timeliness of daily briefing books: **GOAL MET PERIODICALLY.**

This has been a longstanding problem. We too often get briefing material late and the President ends up getting his book after 9:30 pm. The quality of the material

has remained fairly good, but the timeliness is often embarrassing. We nag staff frequently about this problem and periodically get results, but the performance is spotty. Periodically it gets so bad that I'll raise it at the senior staff meeting. It'll then get better and in a few days drop off again.

We assume the President needs his book in a timely fashion and that it's important to his daily job performance. The degree to which he relies on it each night (or not) is almost immaterial -- he should have it, it serves as an organizing tool for the daily schedule and a number of staff rely heavily on it. Perhaps there is a relationship between the quality/timeliness of the book and the President's reliance on it. It might be useful to spend 10 minutes with him at some point to get his feedback on the book. To my knowledge, we've really never received feedback in six years.

I'm convinced the only way to really fix the problem is to keep a daily or weekly log with the exact time material was submitted to this office so that the bad actors can be singled out. Then, we would need to figure out some forum to identify the culprits. I certainly could raise it at the staff meeting, or you could, or we could figure out some other forum. At the very least, staff should be aware that such a list exists and is received by the Chief of Staff. Unfortunately, I don't think this office's complaining is sufficient. (Speeches are another story that should be addressed separately.)

4. GOAL: Improve quality of trip briefing books through preparation of an overview memo for each trip: **GOAL NOT MET (NOT PURSUED).**

Based on our experience of attempting to produce such a memo in 1996 for several trips, Todd rightly emphasized that to undertake this project would require additional resources.

Additional Goals

5. GOAL: Prepare for transition to Clinton Library.

The Office of Records Management (ORM), which reports to me, will soon have to begin preparing current WH staff for transferring records in their offices to the Library. (Records in storage will be shipped to Little Rock). This is a manageable process but somewhat tedious. ORM will be able to handle this task with assistance from Archives and DoD employees, which I understand is standard practice. But, it will take a fair amount of staff education on how to identify and box up records. Beginning mid-next year, we and ORM should send out the first in a series of memos to WH staff on how to accomplish this.

Also, I think it makes sense at some point to begin working with Nancy, Bruce or Skip on Library issues. I understand that Library business is closely held at this point and in no

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6. GOAL: Address internal management issues.

Since taking over this office officially, I've tried to improve it in two areas: (A) staff morale/outreach and (B) customer service.

A. Staff - I've made a conscious effort to spend more time in the OEOP with the various divisions under this office. Most prominently, I've held a series of brown bag lunches with each division (*e.g.* Student Correspondence, Mail Analysis) and spent time just popping into random offices to say hello. Also, I've tried to be more timely with personnel decisions. I think both of these efforts have made a difference.

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Correspondence and Records Management have been engaged in a long-term effort with Ginny's shop and various consultants to install a new tracking/scanning/retrieval system based on bar codes, etc. I've been keeping tabs on it and it sounds like a pretty good but very ambitious plan, but the dates keep slipping and now it is not to be installed until September 1999 (delayed from March). We'll have to keep a close eye on it -- these are two very computer-dependent offices.

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Moreover, staff should be aware that such a list exists and is reviewed by the Chief of Staff's office

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Phil - is it too self-congratulatory to say "met"? Perhaps: "Goal generally met"

embarrassing. We nag staff frequently about this problem and periodically get results, but the performance is spotty. ~~Periodically it gets so bad that I'll raise it at the senior staff meeting, it'll then get better and in a few days drop off again.~~ *When necessary, I* *the issue*

great idea! In order to fix this problem, we first need to determine if the President cares. If he does (and I've always assumed he does), then I'm convinced the only way to really fix it is to present a log to you daily or weekly with the time material was submitted to this office so that *you* can single out the bad actors. Unfortunately, I don't think this office's complaining works anymore, and it will take a higher authority. (Speeches are another story that should be addressed separately.) *leading to a temporary though not sustained improvement*

4. ~~GOAL~~ *GOAL*: Improve quality of trip briefing books through preparation of an overview memo for each trip. **GOAL NOT MET (NOT PURSUED).**

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Additional Goals

5. ~~GOAL~~ *GOAL*: Prepare for transition to Clinton Library. *package*

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[update: Slavis promotion, my arrival?]

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.

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the senior staff meeting. It'll then get better and in a few days drop off again.

In order to fix this problem, we first need to determine if the President cares. If he does (and I've always assumed he does), then I'm convinced the only way to really fix it is present a log to you daily or weekly listing the time material was submitted to this office so that you can single out the bad actors. Unfortunately, I don't think this office's complaining works anymore, and it will take a higher authority. *speeches are another story.*

4. GOAL: Improve quality of trip briefing books through preparation of an overview memo for each trip = **GOAL NOT MET.**

Based on our experience of attempting to produce this memo in 1996 for several trips, Todd rightly emphasized that to undertake this project would require additional resources.

Additional Goals

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Also, I think it makes sense at some point to begin working with Nancy, Bruce or Skip on Library issues. I understand that Library business is closely held at this point and in no way am I trying to intrude on this, but I think we should be involved at the appropriate time.

6. GOAL - Improve internal issues.

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March 1, 1997

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FROM: TODD STERN

SUBJECT: Staff Secretary's Office -- Goals and Objectives

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GOAL: Maintain a well-modulated flow of paper to the President.

Objectives:

- Limit amount of paper going to President. Get him what he needs on timely basis, but not more than he needs.
- Give President adequate time to review decisional materials.
- Get decision items with adequate time to properly coordinate senior staff comment.
- Summarize decision and selected information items to save President's time.
- Assure quality of materials going to President.
- Ensure that materials for the President go through our office so that we are able to regulate the flow to his office; make sure that relevant senior staff have an opportunity to comment; and make a final judgment on whether a given item should go to the President at all.

GOAL: Maintain high quality of materials prepared for President.

Objectives:

- Ensure that memos and other materials for the President are first-class -- clear, concise, and sound in terms of both form and substance.

GOAL: Improve quality and timeliness of daily briefing books. Late submission of materials for the briefing book has been a chronic problem since 1993. The result is that the President routinely receives his briefing book late.

Objectives:

- Receive final briefing papers by our 6 pm deadline so that they can be edited or revised, if necessary, and briefing book can be delivered to the Residence by 8 pm every night.
- Receive speeches by the same deadline or earlier so that (a) they can get proper final review and vetting before submission to the President, and (b) the President has an adequate opportunity to review and work on a speech before giving it.

GOAL: Improve quality of trip briefing books.

Objectives:

- Preparation of an overview memo outlining the purpose of a trip and its major events. The President should be informed up front what the purpose and major objectives are for a trip and for each of the major events along the way. This should be a concise, strategic memo.
- Consolidation of the numerous individual background memos the President now receives for trips. It would be more useful and user-friendly for the President to receive a unified memo for any given state he is visiting. This memo would present a political and economic overview and include the salient issues he needs to know -- including relevant Clinton Administration accomplishments, local color, etc. -- for his visit. While such a memo would be an improvement over what he now receives, it would require some additional resources to produce. Thus, before going down this track, we need to discuss further with Chief of Staff's office.

THE WHITE HOUSE

WASHINGTON

'98 NOV 24 PM1:39

November 20, 1998

MEMORANDUM TO ASSISTANTS TO THE PRESIDENT

FROM: JOHN PODESTA^{JP} AND MARIA ECHAVESTE^{ME}

SUBJECT: MISSION STATEMENTS

Earlier this month, we asked members of the Cabinet to prepare summaries of what they would like to accomplish in their agencies during the next two years. At the beginning of the President's second term, we asked you to prepare similar mission statements outlining the goals and objectives for your departments.

While we do not want to reinvent the wheel, we would like you to review your office's previous work and prepare a short summary of what you would like to accomplish in your departments -- what your revised goals and objectives are -- over the next two years. We know you have been working hard and have accomplished a great deal for this President. We would like this exercise to build upon that work and challenge you to stretch your vision, again. This information will be very helpful to us and we would like to share your thoughts with the President. Please provide your submissions to us by the close of business on Wednesday, December 2.

Kevin S. Moran 11/23/98 01:22:00 PM

Record Type: Record

To: See the distribution list at the bottom of this message

cc:

Subject: CoS Mission Statements Request

November 23, 1998

MEMORANDUM TO ASSISTANTS TO THE PRESIDENT

FROM: JOHN PODESTA AND MARIA ECHAVESTE

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While we do not want to reinvent the wheel, we would like you to review your offices' previous work and prepare a short summary of what you would like to accomplish in your departments -- what your revised goals and objectives are -- over the next two years. We know you have been working hard and have accomplished a great deal for this President. We would like this exercise to build upon that work and challenge you to stretch your vision, again. This information will be very helpful to us and we would like to share your thoughts with the President. Please provide your submissions to us by the close of business on Wednesday, December 2.

Message Sent To: _____

December 2, 1998

MEMORANDUM FOR JOHN PODESTA and MARIA ECHAVESTE

FROM: PHILLIP CAPLAN

SUBJECT: Staff Secretary's Office - Objectives Update

Todd submitted to Erskine a "mission" memo on November 24, 1996, and a "goals and objectives" memo on March 1, 1997. This memo serves as an update.

I. Mission

The basic mission of our office remains the same: to manage the paper flow to and from the President. This includes: (i) making sure he gets what he needs on time, but not overloading him; (ii) making sure such paper is sound in substance and form; (iii) executing items that require his signature but not his time; (iv) gathering senior staff views on various matters before presenting those matters to him; (v) summarizing material -- both informational and decisional -- clearly and concisely while sharpening issues for decision; (vi) routing paper back from the President to appropriate staff. Implicit in these aspects of our mission is being the White House "goalie" -- we review all Presidential Press Statements, EOs, Directives, signing statements, etc. before they're made public and view ourselves as preventing mistakes that may have otherwise gone unnoticed.

II. Goals and Objectives

Todd laid out four primary goals. I believe we have clearly met two of the goals, periodically met another, and did not meet the fourth because it was not pursued. In developing a revised list of goals, I'd add three.

Previous Goals

1. GOAL: Maintain a well-modulated flow of paper to the President = **GOAL MET**
2. GOAL: Maintain high quality of materials prepared for the President = **GOAL MET**
3. GOAL: Improve quality and timeliness of daily briefing books = **GOAL MET PERIODICALLY**

This has been a longstanding problem. It's widely perceived that our main customer does not rely on his briefing book heavily. Therefore, we too often get briefing material late and the President ends up getting his book after 9:30 pm. The quality of the material has remained fairly good, but the timeliness is often

embarrassing. We nag staff frequently about this problem and periodically get results, but the performance is spotty. Periodically it gets so bad that I'll raise it at the senior staff meeting. It'll then get better and in a few days drop off again.

In order to fix this problem, we first need to determine if the President cares. If he does (and I've always assumed he does), then I'm convinced the only way to really fix it is to present a log to you daily or weekly with the time material was submitted to this office so that *you* can single out the bad actors. Unfortunately, I don't think this office's complaining works anymore, and it will take a higher authority. (Speeches are another story that should be addressed separately.)

4. GOAL: Improve quality of trip briefing books through preparation of an overview memo for each trip = **GOAL NOT MET (NOT PURSUED)**.

Based on our experience of attempting to produce such a memo in 1996 for several trips, Todd rightly emphasized that to undertake this project would require additional resources.

Additional Goals

5. GOAL: Prepare for transition to Clinton Library.

Confirm
The Office of Records Management (ORM), which reports to me, will soon have to begin preparing current WH staff for transferring records in their offices to the Library. (Records in storage will be shipped to Little Rock). This is a manageable process but somewhat tedious. ORM will be able to handle this task with assistance from Archives and DoD employees, which I understand is standard practice. But, it will take a fair amount of staff education on how to identify and box up records. Beginning mid-next year, we/ORM should send out the first in a series of memos to WH staff on how to accomplish this.

Also, I think it makes sense at some point to begin working with Nancy, Bruce or Skip on Library issues. I understand that Library business is closely held at this point and in no way am I trying to intrude on this, but I think we should be involved at the appropriate time.

6. GOAL: Improve internal issues.

Since taking over this office officially, I've tried to improve it in two areas: (A) staff morale/outreach and (B) customer service.

B. Staff - I've made a conscious effort to spend more time in the OEOP with the various divisions under this office. Most prominently, I've held a series of brown bag lunches with each division (e.g. Student Correspondence, Mail Analysis) and spent time just popping into random offices to say hello. Also, I've tried to be

more timely with personnel decisions. I think both of these efforts have made a difference.

C. Customer Service - This immediate office has always had a stellar reputation for efficiency and quality of work product. However, I've tried to take it to the next level by coupling this reputation for excellence with "service with a smile." That is not to say we had developed a negative reputation, but I have emphasized to my immediate office staff the need to bend over backwards to be responsive, especially with such a large turnover in other WH offices.

7. GOAL: Prepare for new computer system

Correspondence and Records Management have been engaged in a long-term effort with Ginny's shop and various consultants. Its an ambitious plan and I'm skeptical. I've been keeping tabs on it and it sounds like a pretty good plan, but the dates keep slipping and now it is not to be installed until September 1999 (delayed from March). We'll have to keep a close eye on it -- these are two very computer-dependent offices.

5. GOAL: Prepare for transition to Clinton Library.

The Office of Records Management (ORM), which reports to me, will soon have to begin preparing current WH staff for transferring records in their office to the Library. (All records currently in storage will ~~simply~~ be shipped to Little Rock). This is a manageable process but somewhat tedious. ORM will be able to handle this task with assistance from Archives and DoD employees, which I understand is standard practice. But, it will take a fair amount of education of staff on how to identify and box up records. Beginning ~~late~~ next year, we/ORM should send out the first in a series of memos on how to accomplish this.

09/14/95

Debbie, Shelley, Jessica,

Some changes on the staff tripbooks to save us some time

- we do not have to wait until we have the final schedule to get the staff copies to duplicating. Per Todd, the staff uses the minis that scheduling prepares for the schedule anyway. If we have the schedule, go ahead and include; but if you have as much as you are going to get, you can get the staff copies duplicated without it. No need to worry if an event may be added or taken off schedule or if the times on briefing papers are incorrect. Our main concern is the POTUS & SG's books.

In the past, I had been making Stephen's tripbook from a copy that I got back from duplicating. The last several trips, I have been asking for four copies of briefing papers from the staff contact, so I would have enough copies so I could assemble the POTUS' and SG's books since now the staff books may or may not be totally correct.

- when you do the table of contents for the staff books, no need to put A,B,C, D,..... Attached is a sample if you have something 'to be forwarded.' The one exception to this is when the First Lady is also travelling with POTUS. Since she gets a tabbed book, you will have to do A,B,C,D,.....

- Cheryl Rodman is to keep in better contact with us regarding any/all, large or small changes to the schedule, so that we can keep better up to date so we aren't making all these liquid paper changes to briefing papers after we receive the final schedule.

- We are not to give the scheduling office copies of the briefing papers anymore.

If you have any suggestions, please let me know of them.

S

cc: Carol
Phil

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- Remarks

To be forwarded

Illinois Background

- Economic Background

- Local Issues



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

July 21, 1995

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Kitty Higgins
Steve Silverman
Katie McGinty
Shelly Fidler

Phil Caplan

THE WHITE HOUSE
WASHINGTON

June 15, 1995

MEMORANDUM FOR LEON PANETTA

FROM: TODD STERN ¹⁰⁵
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

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

03-Apr-1996 10:46am

TO: Phillip M. Caplan
TO: Helen P. Howell

FROM: Todd Stern
 Office of the Staff Secretary

SUBJECT: terminology

For the record: PDs and PDDs are different creatures.

A PDD is a Presidential Decision Directive generally from POTUS to members of the NSC laying out policy and instructions on a given subject. They are often fairly long and detailed.

A PD is a Presidential Determination of the kind often required by statute before the President can take this or that action -- e.g., a PD that the PLO is complying with its September 1993 commitments so that restrictions on its conduct of business in the U.S. can be waived; or PD that it is in the national security interests of the U.S. to waive this or that provision of law that would otherwise prevent us from doing business with China, or Brazil, or whomever.

End of lesson.



Todd Stern

12/05/96 06:12:59 PM

Record Type: Record

To: James A. Dorskind/WHO/EOP

cc: Phillip Caplan/WHO/EOP

Subject: Re: Hultin and Brown 

Let's talk about this soon -- tomorrow if we can. What concerns me is that I thought processes had been set in place so that you had, at least on a weekly basis, a review of every outstanding BC sig so you could see what was late and where you had to follow up and ride herd. It isn't satisfactory, and will only lead to repeats of this situation (which is a repeat of many earlier situations) to say you'll do better and ride herd in the future. What we need to discuss is *show exactly* this is going to occur. As I've indicated before, I think you need a system that tracks every outstanding BC sig in the system, showing when you received it, who on your staff or outside your staff (e.g., NSC) it has been referred to, etc. and that can be printed out whenever you want. Then I'd think you should have an at least weekly meeting with your key people to review the list and start worrying about anything that was dragging. And I intended that you would meet with Phil once a week to give a quick but very specific update on where things were, reviewing such list. So, basically, what I'd like is to have such a computer tracking system established if it doesn't already exist, and I'd like to be part of a weekly meeting with you and Phil for a little while so I can be sure things are rolling the way I'd like.

Believe me, I well understand that Correspondence has tons of work and carries on in a splendid and unsung way most of the time. But all your good work gets jeopardized when we have to carry up something to the President that is so confoundedly late. If the Hultin letter was lost through no fault of ours between August and October, fine. That should just mean that we give it special priority and make sure that it moves out of here in no more than a week or two once we get it. And if someone like NSC is sitting on it and you need our intervention, we'll provide it -- that's part of the reason to meet with Phil every week. And the same is true for the Brown letter.

We'll talk about this soon. tds

August 9, 1996

Debbie, Trudy and Jennifer,

Re: New Procedure for handling of Correspondence from Nancy
Hernreich or the Oval Office staff

Correspondence from Nancy Hernreich or the Oval Office staff
(with Staff Secretary written on it) give to Phil, or in his
absence to Helen, with your suggested staffing, i.e. Dorskind,
NSC, Scheduling. After Phil and/or Helen have okayed staffing,
make the appropriate number of copies and also put one copy in
dark brown folder for Todd (in file rack next to date stamp).

The folder should be placed in Todd's box first thing in the
morning.

When the folder comes out of Todd's office, review the documents
to see if Todd has made any comments on staffing. If Todd has
made any changes on staffing, handle appropriately and make sure
Helen and/or Phil see Todd's changes.

Carol

cc: Sharon
Helen
Phil

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

<u>TASK</u>	<u>CONTACT</u>	<u>DUE DATE</u>
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

June 13, 1995

MEMORANDUM FOR TODD STERN
PHIL CAPLAN

FROM: G. TIMOTHY SAUNDERS *JS*
Executive Clerk

SUBJECT: Role of the Executive Clerk under the Direction of
the Staff Secretary

Although the Executive Clerk certainly has a myriad of duties and responsibilities in support of the President and his White House Staff -- not all of which relate directly to the Staff Secretary -- we always consider the Staff Secretary's priorities to be our priorities. We work for you.

I have taken the liberty of attaching for your review a brief synopsis of the duties and some historical perspective of the Office of the Executive Clerk.

EXECUTIVE CLERK'S OFFICE

The Office of the Executive Clerk is the oldest operating unit in the White House Office and is staffed by six career personnel (one vacancy). For almost 140 years, under the direction of an Executive Clerk, the office has supported the institution of the Presidency. A highly technical operation based on years of experience in the workings of the Federal Government, the staff has expertise in the constitutional, legal, and traditional functioning of the Presidency.

RESPONSIBILITIES AND MAJOR ACTIVITIES

1) Presidential Documents

All official documents signed by the President come to the Executive Clerk's Office for review, processing, final preparation, and disposition. These documents include the President's civilian and military nominations to the Senate, commissions of appointment, recess appointments, acting designations, Executive orders, proclamations, pardons, letters accepting resignations, special messages to the Congress, veto messages, messages transmitting reports to the Congress (and treaties to the Senate), decisions and determinations, memoranda from the President to units of the executive branch, and certificates and citations that accompany Presidential awards and medals.

2) Presidential Records

The office is charged with creating and maintaining the official permanent White House record of virtually all official Presidential actions and can provide precise information, including historical data, on these actions.

3) Presidential Appointments

The President has the constitutional and legal authority to make appointments to over 4,000 Federal civilian positions, of which almost 2,500 require nomination to the Senate -- roughly 2,000 for full-time positions and 500 for part-time positions.

The Executive Clerk's Office is an authority on the Presidential appointment process, and one of the most important responsibilities and certainly the most demanding task performed by the office is the identification, preparation, processing, and recording of all Presidential appointments. The staff of the office reads each new law, order, or directive to identify any new positions or changes in existing positions that require Presidential appointment and updates the appointment files -- the only complete compendium of all presidentially appointed positions in existence. The office then applies the law and

precedent to the resulting nominations to the Senate, commissions of appointment, and various other appointment documents, virtually all of which are prepared by this office.

As many appointments demand special attention to satisfy legal requirements such as strict staggered term stipulations, the office provides technical advice on a daily basis to the Office of Presidential Personnel concerning current and future appointments.

The office is also responsible for reviewing the hundreds of military officer, foreign service, public health service, and NOAA Officer Corps nominations packages that are required to be submitted to the Senate.

4) Presidential Reports to the Congress

Just as the Executive Clerk's Office reads laws to identify Presidential appointments, it also researches them when reviewing the reports that the President must transmit to the Congress. Statutes currently require that hundreds of individual reports be sent by the President to the Congress. The Executive Clerk's Office maintains a detailed index of all reports (and all communications) that have been submitted by the President to the Congress.

The office receives all reports made to the President by the departments and agencies and is a point of contact at the White House on these reports. When a report is received, the office initiates staffing within the White House after checking the statutory authority governing its submission to determine its legal and proper staffing disposition. The office monitors the progress of the report during the White House staffing process, and after clearance is given by the Staff Secretary, the office prepares the transmittal message for the President's signature and directs the originating agency to print the report in final form. Once the report is ready to be sent, the office delivers the report to the Congress and arranges for announcement by the Press Office.

5) Formal Receiving Point for Bills and Other Communications from the Congress

The office serves as the official point of Presidential receipt for all formal documents from the Congress, including Senate confirmation resolutions, resolutions to the ratification of treaties, and enrolled bills. Delivery of bills to the Executive Clerk's Office is regarded as presentation to the President and as commencing the ten-day constitutional period for Presidential action. As the office tracks the legislation while the bill is at the White House and receives the original law directly after signature, a considerable number of incoming calls to the White House regarding pending legislation are directed to the office. For a sustained period of several weeks towards the end of a session of Congress, the office is particularly besieged with such queries.

6) Transmittals to the Congress

An important and often time-consuming responsibility of the Executive Clerk's Office is the actual physical transmittal of Presidential messages to the Congress. The staff serves as the official "Secretary to the President" when carrying the President's communications (all nominations, special messages and reports, and vetoes) onto the floors of the Senate and the House of Representatives. **In every instance in which the President does not personally transmit his message to the Congress (such as a State of the Union Message), one of his Secretaries (Clerks) carries the message onto the floor of each body --** an almost daily activity that often requires numerous trips to the Hill. The Secretary (Clerk) formally presents the President's message to each house in a traditional ceremony in accordance with custom and the standing rules of each body.

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The Executive Clerk's Office is geared to fast response and has an alert, problem-solving attitude directed at workable solutions, not institutionalizing or perpetuating problems. The office has long served as the institutional memory of the Presidency in matters within its purview, and based upon that memory, provides advice and information to many. The Executive Clerk's Office staff is especially sensitive to the necessity of employing great care and precision when responding to staff and public queries and in preparing Presidential documents.

ADMINISTRATIVE INFORMATION

The office is open from approximately 7:30 a.m. to 7:00 p.m. daily and from 10:00 a.m. to 2:00 p.m. each Saturday; however, coverage beyond these hours is common and performed on an as-needed basis.

The staff consists of the following:

G. Timothy Saunders	Executive Clerk
Sara Currence Emery	Deputy Executive Clerk
David Kalbaugh	Assistant to the Executive Clerk
William McCathran	Assistant to the Executive Clerk
Edwin Thomas	Assistant to the Executive Clerk
Vacancy	Assistant to the Executive Clerk

TENURE OF THE STAFF OF THE EXECUTIVE CLERK'S OFFICE

G. Timothy Saunders

Government service began in 1973 with the Secretariat Staff of the National Security Council (NSC) at the White House on a part-time basis while attending college; accepted a full-time position with the NSC Secretariat in 1978; joined the Clerk's Office in February 1980.

Sara Currence Emery

Government service began at HUD in 1969; came to work at the White House in 1971; joined the Clerk's Office in December 1985.

David Kalbaugh

Government service began in 1986 in the Publications Office, Office of Administration; joined the Clerk's Office in August 1988.

William McCathran

Government service began in 1986 in the Department of the Navy; came to work at the White House in April 1989 in the Office of Records Management; joined the Clerk's Office in September 1990.

Edwin Thomas

Government service began in 1991 as a Mail Analyst, White House Correspondence Office; joined the Clerk's Office in September 1992.

HISTORY OF EXECUTIVE CLERKS AT THE WHITE HOUSE FROM 1865
WHO SERVED FOR LONG PERIODS OF TIME

William H. Crook

Lincoln - T. Roosevelt

1865 - 1869 Private bodyguard/Appointments Clerk
1869 - Clerk 3rd Class (Johnson)
1870 - Executive Clerk (Grant through T. Roosevelt)

Served 11 Presidents (including Cleveland twice) for approximately 44 years. Exact departure date during T. Roosevelt Administration unknown. Died in 1915.

Oscar L. Pruden

Grant to T. Roosevelt

1869 - 1902 Clerk/Executive Clerk/Assistant Secretary to the President

Served 9 Presidents (including Cleveland twice) for approximately 33 years. Died 1902 during T. Roosevelt Administration.

George Cortelyou

Cleveland - T. Roosevelt

1895 - 1896 Stenographer to the President/Clerk
1896 - 1898 Executive Clerk
1898 - 1900 Assistant Secretary to the President
1900 - 1903 Secretary to the President

Although he served only 8 years at the White House, he is included on this list because he also served during his distinguished career as the first Secretary of Labor and Commerce, Postmaster General, and Secretary of the Treasury under Theodore Roosevelt. After he left government service, he became the President of the Consolidated Gas Co. of New York, one of the largest and most important utilities in the country. Died in 1940.

Cortelyou hired Rudolph Forster and Maurice Latta as Clerks in 1897 and 1898 (see below).

Rudolph Forster

Hayes - F. Roosevelt

1897 - 1943 Stenographer to the President/Clerk/Executive Clerk/Assistant Secretary to the President/Chief Clerk/Executive Clerk

Served 9 Presidents for 46 years. Forster died in 1943.

Maurice Latta

Hayes - F. Roosevelt

1898 - 1948 Stenographer to the President/Clerk/Assistant Secretary to the President/Executive Clerk/Records Clerk/Executive Clerk

Served 9 Presidents for 50 years. Latta Died in 1948.

(more)

William J. Hopkins

Hoover - Nixon

1931 - 1948 Stenographer to the President/Senior Clerk/Assistant Chief of White House Correspondence and Assistant Executive Clerk. (Took dictation from President Hoover.) Johnson insisted that Hopkins accept the new title of Executive Assistant to the President in recognition of his long service.

1948 - 1966 Executive Clerk

1966 - 1971 Executive Assistant to the President and Executive Clerk

Served 7 Presidents for 40 years. Retired in 1971.

Thomas M. Jones

Truman - Reagan

1951 - 1978 Clerk/Records Clerk/Chief of Presidential Records

1978 - 1981 Executive Clerk

Served 8 Presidents for 30 years. Retired in 1981.

Ronald R. Geisler

Johnson - Clinton

1964 - 1981 Legislative Clerk/Records Clerk/Assistant Chief of Presidential Records/Assistant Executive Clerk

1981 - 1994 Executive Clerk

Served 7 Presidents for almost 30 years. Retired in May 1994.

G. Timothy Saunders

Carter -

White House service began in 1973 with the Secretariat Staff of the National Security Council on a part-time basis while attending college; accepted a full-time position with the NSC in 1978; joined the Executive Clerk's Office in February 1980.

1980 - 1994 Assistant to the Executive Clerk/Bill Clerk/Assistant Executive Clerk/Deputy Executive Clerk

1994 - Executive Clerk

NOTE 1: The previous listing does not include the following executive clerks who served for 1) relatively short periods of time (e.g., less than 5 years) or 2) in a junior capacity. The exact number and all of their names are unknown as many of their personnel records were destroyed. The ones we are aware of follow:

Sara Currence Emery 1985 -	Began White House service in 1969 with the Office of the Staff Secretary, and except for 2 1/2 years at the Department of Housing and Urban Development, worked from 1971-1985 in the White House offices of speechwriting, administration, and the Staff Secretary before joining the Executive Clerk's Office in December 1985. Appointed Deputy Executive Clerk in 1994.
Douglas W. Chirdon 1977 - 1992	Assigned to the White House Communications Agency in 1964. Remained in WHCA until 1975 when he retired from active military duty and joined the White House staff. Assigned to the Executive Clerk's Office in 1977. Was appointed Deputy Executive Clerk in 1990. Retired in 1992.
Daniel J. Marks 1973 - 1990	Worked for the White House Communications Agency from 1970 until 1973 when he began work in the Executive Clerk's Office. Appointed the Deputy Executive Clerk in 1982 and served in that capacity until his death in November 1990.
Robert D. Linder 1974 - 1978	Former budget official in the Office of Management and Budget, who was appointed with the title of Chief Executive Clerk in 1974. In 1976 he was appointed Special Assistant to the President, but also retained the title of Chief Executive Clerk. His primary duty was the supervision of the White House operating units and the handling of White House correspondence. The preparation and handling of presidential documents/papers continued to be performed by Jones and Geisler. In 1978 he was asked to resign as clerk. He accepted the position of Executive Secretary of the Federal Home Loan Bank Board. He was the last Executive Clerk to have an office in the West Wing.
Nobel Melencamp 1971 - 1974	Foreign Service Officer - Class 2 who was detailed to the correspondence section at the beginning of the Nixon Administration to prepare letters for the President's signature. He then became Assistant Chief of Correspondence. Upon the retirement of Mr. Hopkins in 1971, he was named interim Executive Clerk to supervise the White House operating units and to continue with the President correspondence and to help recruit a permanent executive clerk. The preparation Melencamp and handling of presidential documents/papers continued to be performed by Jones and Geisler. Like Hopkins and all previous Clerks, he had an office in the West Wing of the White House.
A. Wayne Hawks 1964 - 1968	In 1941 he was detailed to the White House as a telephone and telegraph operator. Also served as Communications Officer, Assistant Chief of Mails, and Chief of Presidential Records. He was named Assistant Executive Clerk in 1964 and upon Mr. Hopkins elevation to Executive Assistant to the President in 1966, Hawks was named Executive Clerk. He died at his desk in the West Wing on April 9, 1968.
Charles M. Hendley 1877 - 1889	Was O.L. Pruden's brother-in-law and was appointed an executive clerk when Pruden was elevated to Assistant Secretary during the Hayes Administration. Hendley served for 12 years before taking a better paying position as private secretary to the Secretary of the Treasury during the Harrison Administration.
Henry C. Morton 1877 - 1885	Was a clerk during Hayes Administration, transferred from the Treasury Department. Discharged by Democrat Grover Cleveland.

J. S. Bolway 1880 - ?	Was a clerk during Hayes Administration, transferred from the Treasury Department.
W. R. Duke 1879 - ?	Was a clerk during Hayes Administration.
Robert L. O'Brien 1893 - 1895	Was an executive clerk during Cleveland's second term.
Benjamin F. Barnes 1898 - 1906	Was an executive clerk during the McKinley Administration and an assistant secretary to the President during the T. Roosevelt Administration.

HISTORICAL
NOTES:

Clerks as "Secretaries to the President" -- When delivering messages from the President to the floors of the Senate and House of Representatives, the clerk is always referred to in the formal ceremony by the chair as "Mr./Madame Secretary." This appellation can be traced back to the first secretary to a President authorized by law (1857), James Buchanan Henry (who was President Buchanan's nephew), who had the duty to deliver such communications to the Congress. Subsequent secretaries to the President continued this practice until the late 1890's when this duty was taken over by the executive clerks.

Formal coat and tails were worn by Forster and Latta when delivering messages from the President on the floor of the House and Senate (they made their way to the Capitol by bicycle! Unclear if other executive clerks or secretaries to the President wore the same attire when they delivered messages to the Congress).

Executive Clerks have long administered the oath of office to officers of the government -- Colonel Crook mentions in his reminiscences Through Five Administrations of administering the oath of office to Secretary of War Robert Lincoln in 1881 at the beginning of the Garfield Administration (Robert Lincoln was, of course, President Lincoln's son).

In March 1865 William Crook accompanied President Lincoln to Richmond, Virginia, after it was captured from the confederacy.

In 1868 Crook, having run all the way from the Capitol to the White House after the Senate vote, was the first person to tell President Andrew Johnson that the Senate had acquitted him in his impeachment trial.