

THE WHITE HOUSE 2001 PROJECT
THE WHITE HOUSE INTERVIEW PROGRAM
REPORT NO. 4

A TALE OF TWO TRANSITIONS
1980 AND 1988

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1980 AND 1988

John P. Burke, *University of Vermont*

The 1980 Reagan transition and the 1988 Bush transition offer important case studies for understanding the challenges of the upcoming presidential transition. Although not without its shortcomings, the 1980 transition was, at least comparably, the most successful of the transfers in power since the modern era of presidential transitions commenced with the Carter effort in 1976. 1988 offers useful lessons about “friendly takeovers”: the passing of power from a president to a president-elect of the same party. The 1988 transition is of interest, moreover, whether Al Gore or George W. Bush wins. For Gore, it offers the only instance of a sitting vice president elected to the presidency since Martin Van Buren in 1836. For George W. Bush, of course, it was the ascendancy of his own father to the office and a transition in which he and some of the other members of his inner circle participated.

I. THE 1980 TRANSITION

The Reagan transition of 1980, while not perfect by any means, offers a number of important lessons, particularly when presidential power falls to someone from outside the Washington beltway. Its pre-election effort was marked by harmonious relations between transition planners and the campaign staff, aided in no small measure by the direct and continual oversight provided by Ed Meese, the campaign’s director. Pendleton James, who headed the pre-election effort, also operated under a more limited mandate: a personnel planning operation rather than the more ambitious effort Jack Watson had headed for Carter in 1976 or that Mickey Kantor undertook for Clinton in 1992. **Ed Meese** was particularly attuned to lessons to be gleaned from predecessors, particularly the Carter experience in 1976:

We’d seen other presidencies where they were already wrangling over positions in the White House while the campaign was going on and in some of those cases they didn’t even win. We didn’t want to have anything that diluted the effort of winning the campaign.¹

James operated out of the media limelight, moreover, and key advisers to the candidate such as Meese, William Casey, and Michael Deaver worked to still any public venting of the internal workings of (and possible rifts within) the Reagan camp.

¹. White House Interview Program, Interview with Edwin Meese, Martha Joynt Kumar, Washington, D.C., January 21, 2000.

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Even Ronald Reagan was an active force, both in making the final decision to have James prepare for his possible presidency as well as cautioning James that he needed to act without publicity. William Casey, the campaign's chairman, had opposed the effort, while Meese had pushed it. Reagan made the final call according to **Pendleton James**:

Reagan looked at me and he said, "I agree with Ed [Meese]. We really have to be prepared if we do win this thing. But Bill's [Casey] right, if it leaks out, it's a negative story. Pen, can you do this and not have it leak out?" I said, "Governor, that's what I do in real life. I'm an executive recruiter."....He said, "Okay, I want it done but I don't want your name ever to appear."²

James's limited mandate meant, furthermore, that some of the activities that some pre-election transition operations have undertaken would be handled elsewhere. Meese himself took on the job of organizing the post-election transition. Nor was a separate policy shop set up, as had occurred in 1976. Foreign and national security policy remained under the direction of Richard Allen, who coordinated the work of some 132 outside advisers grouped into 25 task forces. In domestic and economic policy, Martin Anderson enlisted the aid of 329 advisers grouped into 23 task forces. Both Allen and Anderson, moreover, were veterans of the 1968 Nixon transition. There would be no "hijacking" of the policy agenda by the transition group, as some in the Carter campaign had perceived four years earlier.

Nor did the campaign staff become distracted by the transition work that had begun. According to **Pendleton James**, "The guys in the campaign were only worried about one thing: election night. I was only worrying about one thing: election morning." James's efforts also had paid off in giving him a head start on the personnel operations he would direct during the post-election transition. In fact, the morning after the election Reagan met with his senior advisers, and James wrote down the following comment: "there is no start up and there is no learning time for presidential personnel. It has to start its operation the morning of the election."³

POST-ELECTION TRANSITION QUICKLY UP AND RUNNING

Although some observers have viewed the post-election transition in 1980 as over-organized and cumbersome, it operated smoothly and effectively for the most part.⁴ Meese's work paid off with a quick announcement of the transition's organization by President-elect Reagan at his first post-election press conference on Thursday, November 6. Although nominally headed by William Casey (with Anne Armstrong serving as vice-chair), the transition was under Meese's day-to-day direction. It was also an effort that drew not just from Reagan's California associates but from other parts of the Republican party, plus a heavy dose of those with Nixon and Ford White House experience.

Even before his appointment as chief of staff was announced, James Baker was placed in charge of White House organization and planning. His efforts in this regard are a model for how a chief of staff can effectively prepare for a new White House. By November 15, Baker had already met with Chief of Staff Jack Watson and Staff Director Al McDonald of the Carter White House, and he had set up twenty transition teams to examine

2. White House Interview Program, Interview with Pendleton James, Martha Joynt Kumar, Washington D.C., November 8, 1999.

3. White House Interview Program, Interview with Pendleton James, Martha Joynt Kumar, Washington D.C., November 8, 1999.

4. One area that is often cited for criticism were the teams sent out to each department and agency. A number of Washington veterans appointed to cabinet positions such as Al Haig and Caspar Weinberger felt that their work was less than useful. Other teams, particularly those assigned to the independent regulatory agencies, encountered some resistance, particularly where team members were drawn from private sector enterprises under the agencies' regulatory domain and where possible conflict of interest question might arise. See John P. Burke, *Presidential Transitions: From Politics to Practice*, (Boulder: Lynne Rienner, 2000) pp. 98-99.

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each of the units in the Executive Office of the President. By the third week in November, Baker had begun a series of meetings with former chiefs of staff and other former White House officials, including Don Rumsfeld and Dick Cheney.

In making White House staff appointments, Baker took care to include longtime Reagan associates such as Michael Deaver and Lyn Nofziger, who was tapped for the political affairs office. But he also cast his net widely: Elizabeth Dole was picked for public liaison operations, for example, while Rich Williamson, an aide to Senator Paul Laxalt (R-Nev.), was brought on to direct intergovernmental relations.

Baker's efforts here are especially in contrast to the late staff appointments made by the Clinton transition in 1992 (some just days before his inauguration), as well as the quality and expertise of Baker's picks. More generally, as **James Cicconi** (who would serve as one of Baker's deputies then as George Bush's staff secretary) notes, the early appointment of a chief of staff is critical:

That needs to be one of the earliest appointments a president-elect makes in large part because that organizes the President's own personal staff support for virtually all his subsequent decisions and for the vetting of those decisions, even potential cabinet appointments....You need that. And to ensure the smooth functioning of a decisionmaking process so that if a president-elect makes decisions during the transition they get acted upon; there is follow-up. All of that has to depend pretty heavily on at least a skeletal staff structure being put in place as quickly as possible in the transition.⁵

POSSIBLE FAULT LINES

There were developments during the 1980 transition that might have led to considerable internal turmoil, most notably the selection of Baker rather than Meese as chief of staff. Yet Baker and Meese were able to work out their differences quickly and settle on a division of labor. The kind of internecine warfare that sometimes erupts in transitions between the campaign staff and the transition group or between those with longer association with the president-elect and newcomers who are brought on board did not develop, at least initially.

What would prove problematic, however, was the organizational structure devised and the way that Baker and Meese divvied up their respective responsibilities. As "counselor to the president," Meese was placed in charge of both domestic and national security policy development (the latter was a particular mistake, with NSC adviser Richard Allen reporting through Meese rather than directly to the president) as well as given responsibility for coordinating the input of the cabinet. For his part, Baker coordinated and supervised all White House staff functions, hired and fired all White House personnel, presided over meetings of the White House staff, coordinated the White House paper flow, and set the president's appointments and schedule.

The division of labor proved consequential. Although the media was quick to label Baker's job as "administrative," it quickly became clear that it was more than that, if not in fact "political" in some important sense. Baker controlled the liaison units, the political affairs office, and, most importantly, the congressional affairs unit, each of which had important "political outreach" and liaison functions. Once in office, Baker's morning staff meetings would be crucial in defining the daily agenda of the administration. The "legislative strategy group" he created would be especially important in the administration's dealings and negotiations with Congress. Policy making had been split, in a sense, from politics in the arrangement. The ability to pull them together in a coherent manner would turn on the working relations among Reagan's top aides.

Developing a sense of teamwork is critical, especially to the internal workings of the White House staff. As **Bowman Cutter** (one of the few participants in both the Carter and Clinton transitions, as well as their

⁵. White House Interview Program, Interview with James Cicconi, Martha Joynt Kumar, Washington, D.C., November 29, 1999.

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administrations) observes: “Incoming presidents, the one characteristic they and their staff have is arrogance....the level of self-engendered hysteria and arrogance in those first weeks is so great.”⁶

But teamwork is not only critical once the administration is underway, it needs to commence during the transition. In 1980, **Ed Meese** recognized this:

The teamwork concept...we tried to carry through the whole transition. We would start each day at seven o'clock and between seven and seven-thirty we would have a meeting on policy issues....Then from seven-thirty to eight we would have a meeting of the heads of the different divisions of the transition....So there were these events on a regular basis to develop a sense of teamwork. Everybody knowing what was going on so that there weren't any mysteries or little antagonisms building up at an early stage, which is not uncommon in this kind of operation.⁷

ATTENTION TO DECISION MAKING

The transition period also provided a time for planning and then operationalizing the various channels of information and advice that Reagan would utilize once in office. This attention was directed not only at the analysis of White House operations that Baker undertook, but also to other parts of this administration's decision-making processes. **Al McDonald**, Carter's staff director, particularly emphasized this in his meetings with Baker and Meese during the 1980 transition. As he later observed,

Talk to the candidate about how he wants to run the presidency because each of these are tailor-made suits....None of them have been president before. Whether they've been governors or not is a different thing, whatever their past experience is.⁸

Like his predecessor, Reagan's gubernatorial experience served as the foundation for what would become his presidential decision-making processes, particularly how the cabinet would be used. But whereas Carter did not take up the issue of precisely how input from the cabinet might be structured and ended up with an ill-fitting combination of full cabinet meetings and poorly organized task forces, Reagan and his associates used the transition period to think about how the cabinet might better be brought into administration's policy-making deliberations

Ed Meese's role in crafting what would become the Reagan cabinet council system was a particularly important piece of his transition activities. Meese realized that Reagan's experience in Sacramento of relying on his agency heads could not be replicated at the federal level with its larger number of departments. Yet Meese also recognized that Reagan valued their deliberative input and wanted to foster stronger bonds and a sense of teamwork that would be needed to harness them to the administration's policies and perspectives rather than the bureaucratic parochialism of their respective departments. A number of proposals were discussed from November through January, and by early February closure was reached on the initial five cabinet councils as well as the mechanisms through which they would be coordinated by the White House staff.

Although the eventual record of the cabinet council system was somewhat mixed--some councils proved more successful than others--at the very least Reagan and his advisers had given some thought to the cabinet's role in the policy process. It was quite unlike the situation four years earlier when there was much rhetoric about cabinet government but little consideration of how it might be achieved.

⁶. White House Interview Program, Interview with Bowman Cutter, Martha Joynt Kumar, Washington, D.C., November 8, 1999.

⁷. Burke Interview with Ed Meese, May 27, 1998.

⁸. White House Interview Program, Interview with Alonzo McDonald, Martha Joynt Kumar, Washington D.C., February 2, 2000.

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The work undertaken by Meese and Baker during the transition, moreover, paved the way for Reagan's first-year success; it was a case study for what a successful transition buys a new president. As **Marlin Fitzwater** observes:

I think when Reagan first started Jim Baker and his staff were highly competent people who passed the 1981 tax cuts which were the economic centerpiece of the whole administration....They knew how to deal with the Congress. They knew how to get things done....I also think Ed Meese's domestic council operation was the most creative and ingenious White House management function....He would bring in the principals only--it had to be the cabinet officers--and their staffs who knew about it and they would have these discussions about what should administration policy be, what they should do. They would argue and debate and really have to deal with the issues in the White House. In my ten years in the White House, they were clearly the most creative discussions, the most productive discussions, the most productive conclusions and the most genuine government, high-level consideration of a problem that I ever saw.⁹

BUILDING BRIDGES TO CONGRESS

One important part of the 1980 transition was the effort undertaken to build a better relationship with Congress than had been the case four years earlier. Meese created a "congressional advisory group" as part of the transition's formal organization and it was headed by longtime Reagan friend Senator Paul Laxalt of Nevada. In foreign and national security policy, a bipartisan commission of four senators was established (Democrats Henry Jackson of Washington and Richard Stone of Florida, and Republicans John Tower of Texas and Howard Baker of Tennessee, the new majority leader of the Senate).

Other steps to develop better relations with Congress were also undertaken. As part of his efforts to reorganize the White House staff, James Baker moved the White House congressional affairs unit (the White House's lobbyists on Capitol Hill) from the Old Executive Office Building back into the White House proper. According to the administration's 1981 self-study of the 1980 transition, the move was done to "indicate the importance the Reagan administration wanted to place on relations between the Congress and the White House."¹⁰ As part of the transition's organization, Meese also created an office of congressional relations, headed by Tom Korologos a prominent lobbyist and a veteran of the Nixon and Ford congressional affairs staff. Korologos's unit handled all of the resumes and job referrals coming from the Hill, set up the many courtesy calls and visits by Reagan and other key members of the Reagan team with members of Congress, and otherwise sought to develop a smooth relationship. While overall direction on the "big issues" was set in Meese's 7:00a.m. senior staff meeting, the unit handled many of the little things that the Carter transition had often ignored four years before: tickets to inaugural events, Reagan's position on minor bills, thank-you notes and so on.

Reagan's own efforts were also an important part of the equation. According to the administration's transition study, "The biggest successes...were in [Reagan's] visits to the Hill, the lunches in Blair House, the one-on-one visits set up with leaders early on."¹¹ Throughout the transition, moreover, members of the Reagan team--especially Nancy Reagan--sought to introduce themselves to "social Washington," many of whom, while Democrats, had been ignored by the Carter White House.

⁹. White House Interview Program, Interview with Marlin Fitzwater, Martha Joynt Kumar, Washington, D.C., October 21, 1999.

¹⁰. Draft Report, "Transition of the President and the President-Elect," Meese Files, OA5097, Reagan Library.

¹¹. Draft Report, "Transition of the President and the President-Elect," Meese Files, OA5097, Reagan Library.

STRATEGIC PLANNING

One innovation in the 1980 transition involved the creation of an Office of Planning and Evaluation under the direction of campaign pollster Richard Wirthlin. The efforts of Wirthlin and his staff (which included White House veterans David Gergen and Roger Porter) especially focused on planning an overall strategy for the new administration. Their most important product, an “Initial Actions Report,” emphasized the need to act quickly to take advantage of the honeymoon period with Congress. As **Ed Meese** later recalled,

Dick [Wirthlin] put together a strategic plan that integrated our major policy issues which we knew from campaign days were going to be economic revitalization and rebuilding the military as our two primary goals. He put that together with the communications plan that came from the communications people....He put that together with the legislative plan that came to us from Tom Korologos and the people working the Hill....So we had a pretty good plan on inauguration day, strategic plan of where we wanted to go, so that we didn't dilute the President's efforts and so that we integrated the various efforts of the White House in furtherance of this particular plan.¹²

Unlike Carter's laundry list four years earlier, the need for a more focused and limited agenda--largely directed at enacting the president-elect's economic program--was emphasized. The report's analysis was especially framed around a 3,000 respondent survey Wirthlin had conducted after the election and the recognition that policy efforts needed to meet public expectations. In addition, David Gergen prepared a lengthy study entitled “The First 100 Days,” which meticulously chronicled all of the activities of Reagan's predecessors in office back to FDR. Wirthlin and his associates also developed a detailed personal schedule for the president covering his first four weeks in office. Although their suggestions do not exactly match Reagan's actual daily calendar, there are a number of striking similarities to meetings and events that were held.

“REAGANOMICS” DURING THE TRANSITION

The one area where the Reagan transition was a bit less than crisp was in moving his budget and tax plans from campaign rhetoric to concrete proposals. The ground work had been laid by some of the task forces Martin Anderson had organized during the campaign, as well as by Reagan's own commitment to cuts in domestic spending and significant tax reductions. During the early weeks of the transition, Caspar Weinberger took the lead on budget matters, while George Shultz headed an economic coordinating group that sought to pull the pieces together, particularly in reaffirming Reagan's commitment to tax relief.

Yet the real job of finding real cuts fell to David Stockman, whose appointment as OMB director was announced on December 3. **Stockman** “soon discovered,” as he relates in his memoirs, that it would be up to him to “design the Reagan Revolution.” He quickly found that while “everything was getting attention, nothing was getting priority.”¹³ Time was of the essence-- a plan would have to be devised within ten to fifteen days of Reagan's inauguration.

One difficulty Stockman faced early on was obtaining accurate forecasts crucial in determining revenue estimates on the supply side and entitlement demands and cost of living increases on the demand side. Yet by January, no appointments had been made to the Council of Economic Advisers, the usual in-house source of such projections. Stockman attempted to muddle through, drawing on an interim forecasters group, but they too could not reach agreement on the five-year scenario required by the congressional budget process. “This meant

¹². White House Interview Program, Interview with Edwin Meese, Martha Joynt Kumar, Washington, D.C., January 21, 2000.

¹³. David Stockman, *The Triumph of Politics: How the Reagan Revolution Failed*, (New York: Harper and Row, 1986) p. 75.

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we would be flying blind for a while as to the precise size of the spending cut needed to balance the equation. We'd be scrambling to assemble the budget cut package while working against a moving target."¹⁴

Stockman presented his preliminary findings to Reagan and his advisers at a meeting held on January 7, 1981, at Blair House. His presentation took the second hour. He came well-prepared with copies of the first of his many briefing books. Using a chart, he showed that Jimmy Carter's FY 1981 "balanced budget" was already \$20 billion in deficit in September, \$38 billion by November and, now, \$58 billion by January--the latter without even figuring in the cost of the proposed tax cuts. Near the end of the meeting, Stockman hurriedly discussed the need for \$75 billion in cuts per year, with perhaps more needed if the Kemp-Roth tax cut plan were enacted. "I thought this would have a sobering effect. My message was that far more sweeping and wrenching budget cuts than we had told the public about would be needed." "But they didn't grasp that...With the exception of Marty Anderson and Alan Greenspan, no one in the room betrayed any comprehension of what the federal budget looked like or how it was calculated."

Returning to his office, Stockman looked at Reagan's schedule and discovered he had already used up a quarter of the time Meese had allocated between then and inauguration day for discussions with Reagan present on the upcoming budget. "We hadn't even scratched the surface." The Reagan revolution "would not be a simple matter of 'limiting the rate of increase in federal spending,' as Meese kept phrasing it. It would involve drastic reductions in dozens of programs."¹⁵

That Stockman had begun as early as he did enabled him to grasp the difficulties of the task ahead. But his experience during the transition, particularly in getting others to take seriously the enormity of the task ahead, was a portent of future difficulties. The absence of reliable economic indicators and the delay in naming the CEA, a primary resource on such matters, were areas where the transition process had not been up to full speed. But they forged ahead, and the seeds were sown for the mounting deficits of the Reagan and Bush years.

SUMMARY

The 1980 Reagan transition is notable, compared to what occurred before and after, for the presence of a president-elect who was its center piece but not its driving force. While Ronald Reagan provided broad policy direction and was the reference point as some of the decision processes were cut and tailored to his needs, a presidency had been created in which much was delegated. Its test would come, first, in whether the arrangement was fundamentally sound in the way staff responsibilities had been parcelled out; and second, whether President Reagan could rely on the skills and expertise of those selected and whether his trust would be repaid in competence and in securing the policies to which he was so deeply committed.

II. THE 1988 TRANSITION

Not only was George Bush's 1988 transition to the presidency a "friendly takeover" by a sitting vice president, it was a passage to the presidency by a seasoned political insider whose pre-presidential experience had encompassed a variety of legislative, executive, and political roles: businessman, local party leader, member of the House, Senate candidate, national party chairman, U.N. ambassador, liaison chief to China, and director of the

¹⁴ Stockman, *Triumph of Politics*, p. 85.

¹⁵ Stockman, *Triumph of Politics*, pp. 87-90.

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CIA. Not surprisingly, Bush began to prepare early for a possible presidency, enlisting the services of longtime associate Chase Untermeyer¹⁶ early in 1988.

Untermeyer's mandate, however, was limited: "My charter was simply to prepare a plan for the transition and for a transition headquarters, but do nothing in the way of personnel," he would later recall.¹⁷ As another Bush aide would later observe, the effort was "very reflective of George Bush....He was trying to do this smaller, more quietly, using a rifle rather than a shotgun approach, trying to maintain, in the positive sense of the word, some kind of dignified yet reflective control of the process."¹⁸ Bush's own career preparation for the presidency, particularly his eight years as vice president, placed him in the position where he did not need the more extensive transition efforts of Carter in 1976 or Reagan in 1980. This was not a political outsider and his local entourage arriving unprepared at the White House steps.

As in 1980, oversight was crucial to the success of the pre-election transition effort. In 1988, however, this was provided directly by Bush, John Sununu and James Baker, who met a number of times with Untermeyer. Moreover, a number of crucial decisions were made during this period that would affect not only the transition but also the Bush presidency. One was Bush's decision that Untermeyer would not only head up the personnel operation during the post-election period but also serve as director of White House personnel. Another early decision that was made was the selection of C. Boyden Gray, another key member of the Bush inner circle, to serve as the transition's legal counsel and then as White House legal counsel. As **Gray** would later recall, "Bush asked me to go work for him two weeks before he was elected and he said, 'I should have asked you two months ago.'....The volume of paper that goes through the White House Counsel's Office is ten times that of all the other offices combined."¹⁹

Both of these decisions provided a crucial element of continuity to the daunting appointments process that lay ahead. According to **A.B. Culvahouse**, the White House's legal counsel toward the end of Reagan's second term, "In the normal day-to-day functions of the White House Counsel's Office when I was there, it took anywhere from eight to ten lawyers full time just doing vetting."²⁰ For a new administration the task and resources needed are obviously of greater magnitude, and any early preparation will undoubtedly be of considerable help. As **Boyden Gray** observes, "You should start people filling out those forms, I think, before the election. Certainly the day of the election there ought to be 100 people doing nothing but filling out those forms." As to the job of White House legal counsel:

The incoming White House counsel should interview previous White House counsel and be immersed on all of the land mines that he or she is going to face. An hour and a half three days before inauguration is not enough.²¹

^{16.} Untermeyer first met Bush when Bush was running for Congress in 1966. He later served as his executive assistant (1981-1983), deputy assistant secretary of the Navy for installations and facilities (1983-1984), and assistant secretary of the Navy for manpower and reserve affairs (1984-1988). Untermeyer's work on the transition did not begin in earnest until April, when Bush's nomination was secure. At a meeting in Kennebunkport over the Memorial Day weekend, Bush gave the final go-ahead and notified his campaign staff that Untermeyer would be undertaking transition planning.

^{17.} Burke correspondence with Chase Untermeyer, December 9, 1998.

^{18.} Burke interview with J. Bonnie Newman, September 29, 1998. Newman had been associate director of White House personnel and an assistant secretary in the Commerce Department during Reagan's first term. She would become assistant to the president for management and administration in the new Bush White House.

^{19.} White House Interview Program, Interview with C. Boyden Gray, Martha Joynt Kumar and Nancy Kassop, Washington, D.C., October 4, 1999.

^{20.} White House Interview Program, Interview with A. B. Culvahouse, Martha Joynt Kumar, Washington D.C., September 15, 1999.

^{21.} White House Interview Program, Interview with C. Boyden Gray, Martha Joynt Kumar and Nancy Kassop, Washington, D.C., October 4, 1999.

***ADVANTAGES OF A FRIENDLY TAKE-OVER
A LITTLE (AND EARLY) HELP FROM SOME FRIENDS***

In contrast to the more cautious approach prevailing within the Bush camp, the Reagan administration undertook a series of steps to prepare for an orderly transfer of power. Its efforts here far exceeded those of recent out-going administrations, and they provide important evidence of the advantages that accrue when power passes to a president-elect of the same party. As **Ken Duberstein**, the out-going Reagan chief of staff, later observed:

Reagan wanted it seamless. Reagan wanted it the best hand-off that he could possibly get...Certainly there were sensitivities. Certainly there were difficulties but it wasn't two ships passing in the night. There were enough of us who knew each other so well that you could work things out.²²

Some of the memoranda prepared by the Reagan White House offer an interesting window on the kind of communication and passing of information that can occur with a friendly take-over. On November 1, 1988, **Robert Tuttle**, director of the White House personnel office, forwarded a memorandum to Chief of Staff Kenneth Duberstein titled "Transition Planning." Item 2 of the memo stated: "I have met on approximately a half dozen occasions with Chase Untermeyer for in-depth discussions and have thoroughly briefed him on the operation and organization of Presidential Personnel." No mention is made of briefings with members of the Dukakis campaign.

Tuttle goes on to note that he, his associate directors and Untermeyer's deputy, Ross Starek, have reviewed "in depth the approximately 550 presidential appointments requiring Senate confirmation." "We have given them an appraisal of each position the Bush Administration will have to fill, an outline of the budget and staff requirements for each position, a candidate profile, an appraisal of the incumbent, and an indication of the incumbent's interest in remaining in the position."²³

J. Bonnie Newman, who would shortly use these and other materials developed by the Reagan White House in her personnel work during the transition, found these volumes "very, very helpful." Newman also had access to the personal descriptions she had worked on as a member of the Reagan personnel office in 1981. In addition, Dick Kinser of the White House developed a helpful "how to" personnel guide, which set out qualities to look for in prospective candidates, interviewing techniques, advice on how to organize personnel work, and other matters relevant to the effective screening of candidates. To have all of this, "during the Bush transition really gave us a head start," Newman would later observe.²⁴

Chase Untermeyer recalls that his pre-election meetings with Tuttle at the White House were "extremely valuable." Half of his sessions with Tuttle and his assistants were lengthy affairs in which they proceeded "department by department, agency by agency, job by job, as to what the various positions and responsibilities were, what kind of people were there now, and candidly assessing who would be good to retain, who would be good to move to another position, or who would be good to terminate."²⁵

The briefing books that Tuttle had requested his staff to prepare were extremely useful, according to Untermeyer. "Each book contained the 'authority sheets' for each presidential appointment, with the staffer's experienced judgment as to which jobs were the most important, the most difficult, the hardest to fill, etc. These

²². White House Interview Program, Interview with Ken Duberstein, Martha Joynt Kumar, Washington, D.C., August 12, 1999.

²³. Memorandum from Robert H. Tuttle to Kenneth M. Duberstein, November 1, 1988, "Transition Planning," FG001-04 606669, Reagan Library.

²⁴. Burke interview with J. Bonnie Newman, September 29, 1998.

²⁵. "The Reagan to Bush Transition: A Miller Center Panel and Colloquium," in Kenneth W. Thompson ed., *Presidential Transitions: The Reagan to Bush Experience*, (Lanham, MD: University Press of America, 1993) p. 180.

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books became the hour-by-hour bosom companions of my own personnel staff after the election.”²⁶ Untermeyer would later recall that “None of this was available to my counterpart in the Dukakis campaign, nor could it have been.” Furthermore, “in a normal transition of one party to the other, all that would have been delayed until the actual transition, and even then it would have been shared grudgingly at best.”²⁷

The Reagan White House and the Bush transition’s legal office also may have been in contact before election day, particularly in getting up to speed in preparing the financial disclosure forms and setting up the clearance process and background checks that presidential appointees must now deal with. According to **J. Bonnie Newman**, “Boyden [Gray] must have worked really closely with them [the Reagan White House] because we had ready to go, hot off the press, a lot of memoranda providing guidance and instructions regarding the various clearance procedures....We had all the necessary forms ready.”²⁸

Colin Powell, the NSC adviser, also had been preparing for the transition in his area. On November 3, five days before the election, Powell forwarded to Duberstein a report outlining what transition preparation his staff had undertaken. According to Powell, the NSC had prepared a volume of briefing materials on the organization, staffing, and budgeting of the NSC staff, a volume on specific issues likely to come before the NSC during the transition and the first six months of the presidency, and a set of papers surveying what Powell described as the “family jewels”: intelligence programs, commitments to foreign governments and “other matters of special sensitivity.”

Powell reported that there had already been contact with the (yet to be elected) Bush camp. At the request of Bob Kimmitt of the vice president’s staff, material had been compiled on the diplomatic meetings held by Reagan, Carter, and Nixon during their first year in office. The material was provided “some weeks ago for informal planning purposes.”²⁹

POST-ELECTION TRANSITION AN ACTIVE PRESIDENT-ELECT

Following the election, George Bush continued to be an active force in shaping his administration, quite different from Ronald Reagan’s comparative indifference to staff and organization matters and Jimmy Carter’s preference in 1976 for letting his fellow Georgians work out differences among themselves. Bush played a direct role in selecting both staff and cabinet members. Both John Sununu’s appointment as chief of staff and Brent Scowcroft’s as NSC adviser were his personal calls. He was also directly involved in determining some of the organizational and decision processes of his presidency: retention of the remaining economic and domestic policy councils of the Reagan second term and a White House staff that had fewer “assistants to the president” at the top. Bush’s staff appointments as well as his own, low-key interpersonal style also dictated a somewhat different organizational culture in this White House: “fewer cowboys” as one participant would later recall.

Bush’s ability to move quickly on key appointments, especially with respect to his White House staff also was of great benefit. As **James Cicconi** recalls, Bush made major appointments “fairly early and it worked pretty well. He had most of the major White House positions either named or the people were considering the offers

²⁶. Correspondence with Chase Untermeyer, December 9, 1998.

²⁷. “The Reagan to Bush Transition: A Miller Center Panel and Colloquium,” in K. Thompson, ed., *Presidential Transitions: The Reagan to Bush Experience*, p. 180.

²⁸. Burke interview with J. Bonnie Newman, September 29, 1998.

²⁹. Memorandum from Colin Powell to Ken Duberstein, “NSC Transition,” November 3, 1988, FG001-04 606669, Reagan Library.

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by the end of November. Then all of us had much of December and at least three weeks in January then to prepare to assume our responsibilities.”³⁰

This “lead time” is an especially crucial component of a successful transition and then presidency. As **Marlin Fitzwater** notes, “The one thing I learned was that a new job at the White House is never going to be what you think it is and you better learn what it is before you start changing things around because you don’t get any chances to fail.”³¹

A FAMILIAR TRANSITION

At his first press conference, the day after the election, Bush unveiled his transition team. As Reagan had done in 1980, Bush shifted his transition leadership. Craig Fuller, his vice presidential chief of staff, and Robert Teeter, his pollster and campaign strategist, were appointed co-directors of the transition. The choice of Fuller and Teeter alleviated some of the tension that had developed in previous transitions--most notably Carter’s--between the campaign staff and those with the kind of political and governmental experience that would likely lead to a White House position. As **David Bates** (who would become secretary to the cabinet) explains: “Fuller had come from the vice president’s office and Teeter had come from the campaign, so you had one guy representing more the governance side and the other guy representing more the campaign. I don’t think the campaign felt left out. I think there was a real nice melding.”³² Almost all of the others selected for top transition positions were longtime associates of Bush in some form or another.

A CABINET OF FRIENDS AND ASSOCIATES

The same pattern of prior association with George Bush also pervaded his cabinet selection. Whereas Carter or Reagan might have had a close relationship with one or, at most, two of those designated for the cabinet, Bush had some association with nearly all of them either from his earlier career or from his vice presidency. That surely created stronger bonds, but it also harbored dangers. In the early months of his presidency, there was an unusual degree of “slip-ups” and “free-lancing” on the part of some cabinet members, and they often compromised the administration’s policy message. Bush’s own penchant for more informal and free-flowing contact with his cabinet members also generated some difficulties.³³ Most cabinet members “exercised the president’s invitation for direct access,” Deputy Chief of Staff **Andrew Card** later recalled, but they “didn’t necessarily respect the chain of command and wouldn’t always report on it, which created tension.”³⁴

Bush also decided to retain three members of the out-going Reagan cabinet: Nicholas Brady at Treasury, Richard Thornburgh at Justice, and Lauro Cavazos at Education. Cavazos proved to be an early casualty of the new administration, and that experience suggests some caution on the part of a new administration in enlisting the services of hold-overs from the out-going administration.

During the transition, Bush and his advisers also decided to continue the structure, organization, and leadership of the two cabinet council system that had been developed in the second Reagan term. One consequence was that Brady and Thornburgh retained leadership of, respectively, the economic and domestic policy councils. Another was that the work of the councils continued to be coordinated by the weaker cabinet

³⁰. White House Interview Program, Interview with James Cicconi, Martha Joynt Kumar, Washington, D.C., November 29, 1999.

³¹. White House Interview Program, Interview with Marlin Fitzwater, Martha Joynt Kumar, Washington, D.C., October 21, 1999.

³². Burke interview with David Bates, October 5, 1998.

³³. For further discussion, see Burke, *Presidential Transitions*, pp. 237-242.

³⁴. Burke interview with Andrew Card Jr., September 17, 1998.

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affairs office in the White House rather than the domestic policy staff. Although the two heads of those operations, David Bates and Roger Porter, were apparently able to work out a cordial working relationship, the experience of the first Reagan term, where the domestic policy staff took the organizational lead, was also one where the councils operated more effectively.³⁵

A STAFF BUSH KNEW AND COULD TRUST

One particular benefit that can accrue from a friendly take-over is the ability to draw not only from longtime career associates who bring a degree of loyalty and trust but also, if the pre-presidential experience is Washington-based (and especially if it includes the vice presidency), a degree of expertise and “inside the beltway” if not prior White House experience. This is no small matter, witness the trials and tribulations of Carter’s Georgia mafia.

A friendly take-over can also bridge some of the separation between campaign and governance. As **Bowman Cutter** notes,

Running a campaign is different than running a government. They have typically no idea about how to run an organization or a government and they spend a lot of time learning...in the Clinton and Carter campaigns the transition was pretty substantial from campaign to government and people didn’t know anything about government.³⁶

For George Bush, the vice presidency and his other political roles enabled him to draw on an unusually rich reservoir of talent. In particular, a number of Bush associates had served in various capacities in the Reagan White House or elsewhere in that administration.

The advantages here are several. First, appointees come with a degree of experience and require less on the job training, especially in preparing for the “fishbowl” experience of serving in the White House. Second, they are likely to have a much better fix on what their new jobs might entail. Third, they are better positioned to develop the contacts with members of the out-going administration during the transition period that will get them up to speed quicker come January 20. **Jim Cicconi**, who served as an assistant to Jim Baker during Reagan’s first term then as deputy chief of staff and staff secretary under George Bush, observes that

I was a hell of a lot better at my job under President Bush because I had worked in a more junior position under President Reagan. I was able to see how Darman [who served as staff secretary during Reagan’s first term] and others, how that job functioned, when it functioned well, when it functioned poorly, how it needed to adapt to the President’s style of work. I saw how it worked; I saw how White Houses work and are structured, how decisions get made. I learned the importance of speaking up and how to affect a decision, how to deal with pressure and stress in the job and balance things in your life at the same time. I was a lot better the second time around than I would have been coming in cold, a lot better.³⁷

But there are also dangers here too. While familiarity may not breed contempt, it may generate a degree of lassitude and a lack of vigor that can handicap a new administration. A friendly take-over especially needs to establish its own record and differentiate itself somewhat from its predecessor.

³⁵. As best as I can reconstruct, the decision to continue with the council arrangement of the second term, especially with the lead role to be taken by cabinet affairs, pre-dated Roger Porter’s early January appointment as assistant to the president for economic and domestic policy.

³⁶. White House Interview Program, Interview with Bowman Cutter, Martha Joynt Kumar, Washington, D.C., November 8, 1999.

³⁷. White House Interview Program, Interview with James Cicconi, Martha Joynt Kumar, Washington, D.C., November 29, 1999.

SOME ORGANIZATIONAL AND PERSONNEL DIFFICULTIES NONETHELESS

Like his predecessor eight years earlier, Bush recognized that the organization of his White House staff, particularly the appointment of a chief of staff, would be an early priority of his transition. John Sununu would later tell reporters that Bush had discussed the possibility of his appointment as early as two weeks before election day.³⁸ In fact, Bush did not immediately announce Sununu's appointment, but waited until November 17.

In the interim, Bush fended off an attempt to resurrect the "troika" of the early Reagan years, which would now cast Craig Fuller as a kind of Jim Baker, with Sununu playing Meese and pollster Robert Teeter taking on some of the Mike Deaver role. To his credit, Bush did not let the matter linger or unduly permit bickering among his top aides. But an effort to bring Teeter on board the staff did continue until early January. The failed negotiations with Teeter would have repercussions later on as communications strategy and the public selling of the Bush presidency came to occupy a lesser position in the staff system--there would be no high level Mike Deavers in this administration. Nor would there be an Ed Meese-figure, with cabinet rank and counselor status, to push a Bush policy agenda at the highest (other than Sununu) levels.

Other organizational decisions made during the transition had important effects. **Andrew Card** recalls that, with respect to White House organization, Bush "gave pretty firm direction." He was very clear about what "decision-making funnels" he wanted reporting to him. Furthermore, he wanted fewer people at the top of the White House organizational pyramid. Yet Bush's choices here would prove consequential for his presidency: the personnel and units affected were those in the area of public and political liaison, intergovernmental relations, and speechwriting. All of them were crucial to the "marketing and selling" of the Bush program, but they were downgraded in the White House hierarchy and placed under the assistant to the president for communications. As Bush staff secretary **James Cicconi** later observed,

we made the major mistake of putting all those things under it [communications] and it was too much, I thought. I thought organizationally it was a very, very difficult management task. There was probably just too much there. I thought those areas functioned probably a whole lot better in the Reagan White House where there were pretty senior people in charge of each of those offices.³⁹

CRAFTING A POLICY AGENDA A BEGINNING OR MISSED OPPORTUNITIES?

As we have seen with the Reagan transition, the transition period is important not just for getting a team in place but also for translating campaign promises into policy priorities and beginning to establish a legislative agenda. In Bush's case, this was especially necessary given a campaign that was comparably devoid of policy specifics.

Early efforts were made in the area of foreign policy, where Bush had clearer commitments and great personal interest. As **Andrew Card** recollects, Bush "was very active with Brent Scowcroft and Jim Baker getting

³⁸. Gerald M. Boyd, "Sununu Answers His Critics: I Have to Be Tough Enough," *New York Times*, November 19, 1988. The day before the election, Bush recorded in his own diary that he discussed announcing Sununu's appointment as chief of staff with Jim Baker, "but that will come later." George Bush, *All the Best: My Life in Letters and Other Writings*, (New York: Scribners, 1999) p. 403. Other reports indicated that on election day, Bush had privately told Craig Fuller--a possible contender for the job--and others in his inner circle that he wanted Sununu for the position. (David Hoffman, "His Political Stature Gave Sununu Edge," *Washington Post*, November 18, 1988).

³⁹. White House Interview Program, Interview with James Cicconi, Martha Joynt Kumar, Washington D.C., November 29, 1999.

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up to speed as secretary of state. Brent Scowcroft is a seasoned national security person and the president had latent interest in those areas. So there was a lot that went on in the foreign policy side.”⁴⁰ Early transition efforts included a plan to forge a new bipartisan consensus on policy toward Central America by gaining congressional assent to a plan for extending humanitarian--but not military aid--to the contras in Nicaragua. A meeting with Mexican President Carlos Salinas was held that began to lay the groundwork for what could become the NAFTA agreement. Bush and his advisers also began to tackle the problem of Latin American debt.

In domestic matters, Richard Darman, the director-designate of OMB, began to work on budget issues, particularly a strategy for dealing with mounting federal deficits.⁴¹ A special group was created during the transition to begin to grapple with some solution to the savings and loan crisis. Yet, at least compared with the Carter and Reagan efforts, other domestic policy matters appeared to stall. In part, this may have been a legacy of president-elect (especially in this case a sitting vice president) taking over from a president of his own party: less of a policy revolution, more of a policy continuation and fine-tuning. But part, too, may have stemmed from a delay in settling on a domestic policy adviser until early January, Bush’s own predilections to favor foreign policy, plus a worsening fiscal picture.

That this was a “friendly take-over” may also have had some effects on policy in another way. As **Andrew Card** later observed, some discussion of issues did take place, but it was largely as a reactive effort to stave off the efforts of incumbent Reagan officials to stay in their positions. Some of them, Card remembers,

started to feed a policy decision as a “red herring” as to why they should not be asked to leave....That generally triggered some kind of policy planning session--if we tell that person he is going to be replaced and he is the champion of X policy is he going to claim we are not interested in X policy? We better do something to show we are in favor of X policy even though we are going to replace this person. Mostly department people; but a little bit at the White House too.⁴²

SUMMARY

By all accounts, the 1988 transition was well-organized and managed. As a “friendly take-over,” Bush and his associates benefitted from close cooperation with the outgoing Reagan administration. This occurred not just during the post-election transition but also before the election. That key aides such as Chase Untermeyer and Boyden Gray could prepare for the tasks ahead, particularly with respect to the hurdles presented by the appointment process, is no small accomplishment. Bush also benefitted from a skilled pool of talent from which to make his picks, especially with respect to the White House staff. The problem that “political outsiders” face in combining personal loyalty and association, on the one hand, with expertise and experience (especially Washington-based) is surely lessened for a sitting vice president. An unusually large number of his aides not only had a long standing personal association with him, but many had also served in the Reagan administration; Bush’s “sponsorship,” “career mentoring,” “strategic placement” (or whatever you want to call it) especially during the Reagan years now paid off.

But friendly take-overs also face challenges. Some of these are the same as other transitions. Have the right persons been picked for key roles such as chief of staff and NSC adviser? (In Bush’s case, one would work out--Scowcroft--while another would prove problematic--Sununu) Is there an effort to turn campaign rhetoric into a

⁴⁰. Burke interview with Andrew Card Jr., September 17, 1998.

⁴¹. Darman’s efforts here are especially noteworthy since he developed a two-step approach: a first year budget that would avoid new tax increases and force Congress to make any difficult cuts, with the issue of raising taxes postponed until the next year. With the “big fix” and the problem of finessing Bush’s “read my lips” election pledge to come later, it was a decision that set the stage for the 1990 budget agreement and would have repercussions on Bush’s chances for re-election in 1992.

⁴². Burke interview with Andrew Card, Jr., September 17, 1998.

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presidential agenda? Has the staff and other parts of the decision-making process been structured to not only take advantage of the president's strengths but also compensate for any weaknesses as a decision maker?

Some challenges may be unique to friendly take-overs, especially when the vice president takes over. How do new presidents begin to differentiate themselves from their predecessors and from an administration in which they have participated? In Bush's case, it may have led to a tendency to downplay the communications functions and media presentation of his presidency, to un-Deaverize it (although Deaver was long gone) and differentiate it from the Reagan years. But with a lean domestic agenda in the first place, effective "marketing and selling" may have been especially required. The "vision thing" may have been irritating to George Bush, but ignoring its call would eventually come at great price, especially four years later when this president and the record of this administration needed to be marketed and resold to the American public.

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ABOUT THE WHITE HOUSE 2001 PROJECT

<http://whitehouse2001.org>

Presidency scholars lead a two-part project designed to provide incoming White House staff members with information on operating key White House offices and to help presidential nominees fill out the tidal wave of forms they face in the appointments process. Funded by The Pew Charitable Trusts, a foundation known for the stature of its programs and the nonpartisan nature of its organization, the White House 2001 Project works with two broad, Pew initiatives: The Transition to Governing Project of the American Enterprise Institute and the Presidential Appointee Initiative of the Brookings Institution. White House 2001 was designed and developed by the board and members of the Presidency Research Group, the worldwide professional organization of scholars focused on the American presidency and a section of the American Political Science Association.

THE WHITE HOUSE INTERVIEW PROGRAM

Unlike corporations both large and small, a White House begins without a record compiled by its previous occupants. The goal of the White House Interview Program is to smooth the path to power by furnishing incoming staff with substantive information about the operation of seven White House offices critical to an effective beginning: Chief of Staff, Staff Secretary, Press Office, Office of Communications, Office of the Counsel to the President, Office of Management and Administration, and the Office of Presidential Personnel. Through interviews with current and former White House staff members from the last six administrations, the White House Interview Program provides new staff with detailed information about how their White House offices function, the organization of their units, and the roles played by the heads of each office.

In addition to this institutional memory, the White House Interview Program provides a support package of important tools previous staff have identified as invaluable. These tools include a “rolodex” of contact information about the people who previously served in their posts with current addresses and phone numbers. The White House Interview Program also provides the first ever detailed organization charts of White House offices approximately every six months through the Carter administration. The scholars associated with the project, researching and writing about the White House staff, are nationally recognized for their work on the presidency. They are: Professors Peri Arnold, MaryAnne Borrelli, John Burke, George Edwards, Karen Hult, Nancy Kassop, John Kessel, Martha Joynt Kumar, Bradley Patterson, James Pfiffner, Terry Sullivan, Kathryn Dunn Tenpas, Charles Walcott, Shirley Anne Warshaw, and Stephen Wayne.

NOMINATION FORMS ONLINE

In order to address the volume of information required from appointees and the problem of the plethora of forms to be filled out by nominees, the *Nomination Forms Online* program provides a software package that nominees can use to complete the myriad of forms required by the White House, the FBI, the US Office of Government Ethics, and, where appropriate, the Senate committee of jurisdiction. The software uses innovative programming techniques so that the software distributes repetitive information across the several forms nominees must complete. The software allows the nominee to store information for future use in completing annual reports. It also makes available a portable file of data in standard formats so the nominee can share information, at his or her discretion, with the White House Office of Presidential Personnel and other agencies. Nomination Forms Online is freeware.

THE WHITE HOUSE 2001 PROJECT REPORT SERIES

available in PDF format (as noted) from: <http://whitehouse2001.org>

GENERAL SERIES

This collection of reports from the White House 2001 Project describe topics of general concern to White House operations. Those in the general series marked with an asterisk (*) are currently only available to the Presidential Transition Team.

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| 1. Opportunities and Hazards – The White House Interview Program | 6. The White House World – Start Up, Organization, and the Pressures of Work Life* |
| 2. Meeting the Freight Train Head On – Planning for the Presidential Transition | 7. A Guide to Inquiry* |
| 3. Lessons from Past Transitions | 8. Analyzing Questionnaires – Executive Forms for Nominees* |
| 4. A Tale of Two Transitions: 1980 and 1988 | |
| 5. The Presidency and the Political Environment* | |

WHITE HOUSE STAFF SERIES

This collection of reports from the White House 2001 Project create an “institutional memory” for the White House Staff. Currently, these reports are available only to the Presidential Transition Team. Look for a release of these reports in the Spring of 2001.

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| 21. Office of the Chief of Staff | 28. Organization Charts for the Office of Presidential Personnel |
| 22. Organization Charts for the Office of Chief of Staff | 29. Office of Counsel to the President |
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