



THE WHITE HOUSE TRANSITION PROJECT
1997-2021



Kinder Institute on
Constitutional Democracy
University of Missouri

Smoothing the Peaceful Transfer of Democratic Power

REPORT 2021—24

OFFICE OF MANAGEMENT AND ADMINISTRATION

Peri E. Arnold, *University of Notre Dame*

Charles E. Walcott, *Virginia Polytechnic Institute and State University*

Bradley H. Patterson, Jr., *National Academy of Public Administration
and the White House Transition Project*

WHO WE ARE & WHAT WE DO

The White House Transition Project. Begun in 1998, the White House Transition Project provides information about individual offices for staff coming into the White House to help streamline the process of transition from one administration to the next. A nonpartisan, nonprofit group, the WHTP brings together political science scholars who study the presidency and White House operations to write analytical pieces on relevant topics about presidential transitions, presidential appointments, and crisis management. Since its creation, it has participated in the 2001, 2005, 2009, 2013, 2017, and now the 2021. WHTP coordinates with government agencies and other non-profit groups, e.g., the US National Archives or the Partnership for Public Service. It also consults with foreign governments and organizations interested in improving governmental transitions, worldwide. See the project at <http://whitehoustransitionproject.org>

The White House Transition Project produces a number of materials, including:

- **WHITE HOUSE OFFICE ESSAYS:** Based on interviews with key personnel who have borne these unique responsibilities, including former White House Chiefs of Staff; Staff Secretaries; Counsels; Press Secretaries, etc. , WHTP produces briefing books for each of the critical White House offices. These briefs compile the best practices suggested by those who have carried out the duties of these office. With the permission of the interviewees, interviews are available on the National Archives website page dedicated to this project:
- ***WHITE HOUSE ORGANIZATION CHARTS.** The charts cover administrations from Ronald Reagan to Barack Obama and help new White House staff understand what to expect when they arrive and how their offices changed over time or stayed the same.
- ***TRANSITION ESSAYS.** These reports cover a number of topics suggested by White House staff, including analyses of the patterns of presidential appointments and the Senate confirmation process, White House and presidential working routine, and the patterns of presidential travel and crisis management. It also maintains ongoing reports on the patterns of interactions with reporters and the press in general as well as White House staffing.
- ***INTERNATIONAL COMPONENT.** The WHTP consults with international governments and groups interested in transitions in their governments. In 2017 in conjunction with the Baker Institute, the WHTP hosted a conference with emerging Latin American leaders and in 2018 cosponsored a government transitions conference with the National Democratic Institute held in November 2018 in Montreal, Canada .

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The Kinder Institute on Constitutional Democracy. A central element of the University of Missouri's main campus in Columbia, Missouri, the Kinder Institute on Constitutional Democracy prepares students for lives of thoughtful and engaged citizenship by equipping them with knowledge of the ideas and events that have shaped our nation's history.

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I. INTRODUCTION

The Office of Management and Administration is the administrative backbone of the White House staff. In the words of former Clinton Assistant for Management and Administration Jodie Torkelson, “It’s an organization that has all the cats and dogs. It’s the non-policy shop. If it’s not policy, it fits in there.”¹ The White House community of approximately 6000 people, including volunteers, is diverse and fluid.² Careful and effective administration is necessary to knit it together. Because it is responsible for allocating critical resources to all the other White House offices, the Office of Management and Administration must be fully prepared to function effectively from the very outset of a presidential term.

The importance of the work of the Office of Management and Administration can be quickly seen from a list of some of its major duties:

- a) personnel administration, including staff salaries and allocation of staff positions
- b) managing the White House and Executive Office budgets
- c) supervision of the White House Military Office and the Security Office
- d) allocation of office space in the White House and Executive Office Buildings

¹ White House Interview Program, Interview with Jodie Torkelson, Martha Joynt Kumar, Washington, D.C., October 19, 1999.

² See Bradley H. Patterson, Jr., *The White House Staff: Inside the West Wing and Beyond* (Washington, D.C.: Brookings Institution, 2000).ai

- e) allocation of White House mess privileges, parking space, and passes, etc.
- f) supervision of such staff operations as the Motor Pool, the Travel Office, the telephone operators, Visitors Office, and the Intern Program
- g) liaison with and source of guidance for the Secret Service
- h) oversight of the Office of Administration, which manages the White House computer systems and the financial accounting function.

Moreover, as Christopher Hicks, Management and Administration Assistant under President Reagan has observed, the Assistant for Management and Administration is the closest thing to an inspector general one can find in the White House.³ As such, the Management and Administration Assistant must work closely with the top officials in the White House, especially the Chief of Staff and the Counsel.

Because the tasks of allocating scarce and valuable resources and overseeing sensitive activities are potentially controversial, the head of Management and Administration must be politically experienced and sophisticated, adept at spotting possible trouble and mediating controversy. At the same time, however, because the essential tasks of the Office of Management and Administration are administrative, it is equally important that the office be led by a talented, experienced manager. This is especially true because many key decisions (e.g., salaries, staff sizes) must be made at the beginning of an administration. Once made, they are difficult to revisit.

The Executive Office of the President, and the White House Office within it, are organizationally complex and multi-purposed. The offices therein will serve the President optimally only if their everyday administrative operations, such as accounting, housekeeping, information technology, payroll, personnel administration, security and travel are managed efficiently, responsibly, and, not least, quietly. Jodie Torkelson spoke to the heart of the matter describing her conception of the job: “If I was doing a good job, [the President] shouldn’t even have to think about it”⁴

If further evidence of the importance of this office is necessary, one must only recall that most of the conspicuous errors of the early Clinton administration occurred in areas now under the oversight of Management and Administration, including the firings of Travel Office employees, the misuse of FBI files, and the inappropriate use of a military helicopter. Good management not only makes the machine run smoothly, it is crucial for establishing the administration’s reputation for competence and integrity in the minds of the Washington community and the public.

II. BACKGROUND AND OVERVIEW OF THE OFFICE

The Office of Management and Administration is a relatively recent addition to the White House staff. Prior to the Carter administration, most of the functions associated with this office had been handled by an assistant whose principal responsibilities lay elsewhere. In the Nixon and Ford administrations, for instance, this work fell mostly to the Staff Secretary. But as the White House grew more complex, loading this work on top of the other functions of the staff secretary

³ White House Interview Program, Interview with Christopher Hicks, Martha Joynt Kumar, Washington, D.C., November 18, 1999.

⁴ Jodie Torkelson interview.

created what Alex Butterfield once called an “administrative nightmare.”⁵ At the outset of the Carter administration, specialization in management was introduced. Two assistants shared responsibility for White House and Executive Office administrative supervision, Richard Harden and Hugh Carter, with the latter being mainly “the internal White House person.”⁶

The Office of Management and Administration has roots dating back to President Jimmy Carter’s 1977 Reorganization Plan No 1, and its accompanying Executive Order No. 12028. Centralizing into one unit the administrative and overhead operations for offices of the Executive Office of the President, the Reorganization Plan created the Office of Administration, under Harden. Into it moved administrative personnel from Executive Office of the President units and some administrative staff from the White House operations office. However, for the time being the White House operations office, under Hugh Carter, remained independent of the Office of Administration. The title of Office of Management and Administration was first used for the unit beginning in the Bush Administration.

While there was a subtext to the President’s action — reducing the number of White House personnel by shifting some to the Executive Office of the President — the plan’s overt, and more important, purpose was to bring increased efficiency and rationality to administration in the President’s organizational sphere. Executive Order No. 12028 stated: “The primary responsibility for performing all administrative support and service functions of units within the Executive Office of the President shall be transferred and reassigned to the Office of Administration.”

Over the course of the past three administrations, the basic structure and responsibilities of the Office of Management and Administration have become more or less institutionalized, in the sense that the basic elements and responsibilities of the office, while regrouped from time to time, have persisted. Models have been created that seem to work well. Nonetheless, in recent presidential administrations there are notable examples of both effective and ineffective uses of the presidency’s centralized management apparatus. Using oral history interviews with former heads of the White House Office of Management and Administration, this memo aims to expose those planning for a new administration to views and lessons drawn from their predecessors’ experiences.

III. WHY TRANSITION PLANNING SHOULD NOT OVERLOOK MANAGEMENT AND ADMINISTRATION

As with all the White House units, the Office of Management and Administration’s structure and functions are subject to presidential discretion. the Office of Management and Administration’s functions, and the qualifications and responsibilities of the presidential assistant who heads it, are defined by the incoming administration on the basis of the President’s perceived needs. However, incoming presidents, and their transition teams, are unlikely to have a full sense of this office’s importance until they have experienced its operations. Therein is a “Catch 22” of presidential transitions. The new administration is best served by recovering information about how this office has served past administrations. This memo’s aim is to help in that task of information recovery.

Christopher Hicks, who served in the Reagan administration, said:

⁵ Background interview.

⁶ White House Interview Program, Interview with Richard Harden, Martha Joynt Kumar, Washington, D.C., January 20, 2000.

You can't actually get... things done without some of this infrastructure in the White House. You have to make sure that the computers work. You have to make sure that people have parking places; that once the President decides to appoint a cabinet secretary that the document actually gets from here to there to make it happen.⁷

The Office of Management and Administration's span of responsibility and organization have changed over time, as we shall see below. Initially, we shall simply note that the office now is responsible for management of White House operations, the Office of Administration, the White House Military Office, which is the largest unit in the White House. The activities overseen by this office are wildly diverse. They range from personnel administration through information technology to building maintenance and transportation for the President, the staff and the White House press corps. Additionally, while the office is not a policy shop, its responsibilities include several very delicate concerns. Its work with budgets, salaries, space and transportation impact the status concerns of White House staff. Its management of the White House budget brings it into the center of the competing demands for resources.

Why should responsibilities so mundane as these concern the transition planners to the most powerful office in the world? First, as Christopher Hicks observed in the quotation above, the Office of Management and Administration provides the administrative services and organizational connections through which the other White House and Executive Office of the President units function efficiently. A malfunctioning Office of Management and Administration can cause series of quite undesirable problems for an administration, while a well functioning Office of Management and Administration operates without calling attention to itself; so to speak, the best housekeeping is invisible. Thus, if for no other reason, the Office of Management and Administration should be targeted in the transition because to not create an effective operation there at the beginning, led by an appropriately qualified assistant for management and administration, is to risk embarrassment to the new President as well as administrative inefficiency.

Former occupants of the role testify to the importance of this lesson. Jodie Torkelson, assistant for organization and management after 1994, warned that the office is easily overlooked in the transition. She observed that in the 1992-93 transition, the Office of Management and Administration was not "on the radar screen" and was considered "a technical organization, 'not necessary to cover.'"⁸ John Rogers, director of administration in the Reagan administration observed that understanding the way the Office of Management and Administration worked in the past would have probably avoided some problems in the Office of Management and Administration during 1993, particularly the Travel Office firings. He said: "...all they needed to do was have someone call me and I could have told them exactly what not to do and what was going to get them in to trouble."⁹

For the transition team to understand the Office of Management and Administration's critical role is to recognize the high priority of appointing an Assistant for Organization and Management who has the experiences and qualifications that are appropriate for this complicated office. That person needs the knowledge to supervise the office's administrative overhead responsibilities for the White House and Executive Office of the President. He or she must have the political sophistication to understand the ways the office's work impacts status considerations

⁷ White House Interview Program, Interview with Christopher Hicks, Martha Joynt Kumar, Washington, D.C., June 17, 1999.

⁸ Jodie Torkelson interview.

⁹ White House Interview Program, Interview with John Rogers, Martha Joynt Kumar, Washington, D.C., November 10, 1999.

within the White House orbit. Additionally, the assistant must have experience with Congress to enable him or her to deal with congressional requests for information about specific White House activities. In the Clinton years, for example, the director of Management and Administration testified before Congress on issues relating to the firings of employees in the Travel Office, the handling of FBI files, and the loss of email messages belonging to the Vice President. The following are some guidelines for orienting the Office of Management and Administration within the new administration and determining qualifications for the assistant for organization and management.

- i) The Assistant for Organization and Management should be a person with Washington experience. This person should have executive branch experience and knowledge of congressional operations and oversight. More specifically, the Assistant for Management and Administration must understand White House and Executive Office of the President operations and the context in which staff work. The Office of Management and Administration leadership must understand how the White House budget is represented to Congress. The Office of Administration director testifies annually before Congress on the budget, and the Office of Management and Administration staff should be aware of the congressional budget process. The director of the Office of Management and Administration can be called to testify to Congress on White House administrative issues, such as noted in the earlier discussion of the experience in the Clinton years.
- j) New administrations must distinguish between long-term White House employees and those positions that are properly political appointments of the new administration. While sometimes referred to as “career,” these professional White House employees do not have civil service status or tenure. However, they are traditionally invited to stay from administration to administration. The long-term employees are technically subject to political appointment but have served in generally non-policy sensitive roles over several administrations. Most of these employees work under the umbrella of the Office of Management and Administration. In their interviews, former the Office of Management and Administration directors testify to the efficiency and loyalty of these continuing employees. The Assistant for Organization and Management must represent the importance of these continuing employees to the new administration.
- k) Many of the Office of Management and Administration’s responsibilities require that the office’s supervisory staff be knowledgeable about matters such as personnel and compensation management, purchasing, space allocation, and information systems. Political experience alone is an insufficient qualification for the Office of Management and Administration. New administrations must understand that some appointive positions require management expertise and experience rather than, or in addition to, political expertise and sensitivity.
- l) Routine administrative activities of the White House and Executive Office of the President should not be newsworthy and only will become so when routines fail. The administrative routines that the Office of Management and Administration manages should be understood to protect the administration. Thus, the Office of Management and Administration’s routines have been passed down from one White House to another because they have been found to work well and should be incorporated by the new administration.

IV. THE OFFICE AT WORK

John Rogers, who worked both in the Ford and Reagan administrations, observed that “... certain issues face every single administration... in the modern era.”¹⁰ Guided by Rogers’s insight, this essay will examine the patterns evident in the operations of Management and Administration over four presidencies beginning with President Carter and going through President Clinton.

Continuity and Change in the Office of Management and Administration’s Structure and Responsibilities

The Office of Management and Administration has tended core White House administrative operations across several administrations. However, the supervisory span of the role has changed over time, with several administrative units coming into, or leaving, the unit’s sphere of responsibility. In addition, there are occasional pressures for the assistant for management and administration to be the supervisory repository for other administrative or operational units that become troublesome. Thus, the history of the office offers alternative models for grouping administrative functions. None is necessarily the single, best way, but experience has provided certain lessons.

President Carter established the Office of Administration to provide common administrative service to Executive Office of the President agencies, including the White House Office. The White House Office also had an administrative function to handle unique administrative responsibilities. Hugh Carter oversaw those. The Office of Administration, headed by Richard Harden, included financial, information system and personnel services for the Executive Office of the President. The latter unit oversaw White House operations, including the President’s military office and the White House visitors’ office.

President Reagan’s director of administration, John Rogers, recalled that “there was a problem in [White House and Executive Office of the President units] being separated because there was enormous fighting going on between... the White House Administration Office versus the Office of Administration.”¹¹ Consequently, the Reagan administration coordinated White House operations with the Office of Administration, including personnel management, correspondence, and special presidential messages, along with financial management, automated systems development, and supervision of the White House library. Rogers himself held the title of Assistant to the President. The consensus among Rogers and his successors is that the unified office is a more effective structure than Carter’s separate offices.

...the organizational vehicle made sense, the concept was logical... by virtue of occupying this position [the Office of Management and Administration] could direct everything from the White House itself. What the White House needed, any time it needed it, it would get from it. And, in addition to that, it was an extra vehicle to carry some of the burden.¹²

However, while functions were merged, Rogers notes that it was important to maintain formal organizational independence for some White House operations distinct from the Executive Office of the President units. The White House authorization act shields White House offices from freedom of information act requests. Some Executive Office of the President units are not similarly shielded. Therefore, it is necessary to maintain the White House administrative

¹⁰ John Rogers interview.

¹¹ John Rogers interview and Richard Harden interview.

¹² John Rogers interview.

operation as a distinct element, albeit under the director of what is now the Office of Management and Administration.¹³

Under President Bush, the Office of Management and Administration was established, patterned closely on President Reagan's structure. J. Bonnie Newman, the head of the office, was provided the title of assistant to the President for management and administration. The office expanded to incorporate supervision of the Military Office, which had been under deputy Michael Deaver in the Reagan administration. This became a distinct element within the Office of Management and Administration as, later, did the White House Medical Unit.

Also in the Office of Management and Administration was the Office of White House Operations, serving White House administrative functions including the Personnel, Visitors, and Travel Offices, the Official Photographer, the White House telephone operators, general administrative and financial management. Its director, Rose Zamaria, also "handled things like allocating the office space in the West Wing," as well as parking privileges and the distribution of White House trinkets.

And she was 'tough as a boot'. She used to drive people crazy. What she did was she represented the President well. She knew him well and represented him well. She was very, very good. That's a job where a personal relationship and really understanding the man you're working for or the woman you're working for become very important.¹⁴

Presidential correspondence and messages were transferred out to the Office of the Staff Secretary. This basic structure was maintained to the end of the Bush administration.

The Clinton administration essentially maintained the structural arrangements inherited from President Bush. The assistant to the President for management and administration supervised three distinct units: (1) the Office of Administration (general management functions formerly simply grouped with the Office of Management and Administration in the formal organization chart), (2) the Office of White House Operations (President Bush's Office of White House Operations), (3) the Military Office, including the Medical Unit.

After the Clinton administration's political problems associated with the Office of Management and Administration in 1993 and 1994, the office returned to its normal invisibility. In fall 1994 Jodie Torkelson became head of the office and assistant for management and administration.

Torkelson brought to her job prior experiences that seem appropriate to the demands posed by this office. She had extensive Washington political and legislative background, working in Congress for Leon Panetta. Afterward, she directed a Lutheran church-related foundation. When Panetta joined the Clinton administration as director of the Office of Management and Budget (OMB), she returned to Washington as OMB's associate director of administration. She came to the White House as assistant for management and administration when Panetta became President Clinton's Chief of Staff.

Torkelson noted that there were pressures to add to the office's responsibilities once she had regularized its operations. She relates that there was a proposal to move the White House correspondence office under the Office of Management and Administration, but she blocked the effort.¹⁵ Her view was that the job of the presidential assistant for management and

¹³ John Rogers interview.

¹⁴ White House Interview Program, Interview with Timothy McBride, Martha Joynt Kumar, Washington, D.C., August 16, 1999.

¹⁵ Jodie Torkelson interview.

administration is sufficiently challenging, without extending the office's present range of responsibilities.

*THE RESPONSIBILITIES OF THE ASSISTANT FOR
MANAGEMENT AND ADMINISTRATION*

At its best, the Office of Management and Administration operates similarly in different presidencies. It is not one of the elements of the White House that should be bent to fit the operating style of a particular President. The Office of Management and Administration appears idiosyncratic, as in case of the Travel Office. Thus, there are patterns of responsibilities present in the Office of Management and Administration that should continue into the next administration.

Former Assistants for Management and Administration report that White House operations constitute the most complicated and time consuming of their responsibilities. White House Operations includes responsibilities that are crucial to the smooth operations of the President's office while also entailing delicate issues of fairness and status. These entail salaries, staff positions, office space, White House mess privileges, allocation of White House passes, parking spaces and assignment of military aircraft for official travel.

Referring to the utility of a united White House operations office and the Executive Office of the President Office of Administration under the Office of Management and Administration, John Rogers described the flexibility in assigning personnel that this made possible:

What the White House needed, any time it needed it, it would get from [the Office of Administration] and, in addition to that, it was an extra vehicle to carry some of the burden. When you're in the White House you're always playing a shell game with the slots because you're either trying to make a statement about the number of White House staff.¹⁶

Timothy McBride described his duties as assistant for Management and Administration in the Bush administration. His role was to assure "the smooth running of the White House itself, the day-to-day operation of the physical structure, the facilities that support the staff including information or IT services, the personnel functions, the care and feeding of the staff..."¹⁷

One can see another aspect of the Office of Management and Administration's job through Jodie Torkelson's description of taking over a troubled Office of Management and Administration when there were no clear guidelines in place covering salary ranges or the allocation of various White House privileges.¹⁸

Torkelson described her task as bringing order to the chaos she found, regarding salary inequities, office budgets, the distribution of White House privileges, and staff support. Realizing the lack of order and rules in the Office of Management and Administration, she said: "then I started asking, 'Don't you have a policy on mess and carpool privileges or who has blue badges to get in the West Wing?' No. So we started really at the basics. We put together a staff manual which came out in 1995..."¹⁹

¹⁶ John Rogers interview.

¹⁷ Timothy McBride interview.

¹⁸ Jodie Torkelson interview.

¹⁹ Jodie Torkelson interview.

THE SPECIFIC TASKS OF THE OFFICE OF MANAGEMENT AND ADMINISTRATION

Personnel administration, including salaries and the allocation of positions.

The personnel responsibility of the Office of Management and Administration is a large part of the job. In addition to roughly 400 staff in the White House Office, the office is responsible for overseeing perhaps “several thousand people if you include interns, volunteers, full-time slots, detailees, and all that kind of stuff.”²⁰ Decisions on how many of the various kinds of people the White House will have, and how they will be allocated among various offices and tasks must be made early. The best guide at the outset, according to Christopher Hicks, is simply to look at the patterns established by the previous administration or administrations.²¹

a. Whom to Hire?

For some, but definitely not all of the White House universe, the Management and Administration Assistant, backed up by accountants in Office of Administration, controls numbers of staff and their payroll. Former Bush Assistant Christopher Hicks was firm:

What I tried to do in the Reagan/Bush transition was: ‘Let’s clear the decks. Let’s start from scratch. We have these many appropriated positions. This many are taken up by the career people. So now we have these many left. What offices, [Mr.] Chief of Staff and [Mr.] President, do you want to have? You have to have a counsel; you have to have a Chief of Staff; you have to have a press office. What are the [other] ones you have to have? Public Liaison? What are the ones that the last administration had that you might not need? ... Who are the people you want to head...these offices?’ Then give it to somebody like me and say ‘Figure out how many bodies I get and then make a recommendation to the Chief of Staff.’ He can talk about it with the President if he wants and then have each of the offices argue it out with the Chief of Staff and the President. But it shouldn’t be a free-for-all where everybody is walking in to the President and saying ‘My office is the most important office and therefore I need fifty people.’²²

As the months roll on, the Assistant’s watchfulness must never be relaxed:

The offices within the White House Office...can’t get away with too much of padding their own budget with people. Everybody else can. So the main role is to watch the other people, the other agencies... the way you watch them is not only by keeping your eyes open, but [watching] passes, parking requests, Christmas card lists and that kind of stuff. The other things you have to watch in that role, though, are the agencies that you don’t have any control over, no budget authority or nothing, that aren’t part of the office of the President but operate on the eighteen acres of the White House complex such as the Secret Service, Park Service, GSA and the residence staff.²³

b. Whom to Keep?

Former Reagan Management and Administration Assistant John Rogers remembered: “When we came in, there were some people who wanted to dismiss every single person who was on the White House payroll. Now the President certainly has the authority...to do so, but there had been a time-honored group of career people within the White House who basically live from President to President, serve the presidency, were proud of that association, but kept things working.. The White House telephone operators are a perfect example of that. And yet there were some in our transition who said, ‘Let’s get rid of the White House operators.’ I fought those

²⁰ Christopher Hicks interview, November 18, 1999.

²¹ Christopher Hicks interview, November 18, 1999.

²² Christopher Hicks interview, November 18, 1999.

²³ Christopher Hicks interview, November 18, 1999.

actions and the President agreed.... We were successful in preventing inexperienced people from the campaign from coming over to the White House and getting jobs that might embarrass the White House or the President.”²⁴

President Bush Assistant Bonnie Newman added: “They were consummate professionals; they weren’t partisan people. They weren’t Democrats or Republicans... But those are the folks that keep things going and [who], if you’re willing to listen to them, can give you very wide and sage counsel on how things need to be done. They’ll spot the hotshots a mile away and they’ll be able to tell you the first week or so who you need to keep an eye on and who maybe is pumping too much adrenaline. You have to be willing to listen to them. You can’t be so concerned about who carries or who doesn’t carry a certain title.”²⁵

But former Clinton Management and Administration Assistant Jodie Torkelson sounded a cautionary -- even dissenting -- note about the continuing professional staff:

I’m not sure that I would ... have more people around who had been in previous administrations. I think it is a very difficult thing for them... The White House Office is such a personal office to the President...people who have been there for a number of years -- they develop loyalties and friendships with the people they worked with previously...At the very beginning they see things being done slightly different than they were in the previous administration and it’s a little bit of ‘They’re changing what we worked on; they don’t appreciate us.’ I think every administration has to sort of set its own mark. It’s harder to do when you have a lot of people around who are saying ‘That was never done this way before.’ In some ways I think it would be much better if there was a written process of procedures and record.²⁶

President Bush Assistant Hicks emphasized: “The thing I think the Clinton administration made the mistake in doing was coming in and saying ‘Well, we’re cutting the staff.’ That’s stupid... You don’t want to shoot yourself in the foot by coming in and making some political gesture and getting rid of employees that you really need.”²⁷ Carter had made the same promise. “What happened,” his Assistant recalled, “they ‘cut’ the staff and then went out to the departments and just refilled it with people assigned from the departments.”²⁸

c. Whom to Borrow?

Controlling the use of detailees is an issue bedeviling every Management and Administration Assistant, as Hicks recalled: “It’s real easy to abuse detailees. The Chief of Staff is going to call up the secretary of whatever and say ‘Can you detail somebody over here to help us out on this?’ What’s the secretary going to say? ‘Of course.’ And it’s just going to accumulate....The budget says the White House Office is 200 people when in fact there may be...600 people working.”²⁹ The figure for the White House Office for FY 2001 budget is 400 but detailees remain a feature of White House operations.

The law now requires that the White House annually send a written notification to the Congress listing the number (and the total compensation) of employees and consultants who, in the previous fiscal year, worked in the White House offices, and the number of detailees who

²⁴ John Rogers interview.

²⁵ White House Interview Program, Interview with J. Bonnie Newman, Martha Joynt Kumar, Washington, D.C., January 26, 2000.

²⁶ Jodie Torkelson interview.

²⁷ Christopher Hicks interview, November 18, 1999.

²⁸ Richard Harden interview.

²⁹ Christopher Hicks interview, November 18, 1999.

worked there for more than thirty days.³⁰ A separate statute requires an annual report to Congress giving the names, titles and salaries of all White House employees and detailees.³¹ It is the Management and Administration Assistant who signs the transmittal letters for each of these reports. Does even the Management and Administration Assistant really know how many people work at the White House? Not by counting offices; not even by counting telephones. Concluded President Bush's Management and Administration Assistant: "You know the best way to find out how many people are there is, about this time of year, you send out a memo to every office saying 'How many invitations do you need to the White House Christmas Party?' Just all sorts of people start crawling out of the woodwork."³²

Christopher Hicks recommended that, for reasons of budgetary honesty and fairness across government departments, the use of detailees be minimal.

When I was in the Bush transition what I tried to convince Sununu and Andy Card and others like that to do is, no detailees, start out with no detailees. Then as... the administration goes on, if you really don't have a slot for someone and you can justify it, you wouldn't be embarrassed by going up and testifying to the appropriations (committees) saying this is why we supplemented our budget by bringing over this person from wherever. But detailees can be a real abuse...

And it's just going to accumulate. So you can say, well, you can look it up in the White House budget; the budget says the White House Office is 200 people when in fact there may be, as you say, 600 people working.³³

d. Salaries

A Reagan Management and Administration Assistant remembered: "There was a problem in the Reagan Administration where each office would determine what their secretaries were getting paid....So you would have some secretaries that were making \$20,000 and some were doing the same job in a different office making \$35,000. I tried to reconcile all that. . ."³⁴

One of the first things Torkelson noticed when she arrived to head the Office of Management and Administration was inequities in staff salaries. Jodie Torkelson recalled that when she joined the Clinton White House, "The salary range for an Assistant to the President was supposed to be \$110,000 to \$125,000; every Assistant came in at \$125,000. Deputy Assistants... were between...\$80,000 and \$110,000; the majority were at \$110,000.... Then we had these Special Assistants to the President which were all over the place, and they ranged anywhere from \$45,000 to --- the title came to mean absolutely anything -- it was used so widely... It was ridiculous."³⁵ In part, this was caused because of an earlier practice of bringing people in too close to the top of their salary range, giving them the same salaries as their more experienced predecessors. Another problem was the use of the title "special assistant to the President" to mean such a wide variety of things that there were 85-90 "special assistants," with widely varying duties and salaries. Torkelson tried to regularize the use of titles and the assignment of salaries, as well as the size of the various White House offices:

But you set the salary ranges. I really stuck to my guns to make sure that people were brought in within those ranges. I also gave offices budgets... they had to live within their budget. If they tried to bring someone in at a slightly higher rate, as long as it fit within the salary range that was fine,

³⁰ Public Law 95-570, Section 113

³¹ Public Law 103-270, Section 6.

³² Christopher Hicks interview, November 18, 1999.

³³ Christopher Hicks interview, November 18, 1999.

³⁴ Christopher Hicks interview, November 18, 1999.

³⁵ Jodie Torkelson interview.

but then it meant they might have to do away with one person or somebody else would have a lot less salary than they'd like to offer in one of the lower-end positions.³⁶

With respect to resource-allocation she also stressed the element of fairness:

I met with everybody and that was the biggest thing. No one believed me when I first said 'It's going to be fair; you'll have your budget; you can know what everybody else's budget is; I don't care; we share information.' Everybody is very suspicious because that's not how it had been."³⁷

Budgeting the Total White House

In the management and administration department of any large organization, it is the budget which is a principal control mechanism. But for the White House? "Remember," counseled President Bush's Management and Administration Assistant Bonnie Newman, "there are several budgets involved. You've got the White House [Office] budget [separately including the Residence], the Executive Office of the President budget [i.e. the Vice President, office of policy development, National Security Council and Office of Administration]. Then the [very large part of the] Department of Defense budget -- as far as it involves the White House Military Office... a significant support segment for the White House."³⁸ For most of those offices that Newman mentioned, the Management and Administration Assistant is the control point.

In her summary, however, Bonnie Newman did not mention the parts of the budgets of the Department of State related to White House international functions, the Secret Service part of the Department of the Treasury, the National Park Service White House Liaison part of the Department of the Interior, the White House Service Delivery Team part of the General Services Administration, the White House Postal Unit part of the Postal Service, the presidential support part of the National Archives and Records Administration, and the President's Commission on White House Fellows. Using the best available research, and making conservative estimates, Bradley Patterson has added up the costs of all of these units and has compiled what may be the total White House budget for FY 2001; it is \$730,500,000.³⁹ Such a figure appears in *The White House Staff: Inside the West Wing and Beyond* but not in any public document and Patterson suspects nobody has yet put it together in such a complete form, even in the White House.

But it should be so assembled. The accurate and complete budget of any institution is a vital control lever for whoever is the institution's principal assistant for management and administration.

Supervision of the White House Military Office

A key responsibility of the Office of Management and Administration under President Bush and President Clinton has been the management of the Military Office. The White House Military Office, with its 2200 professionals, is the largest unit in the White House, and the White House Communications Agency is the largest segment of the military group. Wherever the President may be -- in Moscow or Beijing, in the air, in a speedboat, or in a motorcade, on a raft or on a horse -- the 900 electronics wizards of White House Communications Agency and their 46,000 pieces of state-of-the-art-equipment keep their commander-in-chief tied in to his panoply of

³⁶ Jodie Torkelson interview.

³⁷ Jodie Torkelson interview.

³⁸ Bonnie Newman interview.

³⁹. See *The White House Staff: Inside the West Wing and Beyond*, pp. 342-345.

diplomatic, intelligence and military command centers, and connect him to any foreign chief of state with whom he wants to converse (something modern presidents do hundreds of times).

One illustrative incident was recalled by Bonnie Newman:

I remember when we were in Aspen...Both President Bush and Margaret Thatcher were speaking at the anniversary of the Aspen Institute. Our communications were set up in a leased Winnebago. All of a sudden, Saddam Hussein goes into Kuwait, and the roof comes off. We have two heads of state, both of whom need to be communicating with their respective governments and other heads of state, and we're managing it out of a Winnebago parked halfway up a mountain. It was wild.⁴⁰

The White House Communications Agency also runs the radio net and paging system for the staff, provides the audiovisual equipment for the President's public appearances and makes audio and video recordings of all White House events.

In addition the Military Office operates two important Navy facilities: Camp David (up in the Maryland mountains) and the White House Mess (down in the West Wing basement). Its five Military Aides take turns carrying the "football" with its vital war-codes, its cohort of military/social aides escort VIP visitors into receiving lines; its medical staff treats the first family; its pilots fly *Air Force One*, *Marine One* and its sister helicopters; and its Army chauffeurs drive the radio-equipped White House limousines. Its Ceremonies Officer produces the strolling strings for waltzes in the White House foyer or the herald trumpets to sound arrival clarions from the South Balcony, while the Office's contingency planners figure out where the President is to go if a nuclear missile is heading toward Washington.

Thus, even before starting to worry about general management, the Assistant for Management and Administration's hands are full with direct operational responsibilities. Those responsibilities can add up to headaches. Former Bush Management and Administration Assistant Timothy McBride recalled the kinds of choices that have to be made:

We ran the motor pool.... It doesn't seem like much, but you've got vehicles that have to transport staff to the Hill, to Andrews Air Force Base. And whenever you have folks who are very important and think they need a car available to them whenever they want one, you're dealing with egos. But you're dealing with a limited number of resources.... A lot of it centered around... maintaining an appropriate level of usage of military assets and government assets which support the President and his staff. Unless you've got somebody who is willing to say no, is willing to appreciate the opportunities for abuse, there will be abuse... It is heady. And without some safeguards, abuse will occur.⁴¹

The Military Office also includes such military assets as *Air Force One* and the helicopter fleet, and the "continuity in government" programs that plan for emergencies. The office is staffed by career military, with the possible exception of the Director. The Director of the Military Office reports to the Assistant for Management and Administration. As Timothy McBride put it, the most successful Directors of the Military Office "probably had an appreciation for the potential abuse of the assets and the resources."⁴² If such problems are not caught at that level, they become issues for the Office of Management and Administration.⁴³

Besides the operation of *Air Force One* and *Two*, the Air Force maintains the 89th Air Force Wing, a fleet of planes which can be used by senior White House staff and others when they undertake vital presidential missions and when other flight options are unavailable or

⁴⁰ Bonnie Newman interview.

⁴¹ Timothy McBride interview.

⁴² Timothy McBride interview.

⁴³ Timothy McBride interview.

inappropriate. And when is this? And who decides? President Clinton's Management Assistant Jodie Torkelson made it clear: "You have a lot of people who come to work in places like the White House who are so bright -- but they never really manage much; they can't say "No!" to anybody over anything. So the Cabinet Secretary would rubber-stamp them and send them along to the National Security Council and the National Security Council would rubber-stamp them and send them to me and then I would say 'Ugh!'"

[Interviewer]: Would several of them get appealed?

[Torkelson]: Every week -- all of them get appealed.

[Interviewer]: But you got upheld.

[Torkelson]: Yeah.⁴⁴

Another set of considerations arises out of the Military Office's job of receiving promotion recommendations from the armed services, reviewing them, and forwarding them through the hierarchy to the President for approval. The Office of Management and Administration may pay little attention to these under most circumstances. Jodie Torkelson, for instance, left virtually all military reviews and approvals to the Military Office, electing to review only the appointments of

the military aides, the little football guys, and the social aides and the top tier of the White House Military Office, who got to be the pilot of *Air Force One* and who ran *Marine One*; the people that the President would actually come into contact with, his pilot, his stewards, those were the folks I worried about.⁴⁵

In contrast, Timothy McBride reported reviewing the promotion recommendations for instances where there was a potential for embarrassment, such as connection to the Tailhook episode.

It's easy for the military office to say these guys are our pals; they're good guys...But somebody has to be worried about the political implication for the President. That's the sort of thing that I was responsible for.⁴⁶

The Military Office is also in charge of "continuity in government" programs including contingency plans for responding to dire emergencies involving the President. The Assistant for Management and Administration is briefed on these programs, and, as in Jodie Torkelson's case, responsible for seeing to it that they are given due importance. This included not only discussion of the programs at high levels, but necessary briefings and exercises.⁴⁷

A final issue concerning the Military Office represents, ironically, the downside of competence and loyalty. As Torkelson put it,

The White House Military Office is like every office in the White House: the President wants; oh my gosh, somebody says the President wants and they all just fall over themselves trying to help. It's good on the one hand, but on the other hand, you can get your boss in a lot of trouble if you don't pay attention to what is legal or whatever just because you're trying to be helpful...If the President walks around Camp David and says, "I'd like to have a huge golf course here," before you could blink an eye they'd probably knock all the trees down and ruin the entire forest to build it because he said he wanted one.⁴⁸

⁴⁴ Jodie Torkelson interview with Brad Patterson, 11-12

⁴⁵ Jodie Torkelson interview.

⁴⁶ Timothy McBride interview.

⁴⁷ Jodie Torkelson interview.

⁴⁸ Jodie Torkelson interview.

In this regard, the Office of Management and Administration must act as a kind of “reality check” on the Military Office and indeed the White House as a whole.⁴⁹

Allocation of office space

Office space, especially in the West Wing of the White House, is at a premium and is apt to be avidly sought and hotly contested. Well before Inauguration, one especially prescient Management and Administration Assistant drew up a color-coded map of the White House/Eisenhower Executive Office Building floor areas. She was aiming at efficiency as the criterion -- what White House offices should be located next to what others? Observed another, similarly: “Why do the speechwriters have this office space? It’s really impractical to have the speechwriters in this best...space. These are people who need to be up near the library.”⁵⁰ Efficiency, however, tends to be overwhelmed by tradition: the Chief of Staff, the counsel, the press secretary, the national security adviser, the domestic, the economic, the speechwriting, the scheduling groups have occupied certain West Wing quarters for years; the incoming denizens *a priori* stake their claims on them. In one less orderly White House, staffers ran in early and commandeered favorite locations. Another former Management and Administration Assistant discovered, only too late, that the National Security Council folks, over one weekend, ducked into a part of their EOB office space that had 20-foot-high ceilings, and “condominiumized [it] with little spiral staircases, so they were able to put twice as many people in the space they had. Then they would just call up Defense or State and Coast Guard and have all these people in there.”⁵¹

More commonly, in the absence of twenty-foot ceilings, White House units will battle for space. Especially at the outset of an administration, along with deciding how many personnel slots each unit will receive, allocating space to those units is a basic issue for the Office of Management and Administration. John Rogers, who was on the Reagan transition team, then took over White House administration, described these as “the basic block and tackling structure issue.”⁵² He also noted the tension that can accompany such decisions:

Well, it can be intense and things can also be very emotional. People had a tendency to be emotional. Little things in life become very serious to them. You start with office space. People will take a closet to say they’re in the West Wing rather than take a wonderful office in the Old Executive Office Building...⁵³

The elegant old townhouses along Jackson Place row are also White House office space; outfits like presidential commissions, the first lady’s Millennium Council and the Vice President’s Globe Project strenuously vie to be occupants. It is the Management and Administration Assistant who must make the tough calls. But one of them reflected: “What I would suggest...to somebody coming in, is that you have a third party go in and make some recommendations...and then present that to the group, as opposed to having everybody going in trying to figure out what piece they want, and the people that know more about it going in and grabbing up the good space...”⁵⁴ Recalled another: “The President has to get his hair cut. Where are you going to do it?”⁵⁵

⁴⁹ Jodie Torkelson interview.

⁵⁰ Christopher Hicks interview, November 18, 1999.

⁵¹ Christopher Hicks interview, November 18, 1999.

⁵² John Rogers interview.

⁵³ John Rogers interview.

⁵⁴ Richard Harden interview.

⁵⁵ Timothy McBride interview.

Allocation of White House mess privileges, parking space, and passes, etc.

Mess privileges and parking space likewise become objects of contention. The same applies to motor pool privileges, cell phones, West Wing passes, computer upgrades and other perks. As Rogers put it, “These reach fever pitches and people get very emotional about it... I think because the place lends itself to these (as) indicators of status.”⁵⁶

At the beginning of the Bush administration, Management and Administration Assistant Chris Hicks was assigning parking spaces along West Executive Avenue. He recalled:

There are [some] fifteen parking spaces there right next to the West Wing. So I put all the new Assistants to the President...there so they had the best parking spaces... I had one guy...[he] found me literally...outside the Oval Office... on inauguration morning and started screaming at me for, (1) I hadn't gotten artwork hung up in his office, and (2) I had the audacity to put him at the end of that line of parking spaces. He didn't want to be number fifteen, closest to Pennsylvania Avenue; he wanted to be number one... All that kind of bullshit -- it's real petty stuff.”⁵⁷

Any problems associated with allocating these perquisites will be worsened if the allocation process is perceived to be unfair. This is the situation Torkelson found when she took over the Office of Management and Administration early in the Clinton administration.

What I saw was a lack of systems and procedures...no clear, set guidelines on how anything was done. It was sort of by whim on whether people at the time in that office liked somebody or disliked somebody, whether you had mess privileges, whether you got motor pool privileges, whether you had cell phones, whether your office got taken care of when they did computer upgrades. ⁵⁸

Another issue is passes. Outsiders don't have passes; to enter, they need clearance from someone on the inside. In one administration, the National Security Council devised a system for evading the personnel ceilings: they got a detailee from the Coast Guard but, explained the Management and Administration Assistant, “they would not come to me for the pass because they knew I'd say no to the new detailee...so they'd just repeatedly clear him in ...there was literally a guy... who got cleared in daily for about a year.”⁵⁹ Now a computer system identifies people who are cleared in overly frequently.

Every Management and Administration Assistant also has the problem of determining internal access:

Who does get a blue pass to go in to the West Wing? Everybody doesn't need to have a blue pass just because they want to walk around the halls... Obviously, anybody who worked in the West Wing needed to have one. That took care of fifty people. Now how about the other thousand people in the complex that all want a blue pass? How do you make the determination? We actually set up criteria based on frequency of having to go over there... We set up caps on numbers of passes per office...putting some limits on managers.⁶⁰

It seemed possible to acquire these privileges by virtue of association with the campaign, or by dropping the name of the President or First Lady. Torkelson responded by developing general criteria to be applied fairly to all staff, dealing straightforwardly with complaints of unfairness and

⁵⁶ John Rogers interview.

⁵⁷ Christopher Hicks interview, November 18, 1999

⁵⁸ Jodie Torkelson interview.

⁵⁹ Christopher Hicks interview, November 18, 1999

⁶⁰ Jodie Torkelson interview.

thus, in her view, contributing to better morale. (Torkelson, 15) In order to succeed in doing this, Torkelson noted, the support of Chief of Staff Leon Panetta was absolutely necessary.⁶¹

Supervision of other staff operations, computers, etc.

a. Security

The sensitive nature of the Office of Management and Administration operations cannot be better illustrated than by reference to the Security Office. Failure by White House security staff to properly handle FBI files from the previous administration led to the “Filegate” episode that contributed to the reputation of the Clinton administration as inept. Craig Livingstone’s White House security group soon was merged into the Office of Management and Administration’s existing security office.⁶² Torkelson explained that it worked out well because the career staff constitutes a strong work force.

That’s why I say, in the Executive Office of the President... that the career staff really pull their weight. It is not a 9 to 5 kind of crew. They can’t be, there are so few. Everybody’s got so much to do. I think people love the fact that they work for the presidency and enjoy being there and they know that they’re someplace special.⁶³

b. Telephone Service

Similar praise is heaped upon the professionalism and work habits of the White House Telephone Service. Jodie Torkelson spoke for just about everyone in saying “I still to this day think the telephone operators are some of the best people in the business.”⁶⁴ Timothy McBride agreed, wondering at President Clinton’s early efforts to cut that staff, and at their suspicion of careerists in other capacities as well. The White House careerists, in his view, “would serve the Office of the President and the institution with great respect.”⁶⁵ Torkelson’s task in the area of phone service was simply to see to it that the operators got adequate computer support.⁶⁶

c. Interns and Volunteers

The White House hired unpaid summer interns as early as the Ford administration; the Reagan White House followed suit; the Bush White House expanded the program to be year-round. Under President Clinton the program exploded -- at its beginning 1000 college-age students, in four groups of 250 each, were recruited into three-month service. The Intern Office is directly supervised by the White House Operations chief who reports to the Assistant for Management and Administration. The interns are given minimum orientation about security and conduct and are then assigned to the offices requesting them. Questions arose about access to sensitive areas of the White House, and about dress (the Management and Administration Office was once dubbed the “hemline police”).

A thousand volunteers are also part of the White House staff community; offices like Correspondence and the Social Office simply cannot function without them. While the Volunteer Office itself is in the Staff Secretary’s bailiwick, the Management and Administration Office

⁶¹ Jodie Torkelson interview.

⁶² Jodie Torkelson interview.

⁶³ Jodie Torkelson interview.

⁶⁴ Jodie Torkelson interview.

⁶⁵ Timothy McBride interview.

⁶⁶ Jodie Torkelson interview.

recognizes that this indispensable cohort is inextricably woven into the total White House staff family.⁶⁷

d. Information Systems and Data

Information systems management is, in fact, a major area of responsibility within the Office of Management and Administration. McBride recalls the difficulty of getting money from Congress to upgrade computer and phone systems. “And we were under a great deal of pressure... from the House oversight folks... who (were) quick to define just about everything that existed over there as perks of the White House.”⁶⁸ Where money is concerned, even routine management tasks can become “political” issues.

When the Clinton administration moved in, they discovered that there were more than two dozen different name-and-address files totaling 300,000 names, but maintained in separate White House offices: in Correspondence, the Social Office, Intergovernmental Affairs, Public Liaison. Who had attended a White House social event, been sent a letter from the President, was on the Christmas card list? The files were not cross-referenced, were not compatible, some were not even computerized. The Clinton Management and Administration office arranged to have these files consolidated into a single, central database, but found that it had to maintain tight control over it in the central management office -- and even then had to enlist the Counsel’s help to abort a plan to integrate the White House Database with that of the Democratic National Committee.

Much that comes under the Office of Management and Administration – the Photo Office is another example – could be said to qualify as “routine management. But in the White House, very little can be counted upon to be, or to remain, routine. Nonetheless, the lesson that reemerges here is that the professional staff in the White House is a valuable resource, to be nurtured and relied upon.

Building Maintenance

The Management and Administration Assistant is Building Manager for the White House. Will the budget allow for a new roof for the Eisenhower Executive Office Building? Can cables be installed in the floor or in the historic walls of the East Room, so it is wired for sound and video? A special event requires filling the Roosevelt Room with chairs; can the huge table there be temporarily moved out? There is a leak in the roof of the Situation Room -- which is underground, under the lawn. Is it possible to fix it without destroying the Park Service’s treasured lawn and gardens on top? To accommodate extra staff, may a cubicle be built by chopping up the domestic policy chief’s venerable, beautifully paneled office? Is there money for refurbishing the Vice President’s residence? What about shutting down East Executive Avenue and building a park there?

People are swiping the historic doorknobs from the Eisenhower Executive Office Building -- most of the original ones have now disappeared -- how can this be stopped?. These and a hundred other problems and projects must be evaluated.

Fitting the Secret Service into the Mix

Besides discharging its direct bodyguard duties around the person of the President, the U.S. Secret Service has a broad protective mission: designing and constructing the physical White

⁶⁷ For a full discussion of the intern and volunteer programs, see *The White House Staff: Inside the West Wing and Beyond*, Part 3.

⁶⁸ Timothy McBride interview.

House environment to meet challenges, as the Service sees them, to presidential security. The Service insists on building a new Northwest Gate, installing ballistic glass in the Residence windows, emplacing bollards along the Avenue sidewalks, closing off Pennsylvania Avenue in front of the White House. Measures of this sort affect many other offices in the whole White House community; some are of wide public concern. The Management and Administration Assistant is a bridge between that total community and the leadership of the Service. It's a bumpy bridge, however.

Former Management and Administration assistants warn that the Secret Service, in its zeal to protect the President, may be hard to control, even when they might be seen as going to extremes. The closing of Pennsylvania Avenue in front of the White House, for instance, may enhance presidential security but also has its costs. As John Rogers stated, "You start building barricades around barricades around barricades [and] you send a message to the people about the nature of the institution..."⁶⁹ The most important key to managing the Secret Service is to try to assure that they at least check with the Office of Management and Administration before acting.

OVERSIGHT OF THE OFFICE OF ADMINISTRATION

Since Office of Administration's original Executive Order specifies that it "shall, upon request, assist the White House Office by performing its role of providing those administrative services which are primarily in direct support of the President,"⁷⁰ half of the Office of Administration staff of 202 persons can be counted as part of the White House staff community itself. The Director of Office of Administration is appointed by the President but is not confirmed by the Senate.

In addition to its direct help to the White House, Office of Administration supports several other agencies of the Executive Office. For these collective purposes it has divisions for "Facilities Management" (including preservation of the Eisenhower Executive Office Building, which is a National Historic Site and sponsoring Saturday public tours there), "Financial Management," "General Services" (printing, messengers, procurement and property management), "Human Resources Management," "Information Systems and Technology" (telephones, computers and software), "Security" and "Library and Research Services." Richard Harden discussed the beginnings of the contemporary White House Library in the Carter Administration. About the "library" for instance. A Carter Management and Administration Assistant recalls its beginnings: *De jure*, the Office of Administration is a separate unit of the Executive Office, reporting to the President. *De facto* it is the institutional backstop for, and takes its instructions from, the Assistant to the President for Management and Administration.

I asked to see the White House Library. I got this funny look and they said "Fine." So we go down to the basement of the Old Executive Office Building, down this hall, and finally come to two rooms. One room is full of old law books and whatnot that looked like they had been there forever. The other had magazines... There were two nice old ladies there. I said 'What do you all do?' They said 'Basically, when someone calls and asks for something, we call up the Library of Congress and have them send it down.' That was 'the White House Library.' ...What we did was move it up to the third floor, where it is now. We hired a professional librarian to come in and manage it.⁷¹

⁶⁹ John Rogers interview.

⁷⁰ Executive Order 12028, of December 12, 1977, Section 3(a)

⁷¹ Richard Harden interview.

The three Office of Administration-managed libraries now have over 65,000 volumes and 1,000 journal titles.

Because the position of Office of Administration, the director does not have White House status, because the Assistant to the President for Management and Administration does have that status, and because White House assistants do not (except in the rarest of occasions) testify before Congressional committees. It is the Director of Office of Administration, rather than the Assistant to the President, who testifies about and defends the “White House” budget before Congressional committees. To be technically precise: the Office of Administration Director appears before the House Appropriations Subcommittee on Treasury, Post Office and General Government (and its Senate counterpart) to present and defend nine budget accounts: “Compensation of the President,” “White House Office,” “Special Assistance to the President” (meaning the Vice President’s office), “Official Residence of the Vice President,” “Office of Policy Development,” “National Security Council,” “Unanticipated Needs,” the “Office of Administration” itself and the “Council of Economic Advisors.” The first seven, and half of the eighth, can collectively be termed “White House.” Since the Chief Usher is a White House staff officer and thus a non-testifier, the National Park Service defends the budget of the Residence. Defense, Secret Service, State, GSA and Archives separately defend their own budgets, including those parts that support the presidential office.

The Staff Manual

The Management and Administration Assistants in the Clinton White House recognized the need for a written set of White House administrative processes, and wrote a 131-page booklet of the “rules of the road” for White House employees. It lists services available to employees, gives instructions about procedures to be followed, presents samples of forms to be used and includes a map of the White House neighborhood. A detailed annex lays out the legal and ethical regulations which apply to White House employees, and the Manual even concludes with a directory of commonly used White House acronyms -- POTUS, VPOTUS and the rest. It is hoped that this publication will be replicated by future White House administrators.

The Comprehensive Design Plan for the White House and President’s Park

On December 2, 1998, after three years of careful consultation among eleven cooperating federal agencies and organizations, the National Park Service released a 408-page proposal for major upgrading and renovations of the White House neighborhood. To eliminate surface parking and limit vehicular traffic a large parking garage would be built under the Ellipse and a smaller one, for presidential motorcade and other VIP cars, would be built underneath Pennsylvania Avenue. Efficient new underground meeting and conference facilities -- including a much-upgraded area for the press -- would be constructed under West Executive Avenue. The Visitor Center in the Commerce building would be transformed into a museum with four video theaters and then an underground corridor/moving sidewalk, which would move tourists into the White House.

Whether, and how quickly, to initiate this impressive multi-agency program and how to preserve the administrative capacities of the presidency in the face of massive construction activities, will be on the agenda of the incoming Management and Administration Assistant as the new President begins his governance.

V. THE ADMINISTRATIVE ENVIRONMENT

The Management and Administration assistant's relationships to White House and the Executive Office of the President units can be envisioned at three levels. First, the assistant is in a supervisory role regarding the units under the Office of Management and Administration. However, as noted above, the relation to each of these takes a different form. Former assistants report White House operations as an ongoing, intense concern. Herein the assistant is responding to the needs of the President and his White House staff. As one former assistant put it: "I think the bigger role of that job is to make the presidency operate more efficiently"⁷² It is also in the White House operations arena that the assistant is working with units that are very heavily composed of political appointees with less institutional memory than exists in the staffs of some other units.

A second level of relationships of the Office of Management and Administration is with the other co-equal offices of the White House. This is primarily a service relationship in which the Office of Management and Administration provides administrative support to those offices and deals with requests concerning special needs regarding services or transportation. There is a capacity for these relationships to become combative, given the status and perquisites distributed by the Office of Management and Administration. Additionally, there are Executive Office of the President units that have found administrative resources elsewhere in the executive branch to end-run the Office of Management and Administration's control over administrative budgets. The National Security Council in the second Reagan administration is a case in point of such efforts. Iran-Contra is the quite visible indication of that unit's entrepreneurial activity. But, as described above, the National Security Council had, over one weekend, covertly expanded its offices in the Old Executive Office building. Additionally, the National Security Council also acquired computer facilities that were funded by the Department of Defense and not from within the Office of Management and Administration's budget for information technology.⁷³

A third level of relationships of the Office of Management and Administration and the assistant for Management and Administration is with senior White House staff. Whatever the presidency, the assistant for Management and Administration depends upon close relationship with two other senior White House staff, the Chief of Staff and the White House counsel. The Chief of Staff is a key person to the Management and Administration assistant because the chief is an enforcer in the White House world. the Office of Management and Administration centrally allocates scarce resources and desired privileges within the White House and Executive Office of the President. Invariably, there are members of that world who will balk at, and appeal, the decisions of the Management and Administration assistant. Jodie Torkelson noted she could rely on backing by White House Chief of Staff, Leon Panetta: "We... had an unspoken rule which was I'll be the bad guy... but you can't overrule me and make it hard to do the job"⁷⁴

The necessity of a trusting relationship between the assistant for Management and Administration and the Chief of Staff ought to be considered in the initial choices of White House personnel during the transition. In Torkelson's case, she had worked for Panetta in the Office of Management and Budget. The strong professional relationship that carried over from there made her a particularly apt choice as Assistant for Management and Administration during Panetta's time as Chief of Staff.

⁷² Christopher Hicks interview, November 18, 1999.

⁷³ Christopher Hicks interview, November 18, 1999.

⁷⁴ Jodie Torkelson interview.

A second crucial senior staff level relationship of the assistant for Management and Administration is with the White House Counsel's Office. The Office of Management and Administration has its own counsel within the Office of Administration, but the office deals with a range of issues that demand close, supportive work with the Counsel's Office. And in some of these matters, the Office of Management and Administration serves the counsel's needs. In the continual requests from courts, the independent counsel and congressional committees for material from the Clinton White House, Jodie Torkelson reported that her office served as the Counsel's Office "one-stop shop. They could call and say can you get this; what about this, can we get that, because most of the stuff that occurred had something to do with my operations."⁷⁵

Perhaps the more typical relationship between the Counsel's Office and the Office of Management and Administration is represented by Christopher Hicks's observation that there is no inspector general in the White House: "So there's nobody looking after stuff except perhaps the administrative guy and the counsel."⁷⁶ The Office of Management and Administration's personnel work, involving security clearances and personal information, its control of budgets and salaries, and its administration of travel, the motor pool and other perks, make its decisions subject to ethical concerns. Consequently, the assistant for Management and Administration in any administration is consistently in need of consultation with the counsel's office.

VI. WORK LIFE

To track the typical day reported by past assistants for management and administration is to observe the demands on their time and the other entities in the White House constellation to which they most frequently relate. The working day for the Management and Administration Assistant in the last three administrations begins with the early morning senior staff meeting. Thus, at the beginning of each working day the Management and Administration assistant is connected to the overall focus and problems of the White House. The presence of the Management and Administration assistant at a senior staff meeting that typically focuses on policy and politics is more than ceremonial. The logistics whereby the President moves and the White House stage is set to present the President are within the Management and Administration Assistant's domain. Thus he or she is necessarily present at that meeting as the key facilitator in the President's organizational system.

The remainder of the Assistant's work day focuses upon management and administration in the White House environs. John Rogers described his attention on normal working days as focused on "the operating plant of the White House" structure as well as administrative operations. He continues: "it was a lot of personnel and budget meetings, operating meetings."⁷⁷ Rogers reported that he put substantial time and energy into building maintenance, renovations and landscaping. He also described his workday as one of "running from meeting to meeting... I would tend to be there until nine o'clock, ten o'clock at night."⁷⁸

Timothy McBride experienced that general White House meetings were early or rather late in the day. Between them the assistant for Management and Administration focused on the business of his or her domain. McBride reported that his working day entailed almost daily

⁷⁵ Jodie Torkelson interview.

⁷⁶ Christopher Hicks interview, November 18, 1999.

⁷⁷ John Rogers interview.

⁷⁸ John Rogers interview.

meetings with the supervisors of the units within the Office of Management and Administration. “I often tried to get around to the different offices and meet with the different offices at their location.”⁷⁹ Assistants for Management and Administration report a notably wide range of responsibilities in their daily jobs, from the systemic to the trivial. These responsibilities range over physical plant and logistics of space usage through the manifold functions of the military office and information technology issues to individual personnel problems and dress codes. As he worried about roofs, landscape, security, and presidential and press travel, Timothy McBride reported that he also “had one fairly senior manager who couldn’t seem to manage a particular staff member. So we would help to try to deal with some staff issues... We at the time [also]... had an informal hemline police, folks who would send women home to change if they showed up with skirts that were too short.”⁸⁰

The intense pressures of the Management and Administration assistant’s job are caused by the sensitivity of the issues it deals with as well as the range of its responsibilities. Who gets the most privileged White House pass? Who gets into the mess? Who gets the best parking spaces, the best offices? John Rogers noted: “It can be intense and things can also be very emotional... You start with office space. People will take a closet to say they’re in the West Wing rather than take a wonderful office in the Old Executive Office Building; who’s on the plane, who’s not on the plane” (Rogers, p. 26). Jodie Torkelson’s emphasis on the importance of a strong relationship with the Chief of Staff is vitally important in this context.⁸¹

Timothy McBride, as noted above, had physical plant issues, such as redoing the roof of the Old Executive Office Building, as priorities. In the face of such pressing physical plant issues, McBride observed that there seemed too few resources to think about upgrading information technology or even the phone system within the White House.⁸²

A theme that Jodie Torkelson sounded that applies to any assistant for Management and Administration is that she understood an important part of her job description to be maintenance of administrative efficiency and accountability. She observed that when she arrived on the job:

The White House Office [and Office of Administration]... needed to have a little more attention paid to the books and tracking things and policy and procedures put in place. Bills sometimes weren’t being paid; vendors were calling months later and hadn’t gotten paid. There didn’t seem to be a tracking system for a lot of stuff.... That was a big piece in all of this: accountability and how did you monitor and track.⁸³

Timothy McBride’s experience as assistant for Management and Administration in the last year of an administration indicates changes in the job’s focus subject to the political calendar. During campaign periods “the President is traveling more than a President otherwise would. And part of that involves support for the President... So a lot of 1992 was focused on insuring that the military office was prepared to support the President... that we have the physical assets to support the President.”⁸⁴

Perhaps because of the pressures of the campaign period, Timothy McBride reported attending a second daily White House staff meeting in the late afternoon. This was the communications meeting, bringing together the press, communications, political affairs assistants

⁷⁹ Timothy McBride interview.

⁸⁰ Timothy McBride interview.

⁸¹ Jodie Torkelson interview.

⁸² Timothy McBride interview.

⁸³ Jodie Torkelson interview.

⁸⁴ Timothy McBride interview.

with the Chief of Staff and others. Among other subjects, that meeting would look at and plan the President's travel, and the assistant for Management and Administration's role therein was to assure the means for travel by the President, the staff and the White House press.

The descriptions of their work lives by former assistants for Management and Administration gives one the sense that this is a job in which one is pulled apart by different, competing responsibilities. In their recollections, the parts of the Management and Administration responsibility seem not to cohere into a manageable whole. However, Torkelson's successor as Management and Administration assistant in the Clinton White House reported an approach that gives the role a means for imposing some coherence on the diverse financial, personnel, logistical and technology dimensions of the job. Virginia Apuzzo inaugurated a management system that views the White House as a single entity. In contrast to past approaches in the White House which were more a matter of "stovepipe" management in which each office and each function was budgeted and staffed independently. By contrast, Appuzzo saw White House and Executive Office of the President budget and personnel lines as comprising fungible resources managed through her office.

THE KEY PLACE OF NON-POLITICAL PERSONNEL IN THE EXECUTIVE OFFICE OF THE PRESIDENT

For the winners, transitions into the presidency can feel as if the good guys are breaching the wall and occupying the castle. Consequently, those found inside the castle must be the last remnants of the now defeated enemy. In fact, the men and women left behind in the Executive Office of the President offices by the outgoing administration are most often staff people performing necessary, routine functions over many years under the umbrella of the Office of Management and Administration units. Thus, there is merit in concluding this memo by reiterating a lesson repeated throughout the interviews with former the Office of Management and Administration heads; protect and value the non-political personnel of the Executive Office of the President.

John Rogers related that as the Reagan administration took over in 1981 there was an impetus after the inauguration to remove the long time employees such as White House telephone operators, the Travel Office, and records keeping. The new team impulse was to surround itself with people from the campaign. Rogers explained that his initiative to form the Office of Management and Administration initially was, in part, to create a point of leverage in the White House where operations and routine operations staff could be protected from the impulses of the political people around the President.⁸⁵ In effect, the Office of Management and Administration creates a separation between internal operations in the White House and political considerations and appointments.

Timothy McBride, assistant for management and administration in the Bush administration, stressed that he found that he was supervising staffs of functional specialists who through experience served their customers particularly well. He said: "I believe [they] represented the President and the White House well, and they... kept the place running administration after administration. I know many of us had a... great respect for what they did. People in the clerk's office, the telephone operators, the mail delivery folks, the messengers, the correspondence people, these men and women... really kept the place going."⁸⁶

⁸⁵ John Rogers interview.

⁸⁶ Timothy McBride interview.

The cumulative experiences of these three administrations regarding personnel suggests two lessons that the incoming administration should recognize and its assistant for Management and Administration actively promote:

First, understand the roles of the non-political personnel within the White House offices.

Second, protect the security and morale of those non-political against the initial impulses in a new administration to replace career employees with campaign supporters.

CAPTAIN OF THE MINESWEEPER

While illustrations and examples are given here, this paper only hints at the steaming stew of administrative/legal/security/military/financial/personnel issues which must be superintended by whoever is the Assistant to the President for Management and Administration. As Bush Management and Administration Assistant Christopher Hicks observed: “The White House is the only agency without an inspector general.... I always thought that was part of my job.... If I saw something I didn’t think was proper, I would go to the Chief of Staff. It’s the Chief of Staff’s decision, then, if he wants to pick a fight or not.... More inspector generaling is needed... [and] it’s the person in my position....The infrastructure of the White House as a place to work and support the President -- whichever one happens to be sitting in the Oval Office --[became] a better place, and he, the President, [was] better supported, because the office of the President -- from an administrative standpoint -- worked better. And it can always use improvement.”⁸⁷

What are the qualities most needed in an effective Management and Administration Assistant? Clinton Assistant Torkelson summed them up:

I think the most important quality is always to be able to be an honest broker, because you can find yourself in positions where it’s very easy to just have your one opinion rule a day, but you really have to fairly present all sides, so that even if you are the ultimate decision-maker, people understand how you got to that decision point. I think... a lot of times people disagreed with what I did, but I would always sit down and say ‘This is why,’ and they could at least see my train of thought. [What’s important?] Being as much of an honest broker as you can, and not using the office for your own swollen head purposes -- because I think that’s when people make the biggest mistakes.⁸⁸

And the element which, in the end, is *sine qua non*? Torkelson made that clear, too:

The President never stepped in once in all of my time at the White House.... Never once did he overrule me, did he question what I had done, did he step in and say ‘Did you think about this again?’ Not once. I know that there were a lot of people who were very close to him who sometimes didn’t like a lot of things that I did, because it limited some of their perks... I knew that they talked to him but ...[he] never once interfered... I think even with my relationship with [Chief of Staff] Panetta, as strong as it was, he could have undermined that so easily, and never once did.⁸⁹

⁸⁷ Christopher Hicks interview, November 18, 1999.

⁸⁸ Jodie Torkelson interview.

⁸⁹ Jodie Torkelson interview.

“Somebody once said,” observed Hicks, “that my job -- when I was head of administration -- is like being captain of a minesweeper. As long as you’re doing your job, nobody knows you’re there. You make one mistake and there’s a hell of an explosion.”⁹⁰

Christopher Hicks has observed that the OMA assistants interviewed all share a perception that the office was in some sort of disarray when they arrived, but that they left it in better shape. Clearly, this speaks at least as much to the incoming assistants’ perceptions as to the actual condition of the office at any time. Hicks suggested that one possible explanation is that new people simply don’t fully understand what they are facing.

One possible reason for this, Hicks suggested, is the Presidential Records Act, which makes records unavailable to new administrations. This problem is exacerbated to the extent that new OMA chiefs do not have good communication with their predecessors. In addition, Hicks noted, the value of the career people, and the extent to which they might actually have things under control, tends to be underestimated at first. Finally, and perhaps most importantly, he noted that OMA is so complex and atomized that any director is forced to focus on only a part of it. Most likely this focus will be upon those elements that seem to be the most problematic or troublesome at the time. The sheer diversity of its elements almost guarantees that the office as a whole will be unstable in some respect at any point, and thus will present problems that need to be solved. Attention to those problems will at the same time compel other matters to be relatively neglected, creating new problems for the next incumbent.

The nature of OMA makes it resistant to any solution to these problems. However, the better incoming administrators understand the challenges they confront, the better they will be able to prioritize their own limited resources and those of their staff.

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