



2009-21  
THE CHIEF OF STAFF

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# THE WHITE HOUSE TRANSITION PROJECT



REPORT 2009-21

## THE CHIEF OF STAFF

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### INTRODUCTION

The White House Office of Chief of Staff is crucial to the successful operation of the contemporary presidency. As former President Gerald Ford explained:

I started out in effect not having an effective chief of staff and it didn't work. So anybody who doesn't have one and tries to run the responsibilities of the White House I think is putting too big a burden on the President himself. You need a filter, a person that you have total confidence in who works so closely with you that in effect his is almost an alter ego. I just can't imagine a President not having an effective chief of staff. (Ford)

Ford's second chief of staff, Richard Cheney, elaborated on the need for effective White House organization:

Well, it's crucial in terms of how he's going to function as President, whether or not he's effective. His reach, his ability to sort of guide and direct the government, to interact with the cabinet, to deal effectively with the Congress, to manage his relationship with the press, all of those are key ingredients to his success. The White House staff structure and set up and how it functions as an organization determines whether or not he is successful in these relationships. No matter how hard he works or how smart he might be, he can't do it by himself.

The job of the White House chief of staff has many common elements from one administration to the next. But there are also key differences, resulting mainly from different Presidents' ideas work styles and beliefs about how the White House should operate. Many former chiefs have stressed that the chief's most important job at the beginning of an administration is simply to find out "what the job is." Mack McLarty, for instance, reported that after talking to most of his predecessors about the job, James A. Baker III told him, "Well, Mack, you just kind of have to be there." (McLarty) In any case, a chief's understanding of the job has to arise out of close communication between the new president and chief of staff, since the President defines the chief's role. But former chiefs likewise stress the value of

understanding the basic nature of the job, the possible variations in its performance, and, above all, the pitfalls that any chief of staff must avoid. The best way to do this is to talk with those who have held the job before. A typical comment is that of Landon Butler, deputy chief of staff in the Carter administration:

I think, by and large, we learned far more from our predecessors than we did from any written material. We learned from our predecessors and they were very helpful. They genuinely wanted us to be successful at running the White House at least. (Butler)

To supplement such conversations, though not to substitute for them, we present here a summary of the wisdom offered by former chiefs in extensive interviews.

## **I. BASIC ELEMENTS OF THE JOB IN BRIEF**

As recently as the beginning of the Carter administration, it was possible to argue that the White House could be run without a chief of staff. Those days are past. The complexity of the modern White House requires discipline and coordination that can only be achieved if there is a central coordinating point, someone other than the President to oversee the operation. This job is not easy. Long days, constant crises, and persistent rivalries, much of them built into the institutional structure and processes, the roles of the personnel that occupy the White House, and overlapping missions and interests, create a pressured short time-frame in which to operate. Many chiefs see their job as the second most important and most difficult in Washington. To underline the point, James Baker, who served as chief of staff under two presidents, includes the chief of staff office along with Presidential personnel and the counsel as the three jobs that should be filled first, because these people have “got to help the President pick the rest of the administration.” (J. Baker, I)

Table 1 provides a listing of all chiefs of staff beginning with the Nixon administration. Since 1969, nineteen individuals have served in that office for an average tenure of two years—an indication of the stress and burnout caused by the position.

### ROLES

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Most chiefs of staff agree on the critical roles they must perform. These, while interrelated, fall into two broad categories: managerial and advisory.

#### *1. Managerial roles*

- select the key people on the White House staff, and oversee them
- structure the White House staff system, including the Chief of Staff office
- control the flow of people and paper into the Oval Office, adjusting it to the President's style of doing business
- manage the flow of information and opinion to and from the President and do so in a way that brokers honestly among differing perspectives and recommendations

#### *2. Advisory roles*

- advise the President on issues of politics, policy and management
- protect the interests of the President
- negotiate with the environment of the presidency, including Congress, the executive branch, and extra-governmental political groups and individuals

**Table 1. White House Chiefs of Staff in The “Modern” Era, 1969-Present**

CHIEF OF STAFF	TENURE	PRESIDENT	PARTY
Harry Robbins Haldeman	1969-73	Nixon	Republican
Alexander M. Haig, Jr.	1973-74	Nixon	Republican
Donald H. Rumsfeld	1974-75	Ford	Republican
Richard M. Cheney	1975-77	Ford	Republican
William Hamilton M. Jordan	1979-80	Carter	Democrat
Jack H. Watson, Jr.	1980-81	Carter	Democrat
James A. Baker III	1981-85	Reagan	Republican
Donald T. Regan	1985-87	Reagan	Republican
Howard H. Baker, Jr.	1987-88	Reagan	Republican
Kenneth M. Duberstein	1988-89	Reagan	Republican
John H. Sununu	1989-91	G.H.W. Bush	Republican
Samuel K. Skinner	1991-92	G.H.W. Bush	Republican
James A. Baker III	1992-93	G.H.W. Bush	Republican
Thomas F. McLarty III	1993-94	Clinton	Democrat
Leon E. Panetta	1994-97	Clinton	Democrat
Erskine B. Bowles	1997-98	Clinton	Democrat
John D. Podesta	1998-01	Clinton	Democrat
Andrew H. Card, Jr.	2001-06	G.W. Bush	Republican
Joshua B. Bolten	2006-p	G.W. Bush	Republican

*Source: Compiled By Authors*

#### OPERATING STYLES AND ENVIRONMENTS

Although they agree on the roles, they do not agree on a single, “best” way for a chief of staff to achieve them. Some of their disagreement stems from the differing people and circumstances involved. The exact nature of the chief of staff job will depend upon such things as

- presidential styles
- the circumstances in which they inherited their job
- the personnel with whom they had to contend and budget they had to administer
- partisanship (precedents and advice from earlier administrations)

Variations in the White House environment also naturally affect organizational arrangements, operational procedures, and personnel decisions. Such factors include the shape of the staff, particularly at the time the chief assumes office, coordination with other White House units, and the structure of day-to-day activities that must vary with the president’s style, decisional time frame, and to some extent, the administration’s priorities. As we will see below, a chief’s role is a reflection of the president. The chief of staff is always limited by the president’s preferences, views, and habits of management and leadership.

Nevertheless, incoming chiefs of staff can try to negotiate with the president to define their sphere of influence. Andrew Card, George W. Bush’s first chief of staff, observed that although some journalists were describing the relationship among him, Karl Rove, and Karen Hughes as a “troika” of equals, “I told the President that if he wanted to have a troika he should have a troika, but I didn’t want to be one of the three; I would be out. I felt very strongly that the chief of staff should be *the* chief of staff, not *one of the* chiefs of staff. (Card II)

### PERSONAL ATTRIBUTES, STRATEGIES, AND TACTICS

In addition to role, structure, and processes, the chiefs agreed that certain personal attributes, political strategies, and operational tactics are more likely than others to be successful. *Decisiveness, sensitivity, credibility,* and *political savvy* are deemed essential traits for the job.

Strategies based on realistic assumptions about public expectations, those that correctly anticipate elite and public reactions, and those that consider the mood of the country and are designed to work within the broad parameters of public opinion are more apt to achieve the desired goal. Similarly, tactics that incorporate the president's bully pulpit to gain political leverage, that see information as an instrument of power, are also most likely to be successful in today's public-media environment.

Chiefs of staff and their deputies also expressed general agreement on the dangers that may be encountered. Their warnings to future chiefs echoed difficulties that tend to be intrinsic to the job. We will explore these areas of agreement and disagreement in our summary of their advice to future chiefs of staff.

## II. MANAGERIAL ROLES

### SELECTING AND MANAGING WHITE HOUSE PERSONNEL

Ultimately, the entire White House staff, with very few exceptions, will report to the president through the chief of staff. At the outset of an administration, the chief of staff should and often has been primarily responsible for putting together the staff in the first place. Having one's own people is essential. Loyalty, energy, dependability, temperament, and work style are important attributes for working in the White House. At the same time, a chief must ensure that no matter what personal agendas aides may have (and most aides do have them), it is the *president's* agenda they pursue. (Moore) More generally, James Baker advised would-be chiefs of staff that:

The people who succeed in Washington are the people who are not afraid to surround themselves with really good, strong people. If you're afraid to surround yourself with really top-notch, quality people – because you're afraid they'll overshadow you or what not, and there is a lot of that that goes on – you're not going to succeed. A strong White House staff buys the President one hell of a lot... (J. Baker, II)

Typical of a chief given responsibility for selecting his team was John Sununu in the Bush 41 administration. A White House observer recalled:

When the White House staff was put together, there was very little interaction with the other part of the transition. In other words, it was basically Sununu did his own thing . . . anybody that was appointed by the President, that would be an assistant to the president, deputy assistant to the president, special assistant to the President, the President was involved. But to his credit, he gave a very long leash to John Sununu – “If that's the team you want, that's okay. Or, “Are you sure you really want to do it? If you really want to do it it's okay.” But the benefit of the doubt went with John Sununu in putting together the White House staff. (background interview)

However, Sununu did not have complete control over selecting his team as evidenced by the fact that Andrew Card was tapped as deputy chief of staff by President-elect Bush himself. (Card II)

In order to exercise effective control over White House operations, chiefs of staff must be able to pick at least their principal deputies. Prior to the beginning of an administration, the chief of staff-designate should oversee the White House transition which should be separate from the rest of the transition to government. Two criteria deemed essential in the initial choice of top staff aides are political savvy and Washington experience. James Baker noted:

It [political credentials] gives you far more cachet in policy debates and inter-departmental policy... If you've been out there fighting the political wars with the President, you're in a better

position to speak to those issues than other people who just maybe gave some money... (J. Baker I)

W. Henson Moore, Samuel Skinner's deputy and a former Member of Congress, remarked that both the chief of staff and the deputies... "really ought to have some political experience. This is no place to have on the job training in politics...they've got to have some political instincts." (Moore)

Marlin Fitzwater likewise noted the difference between the management challenges of the White House and those elsewhere, and the importance of both Washington experience and personal relationships:

When you talk about management of the White House from the chief of staff, you're really talking about twenty people, a very small group. And that turns out to be a very personal kind of thing. Then there's a second circle of management in which you're kind of directing cabinet officers and deciding agenda issues and matters like that that grow out of it. But in terms of the people management it's a very small group and it's always a personality kind of thing. And that's also why I think businessmen have such a difficult time. There's always this kind of feeling when you bring in businessmen or businesswomen with experience and they'll bring some professionalism to the organization. And they always fail because they always think in line-staff structural relationships and in business they don't have to worry about personal relationships because they have the power. They give orders; they take away your salary; they can fire you; they can give you bonuses. And in the White House all those normal management techniques go out the window. Oftentimes you can't fire people. (Fitzwater)

A third factor, implicit in the advice that the chief of staff pick the top staff, is loyalty. Samuel Skinner noted that

Once a loyalist of a president gets in there... it's the normal tendency of everybody including presidents and chiefs of staff and everybody else to honor that loyalty and, if somebody is trying to push them out, to protect them. So there's a tendency, if loyalists get in to the White House and they... don't have a duty and responsibility to the chief of staff as having put them there, the chief of staff can have them go around him very easily unless you have a President who never lets that happen. Even though you control the process, there are ways to get around it.

Naturally a chief of staff who comes in the middle of an administration usually does not have the luxury of completely cleaning house, but must be able to have some flexibility in getting the shop in order and his people placed. This was the problem that beset Skinner and to a lesser extent, Leon Panetta when they took over for Sununu and McLarty respectively. In the words of Henson Moore,

The President had his staff. He had been goaded, pushed, convinced into getting rid of Sununu and Card, people... he liked. And he wasn't going to hear of anybody else being replaced on that staff. So once that word gets out to the people who are supposed to be reporting to you and taking orders from you that you can't touch them, you have limited authority to really make things happen. (Moore; see Skinner)

Skinner concurred, noting that "the President also made it quite clear that he did not want a wholesale change in his staff." (Skinner) But, said Skinner,

A good friend of mine, Vernon Jordan, told me... you've got to have your own people in order to make anything work in Washington. I think those people have to be accountable. The only other way you're going to do that is to fire one of the President's favorites and let it be known that you've got to fire him. That's hard to do.

Leon Panetta encountered some of the same difficulty when he attempted to replace press secretary Dee Dee Myers with Michael McCurry at the beginning of his tenure as chief of staff. Nonetheless, Panetta managed to bring in a core of key people upon whom he could depend. Both Howard and James Baker likewise insisted on bringing in a solid group of their own people when they took over the Office of Chief of Staff during the Reagan and Bush administrations. As Howard Baker's deputy, John Tuck recalled:

He picked his own team, as you well know, except for Marlin (Fitzwater) who stayed, who was there before. Everybody else changed over and it was just understood that when Senator Baker became the chief of staff that it was going to be a Baker team... (This permitted) a strong chief of staff system where the decisions and the decision making process and the people and the access to the president of papers and people was controlled by one person. (Tuck, in H. Baker)

In April 2006, Josh Bolten faced similar challenges of entrenched staffers when he succeeded Andrew Card who had served longer as chief of staff than any individual since Sherman Adams. One of Bolten's first moves was to revamp the Office of Chief of Staff and remove Karl Rove from his position as deputy chief of staff, though Rove kept his senior adviser title. Although initiating a high profile restructuring involving a powerful Washington figure such as Rove can be difficult, especially in this case because Bolten and Rove were on good terms personally, Bolten felt such a move was necessary because Rove had too many responsibilities and not enough time to effectively manage them (Bolten). There also was a concern that because of Rove's stature and celebrity, even inside the West Wing, other staffers were intimidated and would often keep silent during policy debates in his presence (Draper 2007).

Along the same line, James Baker noted that you don't have to fire people to move them out. When he brought his team aboard the White House in 1992, he chose to "layer" the existing staff, moving the new people to the key jobs. "They probably resented that, and probably rightly so. They weren't fired, but they were layered." (J. Baker II)

Keeping people too long, however, can be a problem, especially if personalities clash or working styles conflict with one another. Ford's chiefs of staff faced such a situation in dealing with long-time aide and speechwriter Robert Hartmann, whose dismissal from the White House was out of the question. The solution to this internal problem was to circumvent Hartmann whenever possible. James Baker likewise advised that "one good way to discipline people when you're in a political environment like that in the government is to cut them out of meetings." (Baker II) While sometimes effective in the short run, this approach can allow a persistent source of conflict to remain rooted in the White House. It also opens the door to end runs by people who are out of the loop but who still have access to the president. (Fitzwater)

The same kind of problem can appear when a president wants to replace people, but is reluctant to simply let them go. This invites friction and discontent. As Howard Baker put it, "If you cut the dog's tail off, cut it all off at once." (H. Baker)

More commonly, the problem connected to long-term White House service is burnout. A chief of staff taking over in mid-term may find, as Alexander Haig did during the Watergate affair and Skinner did after Sununu, that key personnel simply have burned out under the relentless pressure of White House work. (Jones; Skinner) Skinner's advice: "I think just find them another job... You probably ought to refresh on a regular basis." (Skinner)

## *STRUCTURING THE STAFF*

### *The White House Office*

A chief of staff can think of structuring in three different senses. The first is structuring the White House Office as a whole. Since most White House staffers report to the president through the chief of staff, the chief of staff must work with the President to set up an overall reporting and decision making system for the WHO. As many White House veterans have noted, this is best done as soon as possible after the election, so the White House staff will be ready to function immediately after the inauguration, if not sooner.

The experience of recent presidencies indicates that there has been relatively little variation in the overall design of the White House in terms of offices and responsibilities. The basic model for the modern White House dates back to the Nixon administration, and has been modified, but only at the margins since then. Thus, it is likely that the major political offices – Congressional Relations, Public Liaison, Communications and Press, etc., will appear in some form in any new administration, as will the key staff organizations, such as the Office of Management and Administration and the Staff Secretariat.



Likewise, the basic model for the National Security Council and its staff, as well as the domestic policy staff, has become stable. The Clinton White House's creation of the National Economic Council in 1993 to deal specifically with economic policy has further institutionalized the operation of a White House-based economic group that has functioned in some form since the Ford administration. The Bush 43 White House kept and utilized the NEC as one of its four policy councils which included the NSC and Domestic Policy Council. The fourth policy council, the Homeland Security Council headed by a homeland security adviser, was created originally by executive order (13228) in the immediate aftermath of the 9/11 terrorist attacks and later made permanent by statute (Homeland Security Act of 2002) thus ensuring that the HSC will be a permanent part of the White House landscape. The NSC also has an air of permanence having been created similarly by an act of Congress (National Security Act of 1947).

Within this overall framework, however, there have been important differences in operating patterns. Most generally, one can distinguish between relatively "strong" and "weak" chiefs of staff. This is, of course, an oversimplification, but it does point to a contrast in organizational strategies. The primary differences are in the degree to which the chief of staff controls information flow to the president and the extent of the chief of staff's control over the president's schedule. As previously noted, the contrast between Sununu and Skinner in the Bush 41 administration, and between McLarty and Panetta in Clinton's, illustrates the strong and weak models of chief of staff. From these examples it is also clear that the relative "strength" of a chief of staff is not just a matter of the chief of staff's preference, but is also dependent upon circumstances. The key point, however, is that the chief of staff is bound by the president's habits and operating style. Andrew Card cautioned that "the bureaucracy of the White House should reflect the needs and personality of the occupant of the Oval Office....The organizational chart should reflect the needs the president has rather than the bureaucracy that he's inherited" (quoted in Patterson 2008: 40). The job of the chief of staff is to make the best of that, and to compensate where possible for whatever weaknesses emerge.

A further dimension of chief of staff "strength" involves the scope of his control of information and access. While all chiefs have sought to oversee the flow of paper and people in the areas of domestic policy and politics, chiefs have varied in their relationship with the national security adviser and the NSC staff in general. The national security adviser is one of the principal potential White House competitors of the chief of staff. Some chiefs, such as Leon Panetta (Panetta), have insisted that the national security adviser go through them, while others have not. This is not always the choice of the chief of staff alone. Nonetheless, it can be a fateful choice. In the first four years of the Reagan administration, for instance, the national security adviser did not report through Chief of Staff James Baker, but through Counselor Edwin Meese. Moreover, once William Clark became national security adviser in 1982, his long-time relationship with the President rendered him outside staff control. (J. Baker II) In hindsight, Baker indicated that he would want his own person in the job of NSA from the start.

Similarly, some chiefs have taken a hands-on approach to the Office of Management and Administration -- again, Panetta is an example (Torkelson) -- while others have not.

On the whole, the "strong" model tends to be the one lauded by most of those who have served as chief of staff or deputy chief of staff. Indeed, Skinner and McLarty are the only recent chiefs of staff since Hamilton Jordan under Carter who did not clearly attempt this approach. But the chiefs caution that this "strength" must be exercised within the understanding that the chief of staff is not the president, and that the chief of staff serves only the president's agenda.

### *Organization of the Office of the Chief of Staff*

#### **General Patterns**

The second structural responsibility of the chief of staff is to design his office. As Howard Baker observed, "... a chief of staff and a national security adviser...are now so loaded with responsibility and with paper... that they sort of get in the same category as the president does. If they don't have somebody prompting them or watching out for them, they'll get in the same fix." (H. Baker) Again, there has not

been a great deal of variation in the organizational schemes for the chief of staff office, but there have been different approaches to dividing responsibility.

Most chief of staff offices have been relatively lean, with one or two deputies reporting directly to the chief. Most Democratic administrations have had two deputies, with one assigned to handle political chores while the other oversees White House operations. Republican White Houses have sometimes relied on just one deputy, whose job has varied. Michael Deaver, deputy chief of staff during the first Reagan term, had a myriad of responsibilities which included, not only the communications and public relations side of the White House, but also the personal care and attention to the President and First Lady. Support services (which included the military office), advance, scheduling, and first lady's staff all reported through him. Andrew Card, Sununu's only deputy, observed: "Governor Sununu felt very strongly that there should only be one deputy chief of staff. He probably felt that there should be no deputy chief of staff." (Card II) The Bush 43 administration, organized at the outset by Card, implemented a very clear division of labor between two deputy chiefs, one of whom handles policy matters, the other operations.

In addition to the chief of staff and deputy or deputies, there have usually been two or three assistants (variously titled "Personal Assistant," "Executive Assistant," "Staff Assistant," or just "Secretary") to the chief of staff and one person at roughly the Staff Assistant level to work under each deputy. By 1998, this number had grown to five.

Beyond that, chiefs of staff have varied with regard to the placement of additional people and duties directly within the Office of the Chief of Staff. Donald Regan, for instance, formally had three deputies (holding the rank of deputy assistant to the President), one of whom, Frederick Ryan, supervised the administration's Private Sector Initiative, and with it a substantial staff.

Election season has normally brought substantial campaign responsibilities to the chief of staff. This has often been reflected in the addition of people reporting to the chief of staff. Jack Watson's office, at the end of the Carter administration, for example, contained several deputies, including a labor liaison and a research director. Leon Panetta's office likewise expanded, providing an organizational home for counselors and senior advisers such as Rahm Emanuel, and George Stephanopoulos, while assuring that they reported to President Clinton through Panetta.

When elections are not impending, a relatively lean chief of staff operation is still a viable option. However, the most recent trend is in the other direction. The second four years of the Clinton White House have witnessed a continuation of the practice of placing senior advisers in the chief's office. Under John Podesta in 1998, for instance, were two counselors (Paul Begala and Doug Sosnik) and a senior adviser (Emanuel) plus two deputy slots, one assistant deputy, the Deputy Director of Millennium Projects, and eight others who assisted these people. Thus the total personnel at the level of staff assistant or above numbered 20. That compares with seven under James Baker in 1992.

### **Division of Labor in Recent Administrations**

A key issue in this organization is how the work is divided among the chief of staff and the deputies. There are clearly more demands upon the Office of Chief of Staff than one individual can satisfy. Delegation is therefore critical. (See Baker II) Patterns have varied depending mainly on the interests and experiences of the chief of staff and top staffers. There is no "one best way" to set things up. Depending upon the background and interests of the chief of staff and the top aides, the office is frequently involved in congressional relations, communications strategies, and political liaison. For instance, former members of Congress such as Howard Baker, Leon Panetta or Henson Moore, were naturally drawn into this arena. Michael Deaver was deeply involved in communications planning as James Baker's deputy, even before he took over the operation formally.

At the outset of the Reagan administration, James Baker explicitly excluded the Chief of Staff Office from policy development, leaving that to Counselor Edwin Meese. Baker assumed responsibility for process. (Deaver) Michael Deaver, who had the title of Assistant Chief of Staff, was responsible for scheduling and travel, the East Wing (the offices of the First Lady and the military) and anything to do with communications. When David Gergen left the White House, Deaver formally took on responsibility for communications. Richard Darman, who replaced Deaver, did not have responsibility for scheduling,

which remained with Deaver, but he did oversee management and administration. Another Deputy, James Cicconi, was primarily responsible for overseeing the decision making process. (Cicconi) When Donald Reagan succeeded Baker, he put three deputies in place, and allowed the Chief of Staff Office to expand considerably. But Howard Baker reverted to a simple model, with two top assistants, one of whom specialized in decision process management. (H. Baker; Tuck) When Baker's deputy, Kenneth Duberstein, became Chief of Staff, the same model was retained.

Little changed under President George H.W. Bush's first Chief of Staff, John Sununu. He had one deputy, responsible for overseeing White House operations, and with a varied portfolio beyond that (Card I) By the fall of 1991, Sununu had only one top aide, the deputy, Andrew Card, along with the usual complement of lower-level aides. As Card described a key element of his job:

I was kind of the bad guy in the White House. As deputy Chief of Staff I did basically all of the salaries. And I was tough. I would say, "No, we're not going to pay that much." ... I was also very tough on the number of commissioned officers you could have... (Card I)

Under Samuel Skinner, the Office of Chief of Staff grew back to a deputy and a counselor (Henson Moore and Cameron Findlay, respectively). Moore dealt mainly with White House mechanics (Moore), with press, scheduling, and speechwriting reporting to him. He also became involved in congressional relations, and the job evolved beyond that:

As it turned out, Sam (Skinner) did not like to travel, so I did all the traveling with the President. . . When you travel with the president you become the chief of staff at that point because the staff is supposed to move with the president. (Moore)

When James Baker replaced Skinner at the end of the administration he brought in his own people, but kept the basic model. In fact, his deputy, Bob Zoellick, "actually ran the White House at that time," while Baker functioned mainly as chairman of the Bush re-election campaign. (J. Baker II)

The Clinton chiefs followed a familiar organizational pattern, with two deputy chiefs (or the equivalent) serving under the chief of staff, but Leon Panetta, in the process of strengthening the chief of staff role, expanded the Office of Chief of Staff. Initially, under Mack McLarty, the responsibilities of the deputies were defined rather loosely, as McLarty adjusted to the particular strengths of Mark Gearan and Roy Neel, and to get along without Harold Ickes, whom he had hoped to employ. (McLarty) When Panetta succeeded McLarty, he made Ickes deputy in charge of political affairs and some oversight of substantive issues, while Erskine Bowles took charge of scheduling and management of White House personnel. Panetta also placed senior Presidential advisers George Stephanopoulos and Rahm Emanuel in the Office of Chief of Staff, assuming that they would report to the President through the chief. Moreover, with the 1996 election impending, Panetta placed additional White House staff units – speechwriting and communications – in the now-expanded Office of Chief of Staff. As chief of staff, after the election, Bowles in part reverted to the earlier pattern, taking considerable scheduling responsibility himself, while speechwriting and communications were moved out of the office. However, as noted above, the Office of Chief of Staff did not shrink back to the simpler model of prior administrations. The senior advisers and others stayed, and the overall staff grew, in part to coordinate the now-expanded office.

George W. Bush's administration has continued to follow the pattern of having one deputy (initially Josh Bolten) for policy and one (Joe Hagin) for operations. While the exact responsibilities of the deputy for policy have varied somewhat – they were truncated slightly when Karl Rove held the post – the job of the deputy for operations has remained constant. Joe Hagin, the deputy responsible for practically everything except politics and policy, described his job this way:

You could say I'm the chief operating officer...I'm responsible for scheduling, advance, Oval Office operations, the White House Military Office, the liaison with the Secret Service, the Office of Management and Administration, which is on the White House side, and then the Office of Administration which is on the Executive Office of the President side. (Hagin)

Beyond the usual duties of the deputy chief of staff for operations, Hagin was responsible for long-overdue and extensive renovation of several important pieces of the White House complex including the Situation Room, the James S. Brady Press Briefing Room, and the Eisenhower Executive Office Building.

### *Informal Structures*

Not all organizational structuring – recurring, predictable activities and responsibilities – is found on organization charts. Successful chiefs of staff have supplemented formal arrangements by initiating regular group meetings with key White House personnel. This has been a key management tool for all chiefs so long as the senior staff meetings do not get too large and unwieldy. (Card I; H. Baker)

In addition, different chiefs and/or deputies have taken the lead in initiating meetings to plan communications strategy (Deaver), brief the Cabinet, plan the President's schedule (Moore), or organize task forces or "war rooms" for the pursuit of unusually important projects. The extreme case of informal structuring can be found in the small group Al Haig brought together during the waning days of the Nixon administration to handle the routine business of the White House while the President focused on his fight for political survival. (Jones) In any case, the desirability or need for such organizational innovations will most likely be dictated by a President's particular agenda and by circumstances, such as the onset of a campaign season, the development of major legislative efforts like Carter's energy plan or Clinton's health care initiative, or major national security initiatives such as the G.W. Bush administration's response to the September 11, 2001, terrorist attacks.

## *CONTROLLING THE FLOW OF PEOPLE AND PAPER*

### *Getting Control of the Paper Flow*

The chief of staff must take responsibility for the operation of the White House. To do so, lines of authority must flow to and through his office to the President. No matter how White House functions are organized, the information flow must be up and to the Chief of Staff, usually through the staff secretary, cabinet secretary and deputy chiefs of staff. Only by monitoring the full flow of paper to the president can a chief of staff assure that all relevant information has been received and all relevant points of view represented.

The fundamental purpose of orderly processes in the White House is to provide the basis for the best-informed decisions possible. The job of the chief of staff is to assure that all relevant voices are heard in the decision process, and that choices are made with the benefit of full information. James Baker summarized:

You have to make sure you have an orderly system, that you have a system that's fair. Otherwise, you start the leaking in the press, one against the other. You have to have a system that lets the President hear all sides. And you have to have one, that if you're going to be running the White House, you have to know what's going on. (J. Baker, II)

To assure such fairness, all recent White Houses have employed a decision process whereby decision memoranda are routinely circulated, usually by the staff secretary, to all officials with expertise or a stake in a Presidential decision. The chief of staff must monitor the workings of this process closely, for it is here, in the framing of the decision and the description of options, that staffers may be tempted to push their own particular interests, or substitute them for those of their principals. Due to the crucial position of the staff secretary in the operation of this system, it is imperative that the chief of staff pick a trustworthy staff secretary. Mark Siegel, who served under Carter, noted that Hamilton Jordan, even before he became chief of staff, was careful to place his own man, Rick Hutcheson, in that position.

Hamilton is a very smart guy and he understood and we discussed that he (Jordan) would control the paper and control the presidency. He would control the paper in the Oval Office, controlled everything. And why he selected this – Rick, at that point he was a baby.

The chief of staff or someone on his staff must supplement the staff secretary in the exercise of judgment as to what gets to the President and what does not. Andrew Card, who had this responsibility as deputy chief of staff under Bush 41, contrasted the staff secretary's monitoring with his own:

They did it watching for policy or consistency of language. I did it to protect the President. Is this something the President has to have today?... the staff secretary job is to be pretty policy wonkish, too. This policy is inconsistent with the one we had the President say last week....That was more of an editorial role; mine was more of how do I protect the President in there from wasting his time and energy. (Card I)

Leon Panetta made a similar point:

I wanted to funnel all of the issues and decision making that ultimately had to go to the President through the chief of staff's operation. That helped a great deal because it came in kind of a vacuum in which staff people and others weren't getting decision on issues unless they had to take it to the President. And there is a lot of decision, frankly, that you could make that don't necessarily have to go to the President..... So my role was to make decisions. If they were important decisions, I would always brief the President. But having those decisions made, whether it's scheduling, whether it's this, whether it's that, keeps that place running. (Panetta)

Beyond decision memoranda, presidents will also require background papers on issues. President Clinton, for instance, "would want maybe a summary with several pages of backup on a particular matter we were considering." (McLarty) The chief of staff is often responsible for the preparation of such materials, and likewise for their thoroughness and balance. At the very least, the chief of staff must monitor what goes to the president. If the President's out box contains material that never went through the in box – if, in other words, people are bypassing the staff system, the chief of staff must address the problem. Whether by paper or in person, such "end runs" will tend to upset the balance of the decision system.

Of course, the discretion implied in these accounts is susceptible to abuse, as well as to the perception of abuse. Although H.R. Haldeman denied that he tried to control policy in the Nixon White House, the perception that he did nevertheless was strong. Thus it is important for the chief of staff to involve other White House staff in his decision processes (Panetta), and to maintain confidence in the essential accessibility of both the process and the President. Sherman Adams imposed a similar procedural rule during the Eisenhower administration. (Adams)

### *Adjusting and Conforming to the President's Style*

The president must feel comfortable with the people on the White House staff and the way it works. Although "the chief of staff's personality dominates the way the White House works, it can only be done if it has the blessing of the president," noted one person who served in that office.

If a president wishes to keep control of a lower level decisional or administrative matter, there is little a chief of staff can do. That such an arrangement may be ineffective needs to become obvious to a president before the system can be streamlined. Ford, Carter and Clinton found this out the hard way at the beginning of their administrations.

Landon Butler, who worked in the Carter White House stated: "We were a direct reflection of what the President wanted around him and what he needed. In our case, Carter played a very hands-on role in virtually every aspect of putting the White House together." (Butler) Mack McLarty also set up the type of system that Clinton wanted:

I think the President's style also wanted a large range of opinions, to be coordinated for sure. But he is clearly an engaged person in terms of both his political style, his personality and his policy-making style. So that was kind of the framing of it. I think that's how we approached it. (McLarty)

In explaining this, McLarty also noted that the operation of "the White House and to some extent the administration... was clearly driven by the campaign. And I think to have dramatically altered that would have created a whole other set of dynamics and problems." (McLarty) A senior official familiar with the Clinton operation added:

Mack had a very untenable situation in that regard and did the best he could with that... his authority was constantly and often inadvertently or indirectly undermined by the President's willingness or indulgence... (to allow individuals who had developed a relationship with him on his campaign to see him). (background interview)

Most other recent presidents have had a very different operating style, which encouraged more staff control over his schedule, speeches, and visitors. This has been the case for all but Carter and Ford. And, like Clinton, Ford rather quickly abandoned the "spokes-of-the-wheel" system of open access for a more structured system with a strong chief, even though the title "chief of staff" was carefully eschewed. He was encouraged to do so by Donald Rumsfeld who accepted President Ford's offer to oversee White House operations only if he be given the authority of a chief of staff. Carter, after trying to do without a chief of staff altogether in the style of his Democratic predecessors, ultimately turned to Hamilton Jordan, then Jack Watson as chief of staff, though neither was what one would call a "strong" chief.

Perhaps the administration of George W. Bush provides as vivid an illustration of the impact of the president's style as any. Bush, the self-styled "decider," is known for the finality of his decisions and his insistence that they be the end of debate on an issue. His White House, as Chief of Staff Josh Bolten put it, "has been blessed all along in having had good internal working relationships, relatively minimal rivalries, and very little factionalism . . ." (Bolten) Former deputy chief Joe Hagin elaborated:

In this White House...you do have those good, healthy debates, and there has been disagreement between the titans of the West Wing. But once the President makes a decision, there has been remarkable unanimity in supporting what the President wants . . . And I think that's about as healthy of a situation as you can have in the West Wing. (Hagin)

However, the Bush 43 White House, like any White House, has had its share of staff rivalry and internecine conflict, though much of it has played out of public view (e.g., McClellan 2008). Staff rivalry and conflict is a challenge that every chief of staff has to grapple with in their job.

### *Guarding the Door to the Oval Office*

A very important aspect of the chief of staff role is to guard the flow of people and paper into the Oval Office. Time is a valuable Presidential commodity. It is up to the chief of staff to help him manage it effectively. "You need to have discipline and order and be discriminating," said James Baker. (J. Baker I)

Limiting access to the Oval Office serves another purpose. It saves the president from his friends and supporters. Presidents are politicians and as such, like to please. What they don't like to do is say "no." Thus an important function of the chief of staff is to protect the president by eliminating or reducing those politically embarrassing situations which put a President on the spot. Sometimes, of course, obstructing access can be carried too far. Donald Regan overly protected Ronald Reagan. The President's friends had to go public to reach him. On the other hand, when H.R. Haldeman kept people out of the Oval Office, he was following Nixon's wishes. According to one insider, Haldeman "was implementing Nixon's instructions faithfully, maybe harshly but doing it... He [Nixon] was a recluse...and did not enjoy the give and take of special pleadings and wouldn't do it." (background interview)

Among the chiefs of staff there was also a consensus that presidents need to be protected from what James Baker called "Oh by the way, decisions," i.e. decisions that are made on the spur of the moment without staff consultation or consideration of consequences. "It's not in anyone's interest," stated Baker, "to get 'oh by the way decisions' as a guy is leaving a meeting." One way to discourage this practice is for Presidents to issue a generic warning at their first cabinet meeting that such practices will be considered out of order and not tolerated. (Baker I)

Because the job of the staff is to run interference for the president, especially when the discussion turns from the prepared agenda, "the chief of staff needs to know what the president is telling people and what they're telling him. You need to have an understanding with him about it." (J. Baker I) In Reagan's case, he regularly informed his staff if he met with anyone without the staff being present. In G.H.W. Bush's case, unless the meeting was listed as private, an aide from the Office of Chief of Staff office would always be in attendance. (Moore) Being with the president also involves traveling with him. Either the chief of staff or a designated deputy should be on all trips away from the White House.

### *Coordinating Presidential Appearances and Statements*

The Office of Chief of Staff must be involved in scheduling the President, which includes long-range (perhaps three months) planning. The chief of staff need not personally be deeply involved, however. For instance, in the first Reagan term, James Baker delegated responsibility for scheduling (along with communications and relations with the First Lady and her office) to deputy Michael Deaver. (Deaver) Similarly, Henson Moore, under Samuel Skinner, had responsibility for scheduling, and also had the speechwriters and the press office reporting to him. But whether it is the chief of staff or a deputy, all these streams – where the President will be, what the President will say, and how attention will be gained for it – must come together.

As gatekeeper, the chief of staff must review all Presidential schedules, briefings, and speeches. Leon Panetta noted, “If it was a low-level speech to a particular group, I would just sometimes review it very quickly but let the people involved with the policy have the largest impact.” But on high-level speeches, such as State of the Union or other major pronouncements, Panetta paid close attention. (Panetta) Much of the friction between him and Dick Morris, Clinton’s political adviser, stemmed from Morris’ penchant for changing speeches that had gone through the chief of staff clearance process. So strongly did Panetta object to this end-running, that he threatened to quit unless it was stopped. And it was. The Wednesday night meetings in the Mansion were used to bring the principals together to debate and hopefully iron-out their differences. Such special-purpose group meetings, regular or *ad hoc*, can be used to supplement the normal staff meetings in planning and integrating the President’s schedule and message.

### *MANAGING INFORMATION AND BROKERING OPINIONS*

In performing the gatekeeper’s role, the chief of staff must function as an honest broker. Practically all of the chiefs and their deputies interviewed considered such a role essential. James Baker was advised by a predecessor: “Be an honest broker. Don’t use the process to impose your policy views on the President.” The President needs to see all sides. He can’t be blindsided. (J. Baker II) Additionally, cabinet members need to know that their position will be fairly represented, especially if they encounter difficulty in presenting it themselves. Mack McLarty noted that former Chiefs he talked with had

(A) pretty high degree of consensus about the honest-broker approach, that the Chief of Staff certainly needed to be viewed by cabinet members and others as someone who would not shape information in a way that would unduly affect the President’s decision making. The cabinet officers and others had the right to expect their information to be fairly presented. (McLarty)

Honest brokerage does not mean having no opinions, or refusing to offer them when asked by the President. It does, however, mean assuring that the decision process will include all relevant points of view, without allowing the agenda or views of the chief of staff to bias or distort that process. (Jones) Nor is it enough to be, in fact, an honest broker. The chief of staff must be *perceived* as such by those seeking access, in person or for their ideas, to the President.

Although chiefs disagreed on how tight personal access to the President should be, there was unanimity that it should be administered fairly with sensitivity to the position of those who wished to gain an audience. As James Baker put it, “You walk around with a target on your chest and on your back. You use up your chits pretty quickly because the job of the chief of staff is to say ‘no’ to people. Everybody wants something from the President, and your job is to say no or say yes, maybe, but.” (J. Baker, I)

Being a good listener is another attribute of the honest brokering function. According to Howard Baker, “There wasn’t a day went by when in a senior staff meeting somebody didn’t point out to me something that I didn’t know about and was not sensitive to. It was an early warning system that worked very well.” (H. Baker)

Perhaps the key element in the role of the broker is the process of soliciting opinions prior to Presidential decisions – a process that also can work in the direction of consensus building. While the primary responsibility for doing this, usually via formal memoranda, falls to the staff secretary, it is a process the chief of staff must monitor. It is the main point at which people will attempt to get access to

the decision process – even to the point of staffers substituting their views for, e.g., a cabinet member's. As Howard Baker's deputy, John Tuck, said:

Well, that's exactly the level of detail where it occurs, in the staffing of the memo that's going to the President, the decision memo with the options describing the discussion, describing the options. And all the fights occur on just exactly that level of detail. We tried not to let that spill up to the President but sometimes the memos were so controversial – and I can only think of one or two where the memo was bigger than it should have been because we just couldn't forge a consensus about what this paper would look like. (Tuck, in H. Baker)

As a broker, the chief of staff is also responsible for Presidential briefings. The regular morning meetings between the president and chief of staff are a time for briefings. But for more formal briefings, involving multiple participants, the chief normally works with other staffers. Panetta described such a process:

Just to give you an example, clearly national security issues where there were decisions related to what was going to happen in Bosnia... (etc.) would go to the President. What I would do is work with the National Security Adviser and basically set up the briefing so they could make their presentation to the President. And, because of the nature of this President usually even on scheduling issues, you'd go in with a schedule. You'd present a proposed schedule to the President but you would let him obviously comment on that as well. (Panetta)

Not only is the chief of staff expected to be an honest broker, but so are his deputies. George W. Bush's deputy chief of staff for policy, Joel Kaplan, expressed it this way:

I try really hard most of the time to be an honest broker because you do spend more time with the president and you have opportunities to catch him for two minutes here or three minutes there, when you're not in a big policy time discussion. It would be demoralizing to your colleagues and his other advisers if they thought that those periods of time were being used to sort of undermine them or come in behind . . . It is more important that the president have in that deputy chief of staff role somebody who views it as their primary responsibility to just make sure that all of the information he needs is getting to him, not being the smartest guy in the room or giving your own opinion. (Kaplan)

### III. ADVISORY ROLES

#### ADVISING THE PRESIDENT ON POLITICS, POLICY, AND MANAGEMENT

Although the chief of staff is first and foremost an honest broker, it is unlikely that a staffer so close to a President would not be called upon as an adviser, as well. This is particularly true in areas of the chief's special interest or competence. Leon Panetta, for example, as a former OMB director, was an adviser on budgetary matters. (Panetta) Mack McLarty, with a background in private business, advised President Clinton on his economic planning. (McLarty)

One important aspect of advising is integrating policy and politics. Most other advisers, inside and outside the White House, specialize in one or the other. But the chief of staff is expected to be conversant with both. James Baker gave an example of this in discussing the advice President Bush received concerning the economy in 1992:

I want to tell you the problem there was not so much that President Bush wasn't listening to (his advisers)... But he was listening to his economic advisers, who were giving him good economic advice – *good economic advice* – but lousy political advice. This, I think, was the fault of the White House staff and organization at the time. They should have been able to see that, while the



economy might not have needed any action... we nevertheless needed an economic or domestic policy agenda around which to coalesce a campaign. (J. Baker II)

More generally, Baker described the Office of Chief of Staff as “the place where policy and politics come together.” (J. Baker I)

### PROTECTING THE PRESIDENT'S INTERESTS

The role of the chief of staff as adviser to the president is inherently problematic, however, since as it has the potential to conflict with the role of honest broker. Nevertheless, the chief of staff is often required to advise, especially when that consists of carrying bad news or disagreement to the president. Others may want to, but often find that they cannot. This falls under the category of protecting the interests of the president. One former chief of staff spoke to this issue:

You've got to have a person who can *tell you what they think*... and it's rare when you're president. Most people come up to me as chief of staff and say I'm going in and tell him it's the dumbest thing I've ever seen and he's simply got to change it. They get in there, slobber all over him, kiss his ring, tell him how wonderful he is, leave and walk out and say, gee, I really told him. I'd say that's the most groveling, sycophantic behavior I've ever seen in my life. And they say, no, I told him... People just simply do not walk in, point their finger at the President and say, look: that's wrong. (background interview)

Henson Moore explained:

It's just something about the Oval Office, there's something about the aura of the power of a president that people just won't say what really needs to be said to a president except a very choice few people who are so close to him and were so close to him before he was president that they can overcome it, or they have such a position of trust and respect held for them by the president that they don't feel intimidated.” (Moore)

“Sam Skinner and I were not that close to the President. We were staff and he listened to us politely, but if his initial instinct was different from mine or Sam's, he'd go with his initial instinct. We didn't have the ability to turn him from that.” (Moore) A factor that aggravated this problem in the Bush 41 White House was the President's decision to keep White House operations separate from the campaign. This effectively kept Skinner, the chief of staff, out of the political loop and greatly limited his overall influence, even with elements of his own staff. (Skinner)

The protection of the president's interests is perhaps most crucial in times of crisis. The Iran-Contra affair in the Reagan administration illustrated what can happen when the advisory system fails to work well. James Baker made that clear:

When [President Reagan] got in trouble was when that system broke down after I left and after Mike Deaver left, particularly. They got him to agree to some things on Iran-Contra and other things that were a mistake. Bill Casey always wanted to go in there and see the President by himself. But as long as the President would tell us, then we could act to either say, “Wait a minute. Do you really want to do this or do you not?” (J. Baker I; see also Deaver)

Mack McLarty also faced a crisis when the Whitewater accusations began to fly. Here, protection of the President's interests had more to do with coping with forces beyond the presidency. He described his approach:

The way you deal with that I think as effectively as you can, and I think we were reasonably good at it, is to really try to segment it and separate it as much as you possibly can and isolate it. You've got to deal with it, but we did set up a task force to deal with it. Therefore, you've got people who are concentrating on this, capable, skilled, dealing with the issues and then that allows, obviously, the agenda to go forward... (McLarty)

Presidents may even need to be protected from themselves. H.R. Haldeman, President Nixon's Chief of Staff, wrote:

I soon realized that this President had to be protected from himself. Time and again I would receive petty vindictive orders... after a Senator made an anti-Vietnam War speech: "Put a 24-hour surveillance on that bastard." And so on and on and on. If I took no action, I would pay for it. The President never let up. He'd be on the intercom buzzing me ten minutes after such an order. . . I'd say "I'm working on it," and delay and delay until Nixon would one day comment, with a sort of half-smile on his face, "I guess you never took action on that, did you?" "No." "Well, I guess it was the best thing . . ." (Haldeman)

### NEGOTIATING WITH THE ENVIRONMENT CONGRESS, THE DEPARTMENTS, AND OTHERS

Chiefs of staff need to get around. They cannot remain closeted in the White House. However, one of the areas of difference among the various chiefs of staff was how much visibility they should personally have. Howard Baker, James Baker, Dick Cheney, and Ken Duberstein all urged the chief of staff to stay in the background and not become the center of attention. James Baker saw it as a function of the chief of staff to keep the press informed of developments, but to do it on background. "That's not leaking, that's spinning," he said. (Baker I) Increasingly, however, chiefs have functioned as spokespersons, negotiators, and occasionally, as go-betweens on key issues. Sununu linked the Bush White House to conservative groups, James Baker to the Republican political establishment in 1992, while McLarty developed and maintained the Clinton administration's contacts with the business community.

A key element of the role of most recent chiefs of staff has been congressional relations. Though the White House has an office that specializes in this, the chief of staff has nonetheless become a major administration spokesman, at least since the emergence of James Baker in that role in the early Reagan years. Prior to that, even a former member of Congress like Donald Rumsfeld did relatively little in that area. (Rumsfeld)

A more common view among more recent chiefs was that of Howard Baker:

I think it's enormously important...for a President to have a good understanding of the Congress and what's going on up there and even perhaps a good relationship. A chief of staff from that setting can help almost always. Leon Panetta helped and I think I helped. (H. Baker)

John Tuck went so far as to say that Baker "became in fact the congressional affairs guy as well as the Chief of Staff" because members trusted him and "knew what he said would be the policy of the administration." (Tuck, in H. Baker) While that will not often be the case, Andrew Card nonetheless estimated that congressional relations is "probably a good 30 per cent of the responsibility" of the Chief of Staff. (Card I)

Another "external" aspect of the chief of staff job is dealing with the press. The chief of staff may be asked to play a public role as spokesperson for the administration on Sunday talk shows and the like. Beyond that, there is much room for a quieter role. As James Baker pointed out:

You have to be willing to background the press. Background, not leak. There's a big difference. But one of the things Cheney told me before I took the job, he said, "Be sure you spend a lot of time with the press giving them your spin, why you're doing these things. Talk to them. But always do it invisibly. (J. Baker, II)

James Baker argued that the "on the record" public presence, attempted by Donald Regan, worked less well because "nobody wanted to hear it from the chief of staff. He wasn't elected. They wanted to hear it from the President." (J. Baker, II)

Leon Panetta met regularly with the press for formal and informal briefings.

You met with the press in the Roosevelt Room to brief them on issues. For example, if we were putting out a budget or putting out a major issue... and you wanted to make sure that the press would give it the kind of emphasis that we wanted, you would do briefings... Then sometimes I

would do a one-on-one briefing with a reporter in the Chief of Staff's office. And it varied depending on what the issue was. I didn't do that for everything. (Panetta)

In the Bush 43 White House, neither Card nor Bolten spent much time in the public spotlight. Media appearances by the chiefs of staff were used with the clear goal of advancing the president's agenda. Observed Bolten about the Sunday political talk show circuit:

I don't do something like that unless I feel that I'm well prepared. My first priority is to manage the staff and respond to the president rather than making a public figure out of myself. If it's to advance the administration's agenda and the communications people come to me and say: 'You're the best spokesman to go out on Sunday on this issue,' I'll of course do it....(Quoted in Patterson 2008: 48).

The chief of staff also may become involved in cabinet relations, though this is likely to be a smaller part of the job. The White House normally has a cabinet secretary to handle most of the load. Indeed, a veteran of the office noted that "there is natural tension between the chief of staff and a cabinet." Presidents have varied in whether they have given the Chief of Staff cabinet rank. The same official's take on that was "I don't know that it makes any difference."

Finally, the chief of staff must deal in some ways with interest groups, at least to the extent of scheduling the President for fundraisers. In turn, according to Panetta, the White House must be sensitive to donors:

These are the kind of big players who are always around.... They are constantly the people you turn to because they have the money for these events. I think, as a result of that, there is without question a greater sensitivity to the issues that they are involved with... .Now, does it control policy, which is the major question in the minds of the American people? Does it control policy? Not necessarily but it sure as hell has an impact as far as decision that are made. It is a factor and it is a growing factor. (Panetta)

Panetta reported that he did feel obligated to meet with and listen to such people. (Panetta)

## **IV. PERSONAL STYLES AND ATTRIBUTES**

### THE VARIETY OF APPROACHES AND PEOPLE

Both presidents and chiefs of staff come from a variety of backgrounds, display a diversity of personal strengths, weaknesses, and operating styles, and encounter widely differing circumstances during their time in the White House.

Much of the advice relevant to this mix of factors is embedded in what has gone before. Certainly the key is for the chief of staff to adapt to the style of the president. The hands-on approach of Jimmy Carter or Bill Clinton certainly required a different form of staff support than the hands-off approach of Ronald Reagan. (Butler; McLarty; Baker I). Likewise, the temperament of the chief executive requires adjustments. The essential factor, perhaps, is achieving the trust of the President. Leon Panetta stated that:

The first and foremost quality that is essential is trust. You've got to have their trust. To some extent, you have to build that trust because you're just going in to a job, you have to prove yourself. But, ultimately, if you have that trust and you develop that trust, you can do the job. (Panetta)

One also needs to adapt to the various other prominent actors in the White House. In recent administrations, that has clearly included the vice president. Mack McLarty stressed the importance of the vice president:

Another concept I felt strongly about that was not necessarily echoed from the other chiefs of staff (with whom he spoke) was that the vice president be integrated into the Office of the President. Clinton and Gore clearly ran as a team; the vice president was someone of real standing, a strong personality. And the President's wishes were to have Vice President Gore as an integral part of the team... to keep the Vice President in the information flow and in important meetings... and also have certain areas where he or she would have direct responsibility... (McLarty)

Leon Panetta elaborated upon the importance of the First Lady:

I think, if there's anything that is probably as common a trend in the White House as Presidents who don't want to offend people, it's that they have very tough first ladies who have been through a lot of the battles and just by the nature of what they've gone through are very strong individuals. (Panetta)

Panetta developed a weekly briefing session for Hillary Clinton for the first six or eight months of his tenure as chief of staff. After that, the necessary trust having been established, the meetings "kind of faded away." (Panetta) Similarly, in the Reagan White House, part of Michael Deaver's value as deputy chief of staff lay in the confidence that Nancy Reagan placed in him. (Deaver) When Deaver left, Donald Regan was unable to establish such a relationship, which helped lead to his downfall.

Chiefs of staff have come from very different backgrounds. Washington savvy, as noted above, is a desirable trait regardless of background. But there was at least a suggestion that people who have been top decision-makers have a harder time adjusting to the staff role than others do, as both Governor Sununu and Treasury Secretary (and former Merrill Lynch CEO) Regan discovered. A former official noted, "I think the most difficult thing for a governor to make the change to becoming a chief of staff is that a governor is a principal and a Chief of Staff is staff. You must realize that the spotlight is not supposed to be shining on me; it is supposed to be shining on the other guy." (background interview) Marlin Fitzwater, who served under Reagan and Bush, uttered a similar refrain: "In the end every chief of staff is a servant of the President, and the more independence they ask for or try to carve out for themselves, the more likely they are to fail." (Fitzwater)

Regardless of background, one final piece of people-oriented advice from James Baker, reiterating advice noted above, would seem to apply to all who would be Chief of Staff:

One very important rule in Washington generally is to surround yourself with the best people you can get. People who are so insecure that they are not willing to put really good people in as their deputies don't succeed. If they're worried so much about their *own* visibility or public persona that they're not going to put somebody strong in, then they're going to fail. (J. Baker, I)

### "YOU ARE NOT THE PRESIDENT"

James Baker, Ken Duberstein, and others reiterate the importance of the chief never forgetting the staff component of his title. Remember you are staff, not elected or appointed by the President and confirmed by the Senate. "The chief of staff has the second most powerful job in government but it's staff. The minute you forget that you're in trouble." (Baker I) In another interview, Baker repeated much the same warning, "You're really powerful but every bit of that power is derivative from the President. The minute you forget that you get in trouble. And it would be totally inappropriate to call a committee chairman and say, 'Come down to my office to negotiate.' Sometimes they might want to. If one of them wanted to come down, that's fine. You do that. But generally speaking, I went up there and I spent a lot of time up there." (J. Baker II)

Duberstein made the point with a story of a "crusty Democratic congressman" who once said to him,

"Duberstein, you're smarter than 95 per cent of the SOB's up here. You know it and we know it. But what you have to remember is we're elected and you ain't." One of the best pieces of advice I ever got. (Duberstein)

Not only must chiefs of staff keep their own egos in check, but they must be sensitive to the egos and interests of others who work in the White House. Long hours, constant pressures, and personal ambitions, can produce dysfunctional behavior that undercuts a team effort. According to Henson Moore:

The hours are very long. The pressure is very great for the president, to have him be successful. The warfare and backstabbing is more acute there than I ever saw in the department or ever saw in the Congress. If something goes wrong, you don't want to be blamed for it; you want to put the blame on somebody else. You want to have an exit strategy that you leave as a hero not as a dog." (Moore)

McLarty's deputy, Roy Neel, offered a similar warning:

The White House... nurtures junkies who grow to feel like they have to have this rush of the daily pressures and the high stakes stuff. That can be good for a while but it does burn people out. Someone has to be there to evaluate when someone has burned out. You can't leave it to the individuals to decide when they've lost their effectiveness." (Neel)

## **V. DEVELOPING A DAILY SCHEDULE**

### COMPONENTS

The daily schedule of the chief of staff can best be seen as having four components. The first and primary component is to ensure that the president's daily schedule accomplishes what the President needs at that point in time. Every meeting the president has is discussed with the chief of staff before it is put on the schedule. The chief of staff reviews the president's daily schedule with his staff to check if any changes or modifications are needed.

And as noted previously, when the schedule calls for presidential travel, as it often will, either the chief of Staff or a member of the chief's staff will almost always be a part of the traveling party, performing the kind of coordination on the road that the chief of staff must provide in the White House itself. (Skinner) The second component of the daily schedule of the chief of staff is to ensure that every speech the President makes or position the White House takes is consistent with broad Presidential themes. Every policy that moves through the White House has to be cleared by the chief of staff. The third component of the daily schedule is representing the President in meetings with members of Congress, the departments, or constituent groups. The chief of staff has the authority to negotiate on behalf of the President within certain boundaries. In summary, the chief of staff is the trainmaster of the White House. He has to make sure the trains run on time, (Card I) but the chief of staff also needs to make sure they don't collide. If the chief of staff does not personally oversee all of this activity, a designated deputy must be given both the responsibility and the authority.

### DAILY ROUTINE

There is a clear rhythm in all administrations. The morning meetings of the chief of staff begin with a small group of top staff within the chief's office and then move to a larger meeting that includes all senior staff, and finally to a private meeting between the chief and the President - all by 9:00 am. The chief may also attend the President's national security briefing which also occurs in the early morning. In the occasional instance where this pattern has not been faithfully followed, problems have arisen. Samuel Skinner, for instance, notes that this was not always the case during his term as chief of staff, but advises that it ought to be. (Skinner)

The White House day generally begins at 7:00am with a meeting which includes the deputy chiefs of staff, and perhaps the press secretary and congressional liaison. In the Bush administration, OMB director

Richard Darman often attended. Overnight issues such as national emergencies, economic reports, or intelligence materials (Brady) are addressed here. The 7:00am discussion provides a framework for the larger meeting of senior staff at 7:30 or 8:00am. The senior staff meeting includes top White House aides, most of whom carry the designation "Assistant to the President". This group, which tends to be 10-15 in number, is overseen by the chief of staff. There is a sense throughout the various administrations that only senior staff should attend, not their designees. The senior staff meetings usually begin with a discussion of the schedule of the president's day (Brady).

After the senior staff meet, the chief of staff meets alone with the president (usually at 8:30 or 9:00), depending on the president's personal schedule. At this meeting the president is briefed on his schedule for the day, issues in Congress, and other matters that emerged in the senior staff meeting earlier.

Some variations on the daily schedule of the chief of staff involve the re-election process when the chief of staff might meet in the evenings with campaign staff, budget negotiations and other dealings with members of Congress, and national crises.

## VI. CONCLUSION AND RECOMMENDATIONS

The tasks of the chief of staff are many, varied, subtle and critically important to the success of a presidency. While there can be no simple prescription for doing the job right, certain principles do emerge from the experiences of those who have held the position. Very briefly summarized, they are:

### *GAIN CONTROL*

The White House is large and complex, and its responses to events must often be immediate. This is not an environment conducive to lengthy discussion or loose management. Successful chiefs have been “strong” ones, but not self-interested or autocratic.

### *ADAPT TO THE STYLISTIC PREFERENCES & NEEDS OF THE PRESIDENT*

Just as presidents differ, optimal approaches to working with them will also. Nothing is more important to remember than that the power of the chief of staff derives only from the President. A chief who forgets this precept, who acts as if he were President, will get into trouble sooner or later.

### *PROTECT THE PRESIDENT*

Adjusting to the presidential style does not preclude compensating for presidential weaknesses. H.R. Haldeman’s well-known tales of the presidential orders he did not carry out serve as a lesson and a warning for any chief of staff. (Jones) Above all, help the president avoid making what James Baker calls “oh, by the way” decisions, where commitments are made without sufficient staffing or thoughtful consideration. (J. Baker, I)

### *CHOOSE BRIGHT, TRUSTWORTHY, & LOYAL SUBORDINATES*

Be willing to delegate work to them knowing that the task will get done as it should.

### *BE AN HONEST BROKER*

Arguably, this is the most important point of all.

### *RUN A LEAN SHOP, BE FLEXIBLE, & ESTABLISH A RHYTHM*

Under most circumstances, keep the Office of Chief of Staff office itself relatively lean, to keep the management challenges of that office reasonable. Be sensitive for the need of informal, fluid, often temporary organizational devices (regular meetings, war rooms, etc.) to cope with particular problems and opportunities. In addition to establishing clear rhythms for normal presidential and White House days, be careful to include in discussions and decisions only those with a need and competence to be there. But be careful at the same time not to create groups that are too unwieldy to accomplish their work.

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# THE WHITE HOUSE TRANSITION PROJECT



## WHERE TO GET HELP

At this time, few in the public and private policy apparatus have anything like the substantial information resources necessary to understand the appointments process, to balance the tension between nominees, those charged with governing, and those charged with protecting them. While many have opinions about reforming the process, few have taken into account all of the forces involved and few have the information resources at their command to find useful, finely tuned reforms.

In the academic community, some research has focused on the confirmation side of the appointments process but its data resources suffer from having only a partial view of the process and, hence, cannot easily assign the right weights to the various forces involved (see McCarty and Razaghian).

Those interested in reform can avail themselves of three useful resources, however. First, the White House Transition Project maintains an analytic capacity associated with its *Nomination Forms Online* software program. Intended to further the development of useful software to assist nominees, WHTP archives hold a detailed assessment of nominee inquiries. Its website, [whitehousetransitionproject.org](http://whitehousetransitionproject.org), contains many of these reports.

Second, the Department of Agriculture maintains a substantial resource in its programming unit, capable of bringing considerable expertise to bear on any project to assist nominees in filing out forms.

Finally, the collective experiences of White House Counsels and White House Directors of Presidential Personnel provide a useful compendium of observations on the demands of the personnel system. Many of these observations appear in the briefing books on these two offices developed in 2000 by the White House Transition Project and available through its website, [whitehousetransitionproject.org](http://whitehousetransitionproject.org) and its publication *The White House World*.



# THE WHITE HOUSE TRANSITION PROJECT



## WHAT WHTP DOES

The White House Transition Project unites the efforts of academic institutions with those of the policy community and private philanthropy into a consortium dedicated to smoothing the transfer of governing essential to a functioning American republic. It manages two related programs, one on institutional memory and best practices and one on presidential appointments. In both programs, the White House Transition Project brings to bear the considerable analytic resources of the world-wide academic community interested in the viability of democratic institutions on those problems identified as critical by those experienced hands who have held the unique responsibilities for governing. As such, the White House Transition Project brings ideas to bear on action.

### *The White House Interview Program*

A common problem of the democratic transfer of power, the White House has no mechanism for maintaining an “institutional memory” of best practices, of common mistakes, and needed background information. Partisanship and growing complexity of the selection process exacerbate the natural tendency to avoid passing from one administration to the next the vital experiences necessary to carry on governing from one administration to the next. The lack of an institutional memory, then, literally turns the hallmark of the American constitutional system, its peaceful transfer of power, into a breathe-taking gamble. The White House Interview Program bridges the gaps between partisanship and experience by providing a conduit for those who have borne the extraordinary responsibilities to pass on their judgments to those who will enter the American nerve center. Its briefing materials compile these lessons from the practitioners with the long-view of academics familiar with executive organizations and operational dynamics. Provided to the transition planners for the national presidential campaigns and then to the president-elect’s newly appointed management team, these materials provide a range of useful perspectives from those who have held the same positions and faced the same problems that they cannot get on their own or from government resources.

### *Nomination Forms Online Program*

Detailing the complex problems involved in nominating and then confirming presidential appointments, the WHTP’s Nomination Forms Online program provides the best available expertise on the nomination and confirmation process. Its software, *NFO*, constitutes the only fully-functional, open-architecture, completely reusable software for making sense of the morass of government questions that assail presidential nominees. In one place, this software presents nominees with all of the some 6,000 questions they may confront. Provided free as a public service by WHTP, *NFO* prompts nominees for needed information and then distributes and customizes answers to all of the forms and into all the questions that the nominee must answer on a subject.

## HOW TO HELP SMOOTH THE NEXT PRESIDENTIAL TRANSITION

Originally funded by grants from the Pew Charitable Trusts, WHTP manages its operations with the help of private philanthropy. To assist in that effort, please contact WHTP at [WHTP@unc.edu](mailto:WHTP@unc.edu).