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April 1983

OFFICE OF PUBLIC LIAISON

Tracking System

Correspondence Tracking Worksheet

Letters addressed to FRW or OPL will be tracked on the attached White House Correspondence Tracking Worksheet. Information will be filled out on name of Correspondent, Subject, Route To, Action Code and Tracking Date. Action Codes are explained in first box.

After action has been completed on the letter, staff should:

- Indicate type of response, code and completion date.
(See second and third boxes for explanation of codes.)
- Call Central Reference, Ext. 2590, with ID Number assigned at top of page, and close out.
- Central Reference will ask for disposition and if a letter was generated ask that you return the original letter and a copy of your response. (Room # 75)
- If work has been completed by your office, and you staff out to a second party, so indicate under Route To, Action Code, and Tracking Date you assigned and give to second party..
- Even though you have staffed out this worksheet, you must inform Central Reference of the action taken.
- Your name will then be omitted from the outstanding summary report of correspondence and the staff person you assigned the worksheet will then have responsibility for the action.

This tracking worksheet generates a daily report of a summary of the correspondence received for FRW's review each day.

Additionally, each Monday you will receive a summary of outstanding correspondence assigned to you with a due date. Central Reference automatically assigns a due date fifteen days from the tracking date unless a due date was assigned originally.

Staffing Memorandum

When Presidential mail is received from Correspondence for action, the White House Staffing Memorandum sheet will be used to staff this work out. The same procedure is to be used as above. Central Reference must be notified when action is completed or in the alternative, you should send a copy of the action taken for Central Files.

Memos received from Senior White House Officials, or directly from FRW, or Speakers Requests, etc. will also have a staffing memorandum attached. Central Reference will automatically assign a document number.

A summary sheet will be provided FRW each day of the staffing memorandum and you will be given a summary of outstanding staffing memos each Monday.

These procedures do not eliminate the need to process all correspondence or memos thru Jonathan Vipond. The same procedure is still in effect.

Correspondence:

Letters submitted for FRW's signature should be:

- ° to the point - responsive to the issues(s) raised in the original correspondence
- ° factually correct
- ° succinct - usually not more than two pages
- ° grammatically correct
- ° properly addressed - correct title of addressee, etc.
- ° typed in final form, free of typographical errors.
- ° copy of letter attached
- ° reference initials of the person generating the response and typist initials

ASSIGNMENT FROM THE OFFICE OF PUBLIC LIAISON

PREPARATION OF BRIEFING MATERIALS

DATE:

DUE BY:

TO:

FROM:

In order to prepare Faith Ryan Whittlesey for:

Please submit the following briefing materials:

_____ Issue(s) Summary
_____ Background Profile on Event
_____ Personal Profile on _____
_____ Organizational Profile on _____
_____ Community Profile on _____
_____ Talking Points: _____
_____ Questions and Answers _____
_____ Action Memorandum on _____
_____ Information Memorandum on _____
_____ Other _____

SPECIAL INSTRUCTIONS:

Please return material to Jonathan Vipond, Room 128, by time and date indicated above.

INSTRUCTIONS

1. Issue(s) Summary (no more than two-three pages)
 - ° An itemized list of the important issues likely to be raised in the meeting, with a succinct paragraph explaining each, identifying the various perspectives of the key people present, and suggesting an appropriate response by FRW (issues should be raised in descending order of priority).
2. Background Profile on Event (no more than two pages)
 - ° Briefly summarize the purpose of the event, the key participants and the number of people who will be attending.
 - ° A format/schedule for the entire event should be included indicating specifically what FRW is expected to do and when.
3. Personal Profile (no more than one page)
 - ° One paragraph summary of the key points about the individual's career and interests.
 - ° Indicate probable topics individual will raise with FRW and/or suggested responses.
4. Organizational Profile (no more than one page plus attached list)
 - ° Name, purpose, membership composition and size
 - ° Principal individuals to be present and their offices in the organization. (A separate list of key officers and staff may be attached).
 - ° Indicate issues of particular concern and/or suggested response.
5. Community Profile (no more than two pages)
 - ° Brief summary of key characteristics of this community, if known.
 - ° Major issues in State/region/city as indicated.
6. Talking Points (no more than two pages)
 - ° Suggest specific remarks for FRW to make. Put points in descending order of priority.

7. Questions and Answers

- Frame the questions that FRW is likely to be asked.
- Suggest brief answers or responses to each.

BRIEFING INFORMATION FOR FRW

ISSUES SUMMARY

(name of office)

ISSUE: Brief statement of issue.
Succinct paragraph describing program issue likely to be of concern to groups with which FRW is meeting, or to states being visited. For both trips and meetings in Washington, include background on the particular perspectives of key individuals.

RESPONSE: Action taken thus far by OPL in response to issue, if any. Recommended response for FRW.

ORGANIZATIONAL PROFILE

NAME OF ORGANIZATION: _____

SUMMARY: Brief summary of the organization, including such information as:

- ° History (when organization was founded, by whom, for what purpose).
- ° Description/purpose of organization
- ° Principle activities
- ° Membership composition and size
- ° Internal governing process
- ° Source of funds

Also include (as a separate attachment, if so desired list of principle individuals and their offices in the organization.

PERSONAL PROFILE

NAME: _____

BIOGRAPHICAL SKETCH: One paragraph summary of the key points
about the individual including: _____

- ° Title and relationship with organization which FRW is addressing.
- ° Present occupation
- ° Career history
- ° Interests (If appropriate, include probable topics individual will raise with FRW and suggested response.
- ° Other pertinent matters.

BACKGROUND PROFILE ON EVENT

EVENT: _____

NAME OF ORGANIZATION: _____

DATE OF EVENT: _____

PLACE/TIME: _____

FRW IS REQUESTED TO: _____

SUMMARY: Prepare a brief paragraph summarizing the event,
including:

- ° Purpose and description of event-include special activities (i.e., awards, etc.) and highlights of past events and speakers, if appropriate.
- ° Number and type of people in attendance.
- ° Key individuals attending.
- ° Media in attendance.
- ° Schedule for event (this may be separate attachment)
- ° Materials for event, if any.

COMMUNITY PROFILE

NAME: _____

SUMMARY: Brief summary of the key characteristics of the community, including:

- Community leaders
- Population description
- Characteristics of the community
- Major issues of concern to community

Anthony Blackwell

THE WHITE HOUSE
WASHINGTON
August 20, 1982

MEMORANDUM FOR WHITE HOUSE STAFF

FROM: RICHARD G. DARMAN *[Signature]*
SUBJECT: Guidelines for Special Presidential Messages

Attached for your information and use are Guidelines for Presidential Messages.

The guidelines note what messages and letters may be sent out over the President's signature to recognize various special occasions, events, and circumstances.

Presidential messages are handled either in the Office of Special Presidential Messages (SPM) or the Office of White House Correspondence (WHC). The guidelines also note the types of messages and letters for which each of these offices is responsible.

Dodie Livingston, Special Assistant to the President, is Director of the Office of Special Presidential Messages (SPM). She can be reached at x2941, Room 480-OEOB.

Anne Higgins, Special Assistant to the President, is Director of the Office of White House Correspondence (WHC). She can be reached at x7610, Room 94-OEOB.

If you have questions, please call their offices.

[Handwritten mark]

GUIDELINES FOR SPECIAL PRESIDENTIAL MESSAGES

It is traditional that Presidential Messages be issued over the President's signature to recognize various special occasions, events, and circumstances.

These Guidelines reflect traditional practices dating back through several previous Administrations as well as new program initiatives undertaken by the Reagan Administration. Their purpose is to clarify what messages may be authorized, to assure there is no unnecessary duplication of effort, and to maintain proper standards for messages. As in all matters involving the use of the President's name, no message should be promised before it has been approved.

Two White House offices -- the Office of Special Presidential Messages (SPM) and the Office of White House Correspondence (WHC) -- have operational responsibility for the issuance of Presidential Messages.

In most instances, the Office of Special Presidential Messages (SPM) handles messages for public events while the Office of White House Correspondence (WHC) handles messages for individuals. However, for your convenience, the acronyms (SPM) and (WHC) will identify which office processes the messages explained in the categories that follow:

1. MESSAGES OVER THE PRESIDENT'S SIGNATURE USUALLY WILL BE LIMITED TO:

- a. Major national conventions, annual meetings, or events of significant national organizations. These include fraternal, religious, trade, ethnic, historical, military, educational, and other groups. Local, state, or regional branches or chapters of these organizations normally do not qualify. (SPM)
- b. Commemorative events. Certain annual observances that are not accorded Proclamations are recognized with a Presidential Message. These observances must be on a national scale. They include Black History Month; Crime Prevention, Brotherhood, Library, and Secretaries Weeks; and Lincoln's Birthday, St. Patrick's Day, etc. (SPM)
- c. Political/Congressional events. These are handled case by case in accord with guidelines jointly applied by the Office of Legislative Affairs, the Office of Political Affairs, and the Office of Special Presidential Messages. (SPM)

- d. Tributes to outstanding national figures. (SPM)
- e. Local testimonials when specifically authorized by the President. (SPM)
- f. Significant anniversaries of non-profit service organizations and institutions. (SPM)
- g. Charitable or fundraising events -- only as follows:
The President recognizes certain major fundraising organizations such as the American Red Cross, Cancer Association, etc., at their annual dinners or conventions. Unless the President or Mrs. Reagan or both have specifically endorsed an event, the Office of the President is not to be associated with a specific fundraising event. There is a limited exception to this stringent rule: In certain instances, when an event is consistent with the President's Private Sector Initiatives program, messages may be issued for fundraisers if cleared by the Director of Special Presidential Messages and the Special Assistant to the President for Private Sector Initiatives. (SPM)
- h. Autographed pictures: Available in connection with White House business. (WHC)
- i. Bar/Bath Mitzvahs, ordinations, confirmations, baptisms, etc.: Routine requests receive general religious card. Important members of Congress, White House staff, friends of the White House receive special letters. (WHC)
- j. Birthdays: 100 years and over, form letter; 80-99 years, card; members of Congress, form letter; White House staff, members of Cabinet, more important members of Congress, national celebrities, special letter. (WHC)
- k. Birth of baby: Routine requests, card; members of Congress, friends of the White House, White House staff, special letter. (WHC)
- l. Church, synagogue anniversaries: 50 years and over, form letter; less than 50, general religious occasion card. (WHC)
- m. City, town, county anniversaries: 50 years or more for large cities, form letter; centennials or more of large cities, form letter; centennials or more of small towns, cities, or counties, form letter. (WHC)
- n. Condolence cards and letters: Routine requests, card; friends of the President, firemen killed in the line of duty, etc., special letter. (WHC)
- o. Human interest: Special letters to those deserving of special attention on an individual basis. (WHC)

- p. Newspaper anniversaries: 50 years or more, form letter. (WHC)
- q. Radio station anniversaries: 50 years or more, form letter. (WHC)
- r. Religious anniversaries (nuns, ministers, rabbis, etc.): 35 years or more, form letter. (WHC)
- s. Religious retirements: 50 years or more, form letter. (WHC)
- t. Retirements: 35 years or more, form letter; under 35 years, card; special letters to White House employees, Congressional requests, Uniformed Division of Secret Service, volunteers, etc. (WHC)
- u. Scouting awards: Cards designating specific award. (WHC)
- v. Wedding anniversaries: 60 years or more, form letter, 50 years or more, card; special letters to members of Congress, friends of the White House, etc. (WHC)

2. THE FOLLOWING GENERALLY WILL NOT QUALIFY FOR MESSAGES

- a. Events of a commercial nature or events sponsored by a profit-making organization.
- b. Local testimonials (unless the individual is known by the President).
- c. Tributes to members of the Judiciary (other than standard letters on retirement or assumption of "senior status").
- d. Tributes to military personnel.
- e. Individuals or groups travelling abroad in an unofficial capacity or those who are not specifically authorized to speak for the President -- except as may be specifically approved by the National Security Adviser.
- f. Events sponsored by licensing bodies or local authorities.
- g. Ceremonies conferring honorary degrees.
- h. Presentation ceremonies, tributes, or awards to U.S. citizens by foreign governments or their consular services.

3. APPEAL PROCESS: If a staff member believes that an event or person not qualifying under these policies should receive a message with the President's signature, he or she should

consult with the Office of Special Presidential Messages or the Office of White House Correspondence -- whichever is applicable -- on the question. If not satisfied, he should pursue his inquiry through appropriate Senior Staff channels.

4. TIMING: Message requests should reach either the Office of Special Presidential Messages or the Office of White House Correspondence at least ten days ahead of the due date to allow time for research, preparation, and clearances. The staffs of both offices do their best to accommodate emergencies but cannot always guarantee delivery of messages to distant points without sufficient notice. When in doubt about timing, please consult the appropriate office.
5. SUGGESTIONS: The Office of Special Presidential Messages and the Office of White House Correspondence welcome background information and/or suggestions on the content and tone of messages when staff members have particular insights or information on the subject.