

THE WHITE HOUSE TRANSITION PROJECT



REPORTS

2009-03

THE WHITE HOUSE OFFICE
OF PUBLIC LIAISON

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To an unusual degree, the contest for the 2008 presidential nominations highlighted the relationships between candidates, lobbyists and political action committees. Barack Obama resolutely refused to accept contributions from lobbyists and PACs, a policy adopted by the Democratic National Committee after Obama became the party's presumptive nominee. The media closely scrutinized John McCain's past and present relationships with lobbyists, and several prominent aides were forced to sever ties with the campaign while others continued on amidst controversy. Hillary Clinton dismissed a leading campaign strategist over a policy conflict between her official campaign positions and one of his lobbying clients. Major candidates also deemed it important to assert their ability to rise above narrow group interests. In the post-World War II era, most presidential candidates and all eventual winners have portrayed themselves as representatives of the American people, as the tribune of the public's collective interests, not as the representative of any segment's interests or even those of the victorious coalition.¹ Such a claim was critical for both Obama and Clinton to assert in order to overcome the possible perception that their historic candidacies would lead them to represent the interests of a single segment of the American public, blacks or women. In addition, Obama, Edwards and McCain consistently presented themselves as champions of a new politics that would change Washington and marshal power in service of the public's interests rather than those of the special interests.

Amidst such heightened media sensitivity and widespread appeals to national unity, some might wonder why any future White House would want to establish an office dedicated to working with interest groups. But **public liaison**, has been a persistent, clearly identified White House staff specialization since the Ford administration, and experience suggests the next president will need to establish a way to oversee interest group relationships even if it would be unwise to give them high visibility.

¹ Barbara Hinckley, *The Symbolic Presidency: How Presidents Portray Themselves* (New York: Routledge, 1990) Chapter Two.

ORIGINS OF PUBLIC LIAISON

The Nixon White House was the first to formalize a set of staff responsibilities to work with interest groups that had been unsystematically scattered among staff members during the presidencies of Franklin D. Roosevelt through Lyndon B. Johnson. The title “public liaison,” however, officially emerged in the Ford administration. Of course, interest groups pressed their issues onto presidents even earlier in American history, but several factors conspired to encourage the creation of a White House staff for interest group liaison.

The growth in federal programs during and after the New Deal era was accompanied by a surge in group representation in Washington, D.C., particularly marked during the 1960s and 1970s.² In addition to the wide range of civil rights groups seeking to advance the opportunities of African-Americans, women, seniors and Hispanics, citizen groups arose to represent the interests of consumers, environmentalists, and the physically disabled. The result was a transformed interest group universe that had been dominated to that time by more traditional corporate, professional and occupational interests. Simultaneous improvements in communication made it possible for group leaders to maintain contact with members in ways that had never before been available, producing a lobbying community using increasingly sophisticated techniques. At the same time, Congress became a more complex institution; party discipline declined and power was decentralized. As a result, it was imperative that presidents find a way to respond systematically to group requests and, in turn, enlist groups behind administration priorities that could no longer be advanced by simply negotiating with a few powerful party leaders. The White House specialists in legislative affairs/congressional relations had once sought to coordinate group lobbying campaigns, but as the interest group picture grew more complex, so did the job of working with Congress. Thus, the Office of Public Liaison was created and has continued in each administration since Ford though not always with the same status or degree of staff autonomy.

For most of American history, groups focused their attention and lobbying efforts on Congress and on the bureaucratic agencies responsible for the programs most directly affecting them. Creating many of those agencies, in fact, had been the goal of groups’ legislative efforts—the Departments of Agriculture, Labor, Commerce and Interior are examples. Those connections have not disappeared in the modern era, but as the modern presidency assumed new responsibilities in guiding the economy and for initiating programs, developments usually associated with the Roosevelt-Truman era, it became clear that the White House was a critical center of decision making for groups to influence. Ultimately, both organized groups and presidents drew benefits from creating a staff unit that would oversee these relationships.³

Starting with FDR, White House aides maintained connections with groups associated with their general responsibilities⁴ or with groups reflecting their own backgrounds or interests. To name a few examples, David Niles became FDR and Truman’s link with Jewish-Americans, his co-religionists; Phileo Nash was a contact for Indian tribes, arising from his training as an anthropologist and work experience in the Bureau of Indian Affairs;⁵ Jonathan Daniels, a progressive North

² Thomas L. Gais, Mark A. Peterson and Jack L. Walker, “Interest Groups, Iron Triangles and Representative Institutions in American National Government,” *British Journal of Political Science* 14:2 (April 1984) 161-185.

³ Joseph A. Pika, “Interest Groups: A Doubly-Dynamic Relationship,” in *Presidential Policymaking: An End of the Century Assessment* ed. Steven A. Shull (Armonk, NY: M.E. Sharpe, 1999) 59-78; and Joseph A. Pika, “Opening Doors for Kindred Souls: The White House Office of Public Liaison,” in *Interest Group Politics*, 3rd ed., ed. Allan J. Cigler and Burdett A. Loomis (Washington, D.C.: CQ Press, 1991) 277-298.

⁴ Of course, FDR’s staff members were primarily generalists, not specialists.

⁵ Joseph A. Pika, *Political Science Quarterly*, Vol. 102, No. 4 (Winter, 1987-1988), pp. 647-668.

Carolynian, headed the “minorities office” that oversaw race relations for FDR,⁶ and Philleo Nash did the same for Truman not because of their racial identity (neither was black) but because of their staff assignments. Bernard Shanley, who stood out amidst a predominantly Protestant staff, was Eisenhower’s link to Catholics, a part-time role that Ralph Dungan played during the Kennedy administration where there were many more Catholics on the staff. George Reedy, best known as LBJ’s press secretary, also worked with organized labor, but so did Harry McPherson, John Roche and others, a product of their pre-White House political careers and a reflection of how closely the administration’s interests were linked with those of the unions.

During the pre-Nixon period, then, liaison was not a full-time, sustained, formal assignment. Staff members assumed liaison responsibilities as the White House figured out who might have enough personal knowledge to deal with issues as they arose. Frequently, presidents turned to appointees elsewhere in the executive branch or officials in the Democratic or Republican parties to work with important groups. The major exception during this pre-Nixon period was David Niles, who at various times served as the contact in the Roosevelt and Truman White Houses for organized labor, blacks, and nationality groups as well as Jewish organizations. Niles’s broader liaison responsibilities suggest how his position was the precursor of both OPL and Political Affairs which emerged as White House specializations decades later.

During this early period, simply sharing a group’s characteristics or having experience did not ensure that a White House aide would serve as a conduit for information and advice as an administration formulated policy. A prime example is E. Fred Morrow, the first black appointed to a professional White House position, whose memoir makes his ambivalent feelings clear. On the one hand, he did not want to be pigeon-holed as the White House civil rights person, but at the same time, when civil rights issues assumed greater prominence, he felt enormously frustrated at being left outside the president’s decision making on critical issues about which he had strong feelings.⁷ For most of the Eisenhower years, Max Rabb handled civil rights issues as well as liaison with labor and Jewish groups.

FORMALIZING PUBLIC LIAISON: RICHARD NIXON, GERALD FORD, AND JIMMY CARTER

President Richard M. Nixon

At the outset of his first term, Nixon’s White House followed the pattern of earlier administrations: many staff members assumed liaison responsibilities as part of their other assignments. For example, Peter Flanigan oversaw economic and financial issues, and his staff of five maintained close relationships with a broad range of business groups; Leonard Garment, Nixon’s chief counsel, worked with Jewish groups as well as the elderly and handled many civil rights issues; Pat Buchanan was the link to Roman Catholics; liaison with women was assumed by Anne Armstrong and Patricia Lindh when they joined the staff; although the administration reversed a number of Democratic civil rights policies, African-Americans on the staff (Robert Brown, Stanley Scott) maintained regular liaison with blacks, much as LBJ had done later in his administration (Hobart Taylor, Clifford Alexander).

The exception to this pattern of occasional liaison was Charles Colson. Originally hired to support congressional relations, Colson’s responsibilities became wide-ranging and included special assignments from the president such as the “dirty tricks” undertaken during the 1970 and 1972

⁶ Jonathan Daniels, *White House Witness, 1942-1945* (Garden City: Doubleday, 1975).

⁷ E. Frederic Morrow, *Black Man in the White House*. Coward-McCann, 1963. Also see the discussion in Charles E. Walcott and Karen M. Hult, *Governing the White House: From Hoover through LBJ* (Lawrence: University Press of Kansas, 1995) 124.

campaigns. However, Colson's most sustained task was to maintain positive relations with organized groups potentially supportive of the administration's policy and political goals. Colson's shop grew during the first term and included an impressive range of interest group liaison assignments. Business and organized labor dominated in the early years but as the staff expanded members were added to deal with Hispanics, youth, senior citizens, veterans, and white ethnics.⁸ In many ways, Colson was a pioneer in using these connections to advance the administration's program by coordinating congressional relations, the administration's media message, and interest group support at critical points. When Colson left the staff in late 1972, Bill Baroody took over his position and ultimately proposed that the interest group efforts be redirected and retitled, but no action was taken until Ford assumed office.

President Gerald R. Ford

Living down the Colson years' reputation as the "office of dirty tricks," was an important goal of William J. Baroody, the urbane architect of the new Office of Public Liaison under Gerald Ford. Rather than being an instrument to push aggressively for passage of the president's program through strong-arm tactics, OPL became an instrument for projecting the image of a truly open administration (in contrast to Nixon's) and to secure Ford's reelection. Under Baroody's direction, the office incorporated outreach efforts with consumers and women that had been located elsewhere in the White House, and the overall staff grew to approximately thirty.⁹ At the core of its activities was an aggressive campaign of regional conferences that enabled the nation's first un-elected president to tour the country in a campaign-like atmosphere and prepare the way for an eventual re-election campaign. In Washington, D.C., Baroody also coordinated an extensive series of White House briefings for group and association leaders on a variety of policy topics that brought together group leaders and administration policy-makers. Baroody reported to Jack Marsh, a former Democratic congressman who served as Counselor to the President and primarily emphasized his responsibilities in the Office of Congressional Relations.

President Jimmy Carter

The new OPL staff unit survived the inter-party Ford-Carter transition, but Carter's group liaison efforts extended well beyond OPL. Midge Costanza headed the Office of Public Liaison until mid-1978, but the White House also included several prominent staff members with liaison responsibilities. Louis Martin, Special Assistant for Black Affairs, was a longtime Democratic party activist on civil rights and continued to work with blacks, doing many of the same things he had done during the Kennedy-Johnson years in the DNC. Nelson Cruikshank, Counselor to the President on Aging, was a retired labor lobbyist instrumental in shaping Social Security and Medicare policy across more than two decades who represented seniors in the Carter White House and worked heavily in those same policy areas. Esther Peterson, Special Assistant for Consumer Affairs, was a similar high-profile representative of consumer interests in the White House not officially located in OPL. Martin, Cruikshank and Peterson were members of the White House senior staff and met regularly with that group.

Costanza headed OPL for about fifteen months, attracting considerable criticism for her alleged abrasiveness and aggressive championing of peripheral causes. Anne Wexler took over most of the office's responsibilities as Assistant for Public Outreach, a slightly different title intended to spare Costanza's feelings who stayed on for a few months to deal with women's issues. Wexler's assignment was much more explicitly connected to pushing for passage of administration priorities

⁸ See the authoritative discussion in Karen M. Hult and Charles E. Walcott, *Empowering the White House: Governance under Nixon, Ford and Carter* (Lawrence: University Press of Kansas, 2004) Chapter Four.

⁹ *Ibid.*, 91.

by enlisting groups in supportive coalitions, using many of the same techniques used in previous administrations—issue briefings large and small, coalition-building with obvious and not so obvious partners (groups who did and did not normally work together), consultation on policy content during the drafting stage of legislation, etc. As Wexler described it shortly after leaving office, OPL under Costanza had functioned as an office providing “responsiveness” to interest groups, a form of White House case work, but had not taken enough initiative to enlist group support by building coalitions that would move the president’s program on Capitol Hill.¹⁰ Responsiveness was critical to success in selling the product; groups wanted to be in on the take-off as well as the landing of legislation,¹¹ the two sides of public liaison. Selling legislation required the administration to create task forces that included representatives from the offices and agencies affected by legislation, working with supporters both in and out of D.C. The administration’s success in selling the Panama Canal treaties became the model for later efforts. OPL also made an extensive effort during the budget writing period, consulting with groups about their priorities during the Thanksgiving-January time-frame when the budget was taking shape. OPL then conducted briefings on the budget after decisions had been reached and still later enlisted groups behind specific legislative initiatives. By the time Wexler left the White House, OPL had created a data base with 39,000 names of group leaders with whom they maintained contact, largely in support of congressional relations.¹²

Costanza’s original responsibilities for liaison with women were assigned in October 1978 to a new Special Assistant for Women’s Affairs, Sarah Weddington,¹³ and her role expanded in 1979 to include liaison with the DNC. Group liaison grew even more broadly as the 1980 election approached. Carter named a Special Assistant to the President for Ethnic Affairs in early 1980 (Stephen Aiello) that supplemented the Office of Hispanic Affairs created in the summer of 1979 (Esteban Torres and five assistants).¹⁴ Edward Sanders joined the White House in mid-1978 to work with the Jewish community.¹⁵ According to Wexler, she had been asked to oversee this expanded staff of group liaisons but had declined in order to maintain her principal responsibility as “the President’s advocate” while the other staffers served as “group advocates.”¹⁶ As Wexler recalled, when a group lacked a White House advocate, OPL attempted to shift the problem outside the White House.

RONALD REAGAN, GEORGE H. W. BUSH, BILL CLINTON

President Ronald W. Reagan

Under President Reagan, Elizabeth Hanford Dole was the initial head of OPL from 1981-83, and started with a modest-sized staff that included one deputy, nine other professional staff members and a total staff of 18, more than twice the size of Wexler’s original staff.¹⁷ Dole had been in charge of the 1980 campaign’s voter group effort, excellent preparation for heading OPL. Dole’s operation consolidated liaison with most of the groups who had remained outside Wexler’s shop in the Carter

¹⁰ Anne Wexler Oral History Interview, Miller Center at University of Virginia, February 12-13, 1981, pp. 3-4. Available at http://webstorage3.mcpa.virginia.edu/poh/transcripts/ohp_1981_0212_wexler.pdf.

¹¹ *Ibid.*, p. 4.

¹² *Ibid.*, p. 6.

¹³ As part of her outreach efforts, Weddington created a monthly newsletter “White House News on Women” mailed out to 14,000 recipients. Sarah Weddington, Oral History Exit Interview, January 2, 1981, conducted by Emily Soapes, available at <http://jimmyccareterlibrary.org/library/exitInt/exitwedd.pdf>.

¹⁴ “Historical Materials in the Jimmy Carter Library,” <http://jimmycarterlibrary.org/library/guide.pdf>.

¹⁵ Hult and Walcott, 100.

¹⁶ Wexler Oral History Interview, p. 24.

¹⁷ *Ibid.*, p. 7.

White House, and the staff continued to grow under Dole who reported directly to the chief of staff. Dole was succeeded as OPL director by Faith Ryan Whittlesey, 1983-1985, later appointed Ambassador to Switzerland; Linda Gerst Chavez, 1985-86; Mari Maseng, 1986-87; and Rebecca Range, 1987-89.¹⁸

Just as Reagan's electoral coalition was different, so too were the office's assignments fine-tuned to reflect this different constellation of political forces. While appointments to work with high-profile minority groups continued (for example, Thelma Duggin with blacks as well as youth and Henry Zuniga with Hispanics), there was now a staff member to work with fundamentalist Christians and veterans groups (Morton Blackwell). In addition to overseeing the office, Elizabeth Dole worked with women; Virginia Knauer initially worked with consumers inside the OPL structure but moved to head a separate unit after Dole left the job; Knauer also worked with seniors. Jack Burgess worked with white ethnics and Catholics, a responsibility he also filled during the 1980 campaign. Dole organized her staff into two divisions headed by Deputy Directors. Jack Burgess oversaw commerce (business and labor) and Diana Lozano headed human services (Blacks, Hispanics, membership groups, consumers, seniors, and women). It was hoped that this structure would reduce the demands on Dole's time and the paper flow that she would be responsible for overseeing. Subsequent directors made modifications to this structure.

Liaison with the Jewish community was unusually prominent for a Republican administration. Jacob Stein, a former president of the Conference of presidents of Major American Jewish Organizations,¹⁹ was appointed Special Assistant to the President for Jewish Affairs within OPL, an important post given the relatively high support Reagan received from Jewish voters in the 1980 election (39%). Stein effectively assumed the role played by Leonard Garment during the Nixon years and worked as emissary to Jewish organizations during a difficult period when U.S. weapons sales to Saudi Arabia were perceived as endangering Israel.²⁰ Because of the sensitive nature of the issues in question, Stein also held positions with the Office of Policy Development and the National Security Council, a higher policy profile than held by most OPL staff members, although similar in scope to that played by Edward Sanders in the Carter administration. After Stein left the White House in early 1982, he was replaced by Michael Gale, formerly a lobbyist with the American Israel Public Affairs Committee (AIPAC) and Deputy Director of the National Jewish Republican Coalition during the 1980 election.

Like the Carter group, Reagan's OPL conducted extensive consultation with groups prior to the State of the Union and submission of the president's budget message. Interaction was especially intense with business groups. Immediately prior to release of the president's budget, D.C. representatives of friendly groups were assembled to give them prior knowledge of the budget details. Reagan's OPL held fewer briefings for large groups (though there were some) and substantially reduced the effort devoted to White House conferences held outside D.C. The emphasis was clearly to build coalitions in support of the president's program—when Congress was out of session the staff's business slowed appreciably. During much of the 1983-1985 period, the

¹⁸ "Key Reagan Administration Officials," <http://www.reagan.utexas.edu/archives/reference/keyofficials.html>.

¹⁹ This organization is described on its website as "the central coordinating body representing 50 national Jewish organizations on issues of national and international concern." <http://www.conferenceofpresidents.org/>

²⁰ For a discussion of Reagan's relations with the Jewish community during a stressful period see Nicholas Laham, *Crossing the Rubicon: Ronald Reagan and U.S. Policy in the Middle East* (Aldershot: Ashgate Publishing, 2004). A December 15, 1981 memo from Stein to Elizabeth Dole reviewed his activities during the first 8 months on the job: four meetings between Reagan and representatives of the Jewish community; three with Vice President Bush; four with members of the cabinet and senior White House staff; 87 meetings with Jewish groups in the White House; more than 20 speeches around the country. Laham, p. 22.

administration unsuccessfully sought to mobilize group support behind the effort to provide funding for the anti-Sandinista Nicaraguan groups known as the “contras.”²¹

In the second Reagan administration, Donald Regan, the new chief of staff, hoped to streamline some reporting lines and considered consolidating several political units under the direction of Max Friedersdorf, formerly Assistant for Legislative Affairs during the first year of the Reagan administration. Friedersdorf returned from a cushy ambassadorial appointment to become Assistant to the President and Legislative Strategy Coordinator. This position was initially conceived to coordinate public liaison, legislative affairs and intergovernmental relations, but a different organizational strategy emerged. Along with Friedersdorf, Regan hired Ed Rollins to manage political affairs and Pat Buchanan to direct communications, both high profile conservatives who were Friedersdorf’s equals. As a result, Friedersdorf stayed only until October 1985 after spending most of his time on congressional issues; OPL’s status became ambiguous when both Friedersdorf and Faith Ryan Whittlesey left the White House. Rollins and Buchanan reportedly battled over the unit’s large number of staff slots and finally agreed to divide the positions between them.²² One account suggests that OPL officially fell under Buchanan’s Communications Office and thereafter largely engaged in outreach to the conservative parts of Reagan’s coalition.²³ By the end of the Reagan administration, OPL staff member were officially performing functions directly associated with communications including speech writing and research as well as media and broadcast relations.²⁴

During most of the later Reagan years, then, OPL was one of several White House units coordinated through the Office of Communications which provided an umbrella to coordinate the efforts of speechwriting, media relations, public affairs, the press office and public liaison, the largest of the sub-units. At its height, OPL reportedly had 38 staff members (another source says 56); because of high turnover at the director level, there was also considerable turnover within the unit overall. Thus, the list of former OPL staff members is extensive—at least 64 are included on the Reagan Library’s finders aid.

President George H. W. Bush

With such a large operation, OPL was almost destined for staff reductions when George H. W. Bush entered office promising to reduce the overall size of the White House staff. Public accounts suggest that the initial Bush operation included only 9 staff members at the administration’s outset, though it is not clear whether this total included only professionals or the total staff.²⁵ Nor was OPL very influential within the White House. Barbara (“Bobbi”) Kilberg served as the office’s director and reported most of the time to David Demarest, director of communications who also oversaw speech writing, media relations and intergovernmental affairs. When Samuel Skinner became Chief of Staff in late 1991, he had an outside consultant conduct an organizational assessment that set off a round of staff shakeups. In addition to several changes on the communications side (the consensus judgment was that Bush’s message was not getting through to the public), Sherrie Rollins (wife of Ed Rollins, the Reagan political insider) joined the staff in January 1992 with responsibilities to oversee both OPL and intergovernmental affairs. Demarest’s responsibilities were reduced substantially.

²¹ Ronal Brownstein, “Reagan Reaches Out for Public Support For CIA Aid to Nicaraguan Insurgents,” *National Journal* (4/13/85) 784-789.

²² Lou Canon, “Reagan’s Staff Changes Tone for Second Term,” *Washington Post* (March 11, 1985) A1.

²³ Mark A. Peterson, “The Presidency and Organized Interests: White House Patterns of Interest Group Liaison,” *American Political Science Review* 86:3 (September 1992) 623.

²⁴ Martha Joynt Kumar, “The Office of Communications,” *Presidential Studies Quarterly* 31:4 (Dec. 2001) 630.

²⁵ Peterson cites Barbara Kilberg as having described her staff’s size as 15. Peterson, “The Presidency and Organized Interests...” p. 623.

Other changes in Bush's OPL were afoot. After a continuing series of conflicts with Christian conservatives, Kilberg was moved in April 1992 to serve as director of intergovernmental affairs and a new OPL director was appointed in her place—Cecile B. Kremer. Earlier in the administration, Kilberg had repeatedly clashed with Doug Wead, the liaison to religious groups (the same Doug Wead who worked with George W. Bush during the 1988 campaign), who was fired in 1990 after he publicly challenged a White House decision to allow gay and lesbian activists to attend a signing ceremony. His departure set off a firestorm of complaints fueled by continuing coverage in the *Washington Times* until Leigh Anne Metzger was named as his replacement in September 1990. But conservatives had not forgotten Kilberg's role, and she was later charged with being a supporter of pro-life women's groups. The situation changed again when Sherrie Rollins's husband accepted (though only for a month) a position in Ross Perot's campaign, the independent candidate running against President Bush. Rather than create continuing media controversy, S. Rollins resigned from her White House position and David Demarest once again emerged as the overseer of both OPL and intergovernmental affairs. For a time at the very end of the administration, Demarest served as director of OPL.

One innovation in Bush's OPL was to include an Asian-American on the staff, Sichan Siv. Siv's life story included an escape from Cambodia during the period of genocide and a journey to the United States where he rose from a taxi driver to a White House staff position. When he left in 1992, he was replaced by Clayton Fong, thereby maintaining the same focus on a new voting constituency.

President Bill Clinton

Clinton's OPL was headed during the first term by Alexis Herman who was later nominated and confirmed as Secretary of Labor at the outset of the second term. She was succeeded as director during the second term by Maria Echaveste, Minyon Moore and Mary Beth Cahill. Herman's staff grew to approximately 16-20 members and, unlike her immediate predecessors in the Reagan II and George H. W. Bush administrations, she seemed to carry more weight in White House circles. Echaveste and Moore also rose in the administration. Echaveste increased her influence and assumed an expanded policy role after becoming White House deputy chief of staff in the final two years of the administration. Moore moved from OPL to become White House director of political affairs in 1999-2000. Cahill later became John Kerry's second campaign manager in 2004. In sum, all four of Clinton's OPL directors were closely linked to the DNC and/or electoral politics: Herman had directed the Democrats' 1992 convention; Echaveste had been National Latino Coordinator in the 1992 Clinton campaign; Moore was an activist/administrator in the Rainbow Coalition; Cahill had served five years as Executive Director of Emily's List before joining the White House. Thus, OPL's close link to political affairs is striking in this administration. That connection posed problems in 1997 when the Senate raised questions about whether Herman's staff had played an active role in campaign fund raising by arranging group meetings with the president, the notorious White House "coffees".²⁶ Herman had also headed an informal group of administration officials that helped design a strategy for mobilizing black support for the president's re-election. Another staff member, Doris Matsui, coordinated a similar group focused on Asian-Americans. Earlier administrations also used the outreach capacity of OPL as a way to create a "campaign in waiting;" thus, Clinton's efforts were variations on established themes.

Election-related activities are only one part of OPL's multiple roles, however. Standing at the intersection of party, groups and policy, the more prominent OPL role has been to mobilize support for the administration's goals between elections. In the course of the 2008 election, the Clinton Library released documents that illustrated the former First Lady's activities during her White House

²⁶ Christopher Drew, "Spotlight on Public Liaison Office," *New York Times* (February 1, 1997)

years. Among those was a memo completed by Alexis Herman and Mike Lux, an OPL assistant, detailing a proposed plan for selling the administration's anticipated health care reform proposal. Dated February 5, 1993, the memo reveals the forethought being given to creating a bill-drafting process that would aid in achieving congressional passage.²⁷ The memo, written early in the administration, is not an account of what transpired, but it does give a good sense of what OPL foresaw as its potential role in what was anticipated to be a difficult process.

Looking ahead, OPL projected itself as the leader in a "targeted outreach strategy," but as unable to do it fully on their own. The collective effort would include "consultation meetings for small groups of organizational representatives" who would provide input into the policy formation process, a process we now know was not followed as the administration opted for a largely secretive task force approach that did not consult broadly.²⁸ OPL's list included segments of the interest group universe that might be expected to have strong interest in any reform proposal: relevant organized health professionals, insurance companies, hospitals, unions, both large and small businesses, single payer advocates, rural health care advocates, and those concerned with health care for women, children and low-income groups. White House briefings conducted with representatives for these groups would seek to build on the "aura" of the White House to sell the administration's views as much as seek their input.

The administration was urged to form interdepartmental teams to work with "five key sectors in the health debate." One would consist of the AMA, the Hospital Association, the Insurance Association and the largest insurance companies. The goal would be to gather "intelligence" from these groups to ensure that not all would oppose the final proposal. Small business was expected to be the most energized opponents and warranted a separate team. Big business and the major associations needed to be enlisted as supporters, so soliciting their ideas would be critical. Single payer advocates, generally supportive of reform, would need to be given concessions and wooed, thus deserving separate attention. Finally, the administration was urged to form a research team targeted on strategically-placed groups with powerful congressional allies whose support was critical to passage. Done well, the authors concluded, success lay ahead. "If we have these five projects well-coordinated, we will go into this fight well prepared to take on the interest groups we need to take on, and it will be very tough to stop us."²⁹

OPL would take the lead in creating a data base on groups interested in health care that would include records on group size, strength by region and congressional district, the groups' policy position, their record of consultation and support for the administration, and contact information for the groups' leadership. None of this was very threatening, though it was the focus of conservatives' criticism of the Clinton legacy when it surfaced during the 2008 election.

Rather than organizing a coalition of supportive groups through the White House, Herman recommended doing it through the DNC, who would form "an independent coalition staffed by the DNC." Clearly, such an effort would be only nominally independent and would serve the president's interests. Herman had served as deputy chairwoman and chief of staff of the Democratic National Committee from 1988-1991 and was well aware that a DNC-staffed effort could hardly be considered "independent," but this would get the job done and keep it arms-length from the White House.³⁰ OPL would assist in orchestrating the campaign of support to be generated by "'inside' and

²⁷ Memo, Alexis Herman and Mike Lux to Mrs. Clinton, "Office of Public Liaison Plan for Health Care Reform Campaign," 5 February 1993. Available online at http://www.judicialwatch.org/files/2007/0108HRHealthcarePublicLiaison_0.pdf.

²⁸ Paul J. Quirk and Joseph Hinchliffe, "Domestic Policy: The Trials of a Centrist Democrat," in eds. Colin Campbell and Bert Rockman, *The Clinton Presidency: First Appraisals* (Chatham: Chatham House, 1996) 262-289.

²⁹ February 5, 1993 memo from Herman to Mrs. Clinton.

³⁰ On Herman's role in the Clinton White House see Gwen Ifill, "Washington at Work; Clinton's 'Ms. Fix-It': A Friendly Link To Black Interests and Big Business," *New York Times* (August 30, 1994) A16.

'outside' surrogates," a group consisting of administration officials who would speak in behalf of health care reform and allies outside the administration who would do likewise. These efforts would be targeted on "top-tier [media] markets," though not exclusively, and be coordinated with the legislative strategy by targeting key congressional districts. It would be best to use "a format that allows for questions and comments" because "we need to be seen as listening." Finally, they recommended holding a two-day health care summit outside Washington, D.C. (regional hearings were an alternative) where "there should be at least two or three people with specific horror stories," and senior citizens "should be encouraged to talk openly about their insecurities about potential changes in medicare (sic) and their choice of doctors," allowing these concerns to be addressed directly. One can hardly read this anticipated script without thinking of similar efforts launched by the Nixon and George W. Bush administrations.

President George W. Bush

Public Liaison is one of several political liaison assignments in the White House. Other prominent ones mentioned above are relations with Congress, state and local governments, and the Republican Party. The White House of George W. Bush addressed each of these areas with separate staff units but sought to coordinate them through an overarching structure, much as the Reagan administration had once considered doing. OPL, Intergovernmental Affairs, and Political Affairs were linked through the Office of Strategic Initiatives and External Affairs. Collectively, these units constituted about thirty staff professionals at the outset of the Bush administration. Inevitably, the activities of OPL and these other units overlapped. Thus, the Bush White House had a single director appointed to oversee all their activities. In this way, the Bush staff hoped to provide the coordination required to work with "external coalitions on major Presidential initiatives,"³¹ that is, generate support behind the President's program.

At the outset, Bush's Public Liaison staff included a Director, Lezlee Westine, two deputies and four associates. One deputy (Tim Goeglein) oversaw relations with conservatives, think tanks, Christian denominations, veterans, national security concerns, judicial nominations and congress-focused coalition building. The other (Kirk Blalock) oversaw economic, trade and budget issues. The associates' assignments included education, black, Jewish and women's issues.³² Westine, holder of an MBA with a law degree, had worked for Governor Pete Wilson in California and for TechNet, an advocacy group for high-tech businesses, the organization to which she returned after leaving the White House. She was co-chairwoman of Bush's 2000 campaign in California and co-organized a multi-million dollar fund-raising event. Rhonda Keenum moved from a position in the Department of Commerce to become OPL Director from 2005-spring 2007, and Julie E. Cram took over the job in March 2007.

Westine was described as "the most prominent advocate for the new economy in the Bush administration,"³³ a position important to an industry that had felt well-received in the Clinton administration. Westine arranged several face-to-face meetings between the president and tech-industry executives early in the administration. Westine also moved quickly to counter criticism of the administration's perceived de-emphasis of women's programs.³⁴ Bush "closed the White House Office for Women's Initiatives and Outreach whose job was to coordinate the work of the women's

³¹ See the White House Press Release for September 4, 2007 that named Barry Jackson as Assistant to the President for Strategic Initiatives and External Affairs. Jackson's background is instructive: before joining the White House, he had been Chief of Staff to Congressman John Boehner and Executive Director of the House Republican Conference. <http://www.whitehouse.gov/news/releases/2007/09/20070904-3.html>

³² Larry Witham, "Goeglein on the Go; Bush Liaison a Go-between on Hot Issues," *Washington Times* (July 10, 2001) A2.

³³ Aaron Pressman, "Tech's White House Connection—Government Activity," *Industry Standard* (April 2, 2001).

³⁴ Mary Leonard, "Bush Liaison Courts the Support of Women: Office Following Clinton Approach," *Boston Globe* (December 20, 2001) A5.

bureaus Clinton had placed in every federal agency. Under this arrangement, it was possible to assess the impact on women of virtually every federal reg.”³⁵ The administration’s stand on abortion rights, pressed aggressively into the international arena, was a topic that broached no compromise. But Westine opened lines of communication with her Clinton predecessors, assembled women’s spokespeople in the White House, and looked for areas of potential agreement.³⁶

Karl Rove, George W. Bush’s principal political adviser and campaign strategist, headed the strategic planning effort created inside the White House, a systematic attempt to prevent short-term events from dominating the staff’s attention. About a dozen senior members met weekly as the “stratery group” in an effort to maintain focus on larger issues while making short-term assignments.³⁷ OPL’s efforts were coordinated with those of the other political offices as well as communications and policy.³⁸ Rove was credited with choreographing the president’s first 180 days in office that featured many examples of bipartisanship;³⁹ he later guided far more partisan tactics heading into the 2002 and 2004 elections. When Karen Hughes left the White House in 2002, Rove also began to oversee the public message functions. In the second term, Rove became one of two Deputy Chiefs of Staff and assumed a broader portfolio that included policy planning. When he left the White House, Rove’s coordination of the four political staff units fell to Barry Jackson who had coordinated the “stratery group” and been responsible for especially sensitive outreach assignments.⁴⁰

Perhaps the closest working relationship with an outside group developed between Bush and business. Early in the administration, the Tax Relief Coalition was formed by a group of large and small business associations to lobby for the president’s 2001 tax-reform package. Rove, Westine and the administration’s lead liaison with business, Kirk Blalock, began planning in mid-February with Dirk van Dongen of the National Association of Wholesale Distributors.⁴¹ The National Federation of Independent Business, U.S. Chamber of Commerce and National Association of Manufacturers were enthusiastic supporters. The coalition generated phone calls, e-mails and letters to Congress based on sample letters, as well as supportive editorials, radio messages and television spots. Pop-up ads carried on a variety of websites facilitated the contacts with congressional offices.⁴² And the coalition continued to grow, doubling in size to more than 1,000 members representing nearly two million businesses by 2003 despite the fact that there was no effort to disguise the coalition’s purpose—assemble support for the Bush administration’s 2001, 2002 and 2003 tax proposals.⁴³

But not all of Bush’s coordinated efforts were successful. The campaign to reform social security in 2005 paralleled in many ways the strategy outlined for reforming health care under Clinton. Bush’s town hall meetings were carefully choreographed to include personal testimonials from citizens likely to benefit from the proposed reforms or examples of people who had been hurt by features of the current system. There was the appearance of interaction with the audience rather than the reality. Events were staged in states and congressional districts where the legislator’s vote

³⁵ Richard Goldstein, “Stealth Misogyny: Bush’s War on Women,” *Village Voice* (March 4, 2003) <http://www.villagevoice.com/news/0310.goldstein,42322,1.html>.

³⁶ Jodi Enda, “Bush Welcomes Women’s Advocates,” *Philadelphia Inquirer* (February 2, 2002) A3.

³⁷ The misspelling, of course, reflected the running gag on Saturday Night Live.

³⁸ Dana Milbank, “Serious ‘Stratery;’ As Rove Launches Elaborate Political Effort, Some See a Nascent Clintonian ‘War Room,’” *Washington Post* (April 22, 2001) A1.

³⁹ Richard L. Berke and Frank Bruni, “Architect of Bush Presidency Still Builds Bridges of Power,” *New York Times* (February 18, 2001) Section 1, p. 1.

⁴⁰ Michael Abramowitz, “Rove Replacement Seen as Highly Partisan Go-Getter,” *Washington Post* (September 10, 2007) A13.

⁴¹ Michael J. Graetz and Ian Shapiro, *Death by a Thousand Cuts: The Fight Over Taxing Inherited Wealth* (Princeton: Princeton University Press, 2005) 158.

⁴² *Ibid.*, 164.

⁴³ *Ibid.*, 166.

was considered “winnable.” The White House worked closely in conjunction with corporate lobbyists, public advocacy groups, selected senior groups and unions to form the Coalition for the Protection and Modernization of America's Social Security which organized support groups in 32 states.⁴⁴ The effort included media advertising, town hall meetings, phone calls and information booths with most efforts focused on the members of congressional tax-writing committees. Karl Rove was the White House mastermind of the overall effort that leaned heavily for funding on administration allies in the business community, particularly the National Association of Manufacturers, financial and securities trade associations, Progress for America and the Club for Growth who were collectively expected to contribute millions to the administration effort.⁴⁵

GENERIC OPL ACTIVITIES

Over the three-plus decades of its formal existence, OPL staff members have consistently filled several generic roles.⁴⁶

- *Group representatives/advocates/case workers.* Appointments in OPL have been a way for administrations to signal responsiveness to politically sensitive and important constituencies. In this way, organized constituencies came to expect a White House “representative” for attending to their interests. Some interests are inescapable—business and organized labor, for example. Other appointments were symbolic of an administration’s responsiveness to major demographic groups: blacks, women, Hispanics and Jewish-Americans are examples. Finally, as specific issues arose or constituencies organized politically, there was a desire to show the White House was attentive—seniors, youth, consumers, gays and Christian fundamentalists fall into this category. By having such aides in the White House, presidents suggested that a group’s interests would be considered in administration policy-making. Some assignments are obvious—ones that cannot be overlooked. Others are short-run (youth in the 1970s) or intermittent (intellectuals⁴⁷). Although there is no approved list of groups meriting attention, discontinuing an appointment can result in sharp criticism.⁴⁸
- *Ambassadors.* The flip-side of representing group interests in the White House is representing the president’s interests to groups.⁴⁹ Whether this occurs in quiet meetings or at large national conferences, or through systematic news releases and newsletters, OPL staff members are expected to carry the president’s message to outside groups. They sort through the many requests for meetings that administration policy-makers receive as well as the requests for speeches to national gatherings, help fashion the responses and make sure they are delivered with the necessary nuance.

⁴⁴ Donald Lambro, “Coalition to Build Support for Social Security Reform,” *Washington Times* (March 25, 2005) A4.

⁴⁵ Jim VandeHei, “A Big Push on Social Security,” *Washington Post* (January 1, 2005) A1.

⁴⁶ For a related way of discussing these activities but from a more institutional perspective see Peterson, “The Presidency and Organized Interests...”. Peterson argues that the White House approach to interest groups may be **inclusive** or **exclusive** and that the focus may be **substantive** or **representative**.

⁴⁷ Although the Bush administration has sometimes been portrayed as anti-intellectual, Peter H. Wehner in the Office of Strategic Initiatives became the catalyst for meetings between the president and historians as well as intellectuals and the White House staff. Peter Baker, “Policy Aide’s Departure Continues Transformation of Bush’s Staff,” *Washington Post* (March 30, 2007) A4.

⁴⁸ For example, the George W. Bush White House discontinued the Office for Women’s Initiatives and Outreach, a separate unit created inside the Clinton OPL in 1995. Vocal critics described the change as a “setback.” Mary Leonard, “Bush Liaison Courts Support of Women Office Following Clinton Approach,” *Boston Globe* (December 20, 2001) A5.

⁴⁹ Joseph A. Pika, “White House Boundary Roles: Marginal Men Amidst the Palace Guard,” *Presidential Studies Quarterly*, Vol. 16:4 (Fall 1986) 700-715.

- *Intelligence Gathering/Interpreters.* In performing their ambassadorial role, OPL staffers interpret to the White House that segment of the interest group universe for which they have responsibility. A good part of this consists of gathering intelligence on what groups and their leaders are doing and saying, as well as the divisions that might exist within a community.⁵⁰ Even more dangerously, groups sometimes feud, as when evangelicals objected to the George H. W. Bush White House inviting representatives of homosexual groups to bill signing ceremonies.⁵¹ Who are these people demanding an audience in the White House? What is their position in the organized community? What policy statements or criticisms of the administration might they have made? What are the ramifications of meeting with them? What message do they hope to hear from the administration? Presidents will not possess adequate knowledge of the full array of associations, organizations and their leadership to make these decisions on their own. Nor is the White House likely to be sensitive to all the nuances that might have political significance. As one aide explained, "Indian organizations prefer that 'Indian' be used as an adjective, not as a noun. And they don't insist on being termed 'native Americans'...but they prefer to be referred to as 'Indian people' rather than as 'Indians.'"⁵² Someone has to raise the red flag on such nuanced issues when they arise in official testimony or in presidential statements. And the modern White House staff system benefits from having such expertise available in-house instead of facing the recurrent problem of finding trustworthy advisers from the political party or in the bureaucracy who can advise them, as was the case historically.
- *Fire-fighters.* OPL staff members are the first line of defense when crises arise in relations with politically significant groups. Whom do you contact when a problem arises? How do we smooth over this difference with the least short-run and long-run damage? When gay activists threatened to denounce the Clinton administration in a noisy march on Washington for its 1993 retreat on gays in the military, OPL organized a quiet meeting with eight organizers designed to minimize the damage.⁵³ Similar sessions have been held in the White House over time with civil rights leaders, womens rights advocates and labor leaders, among others, and will no doubt arise in other administrations. In one observer's terms, the job consists of "dousing fires and soothing egos."⁵⁴
- *Mobilizing support/Building coalitions.* During the Nixon administration, OPL became associated with Charles Colson whose staff was colloquially termed the "office of dirty tricks" because of its involvement in unethical and illegal campaign tactics during the 1970 and 1972 elections. Less noticed, however, were Colson's efforts to organize support in behalf of the president's policies. For example, he organized highly visible support from hard-hat labor unions for Nixon's Vietnam policies. Ever since, OPL has been involved in systematic efforts to mobilize interest group support for presidential initiatives. The strategies can vary from generating grass-roots pressure on Congress to simply using the White House as the center-point for coordinating group efforts. This became the principal

⁵⁰ To illustrate differences within communities, during the Clinton transition, some religious groups who felt that their views had been ignored under Reagan and Bush, argued that the public liaison connection with religious groups should be abolished. Gustav Niebuhr, "A Church-White House Separation? Critics Say Office of Liaison to Religious Groups Should Be Abolished," *Washington Post* (December 25, 1992) A17.

⁵¹ Frank J. Murray and George Archibald, "Bush link to right is fired," *Washington Times* (August 2, 1990) A1.

⁵² Morton C. Blackwell, personal interview, 8/12/82, Washington, D.C.

⁵³ Ann Devroy, "Gay Rights Leaders Meet President in Oval Office; White House Tries to Play Down Session," *Washington Post* (April 17, 1993) A1.

⁵⁴ Romesh Ratnesar, "The Go-Between: Bill Clinton's emissary to Washington interest groups douses fires and soothes egos," *Stanford Magazine* (Jan/Feb 1998). Available online at the following: <http://www.stanfordalumni.org/news/magazine/1998/janfeb/ljournal/onthejob.html>.

mission of OPL during the Carter administration when leadership shifted from Midge Costanza to Anne Wexler. It was also an important part of the Reagan administration's first-year legislative victories on the budget and tax cuts; moreover, members of the legislative coalitions shifted—the coalitions are often issue-specific. Both the Clinton and George W. Bush administrations sought to make mobilizing efforts still more systematic, as discussed earlier.

- *Public education.* Because Gerald Ford entered the presidency without the benefit of a national election, he sought to use a series of White House town meetings to travel the country, introduce himself through local media outlets, and build momentum before the 1976 campaign. OPL was the staff charged with organizing and coordinating these events. In subsequent administrations, OPL has been involved in organizing White House summits and similar town hall meetings, though other White House units might take principal responsibility for the events. This “soft-sell” strategy draws on OPL staff members’ networks of connections to generate co-sponsors, participants and messages.

RECURRING ISSUES REGARDING OPL

RELATIONSHIP WITH OTHER WHITE HOUSE UNITS

Because it stands at the intersection of communications, congressional relations, political affairs and public policy, OPL’s responsibilities need to be coordinated with a number of other units or, alternatively, might be made subordinate to another unit’s control. Leaving these relationships unclear could unleash the kind of struggle seen between Ed Rollins and Pat Buchanan in the Reagan White House when OPL suddenly found itself in a vacuum. Each administration’s solution to this issue has been the product of several factors, including organizational design, the influence and stature of the office’s director, and the preferences of the White House chief of staff.

Colson was something of a free-spirit in the Nixon administration, reporting most clearly to the chief of staff, H.R. Haldeman, and the president, himself. In the Ford administration, OPL was most closely linked to congressional relations in the person of Jack Marsh who was responsible for overseeing both offices. Though logical, that arrangement, has not been repeated in any subsequent administration. Instead, the office has most frequently been overseen by the director of communications who has often served as the hub of an administration’s outside message. This pattern emerged late in the first Reagan administration and was repeated in George H. W. Bush when the office was overseen by David Demarest. Later in the first Bush’s term, the office was linked to intergovernmental affairs, an outcome that appears to have been more a solution dictated by organizational design concerns—here were two offices that needed to be supervised—than by the need for functional coordination between two units whose work is not very closely linked.

Several administrations have sought to enhance coordination of multiple staff units (including OPL) in an effort to advance the administration’s legislative program. This became the responsibility of Vice President Mondale in the Carter administration after the staffing system underwent dramatic corrections in mid-1978. Such a strategy was also proposed, though not implemented, at the outset of the second Reagan administration when the need to bring strong conservative voices into the administration halted the plan to center coordination on Max Friedersdorf.⁵⁵ Of these efforts, however, Karl Rove’s responsibility for both the message and the political strategy of George W. Bush went the furthest as the Office of Strategic Initiatives and External Affairs coordinated OPL,

⁵⁵ Anonymous, *New York Times* 1/31/85 “Overhaul of Staff at White House to Include New Political Position”

political affairs and intergovernmental affairs. Rove's reach gradually extended to include communication strategies more generally and then domestic policy development.

STAFF SIZE

As noted earlier, the size of OPL has varied tremendously across administrations, though the figures on staff size are far from solid. Because some administrations have highlighted liaison with particular communities by giving them independent White House standing outside OPL, one really needs to gauge the commitment to group liaison overall rather than merely rely on OPL's size. As best we can gauge based on unsystematic data, Reagan's OPL staff totals were the largest in the staff's history and George H. W. Bush's the smallest, with the range in size being approximately 50 to 15.⁵⁶

CONSOLIDATING GROUP LIAISON IN OPL

Even after the office was created under Ford, aides outside the OPL structure continued to hold responsibilities for working with groups, a pattern that has persisted in later administrations. In the White House of George W. Bush, for example, the Office of Faith-Based and Community Initiatives maintained close contacts with Christian conservatives, but Tim Goeglin also held that portfolio in OPL, following in the tradition of Morton Blackwell in the Reagan White House twenty years earlier.⁵⁷ Individual staff members in other parts of the White House and the EOP complex (for example, OMB and domestic policy staffs) inevitably become involved in group liaison when issues arise that affect a constituency where they have had first-hand experience. This happens all the time in working with Congress; congressional relations might be centered in the Office of Legislative Affairs, but many other staff members are likely to have a hand in the process based on previous political and employment experiences. The same thing happens in working with interest groups. Thus, it is unlikely that *all* group liaison will occur through OPL. This reflects the distinction made by Mark Peterson between "interest group liaison" as it is conducted by anyone in the White House and units of the EOP, and "public liaison," the groups explicitly targeted in OPL.⁵⁸ Administrations have found it advantageous to heighten the visibility and potential significance of relations with particularly important groups by providing White House connections outside OPL. This is virtually certain to happen again in the future.

A related issue is whether OPL should handle group casework or divorce those activities from enlisting support behind presidential priorities. Only in the Carter administration was liaison with high-visibility constituency groups separated from OPL. And as noted above, Wexler was adamant that this was a critical for her effectiveness. If OPL is saddled with the need to handle complaints from unhappy groups about administration decisions "you get dragged into a lot of issues and a lot of concerns and a lot of problems that really inhibit your ability to focus on things that are really important as a public liaison assistant, which is really building support for the president's program."⁵⁹ To create another tier of case-work assistants, however, increases size as well as problems of coordination.

⁵⁶ Bobbie Kilberg is quoted in one source as giving Reagan's staff total as 56. In contrast, her own was 15. Peterson, "The Presidency and Organized Interests..." 623.

⁵⁷ Jim VandeHei, "Pipeline to the President For GOP Conservatives; Give and Take Flows Through Public Liaison Aide," *Washington Post* (December 24, 2004) A15. Blackwell worked with all religious groups other than Jewish and Roman Catholics who had their own contacts on the Reagan staff.

⁵⁸ Peterson, *op. cit.*, 613. Peterson also provides evidence from the interest group side of the relationship that documents how widespread contacts are between groups and the White House.

⁵⁹ Anne Wexler, personal interview with the author 2/5/82, Washington, D.C.

INSIDE VS. OUTSIDE LIAISON

Is it better for the president to rely on group liaison performed from inside or outside of the White House? Since Nixon, successive administrations have chosen to locate it largely *inside*, rather than relying on the traditional avenues of liaison—executive branch officials and party officials. The prevailing view has been that only by bringing such sensitive questions inside the White House can presidents be certain that their priorities will prevail. Some argue, however, that bringing more work inside the presidency bogs it down by making coordination a full-time challenge. It also leads groups to expect that they will have a hearing with the chief executive on issues of strong concern. Moreover, where does one draw the line on representation? The group universe is far too diverse for all communities to warrant a staffer inside the presidency, so strategic decisions must be made. However, failure to provide groups with the level of representation that they have previously enjoyed runs the risk of being seen as a symbolic insult. And groups are enormously sensitive to perceived slights. Once the expectation has been established that a group will enjoy access to the White House, it is politically costly to violate it. For example, white ethnics complained when the Reagan administration did not appoint a Special Assistant for Ethnic Affairs, a position that Ford established in 1976 and Carter in 1980, relatively obvious efforts taken prior to their campaigns. Despite these cautionary points, however, OPL has become a fixture in the post-Nixon era.

DIRECTOR'S GENDER

It is noteworthy that since its inception in 1974 only twice have men served as director of OPL—Bill Baroody at the outset and David Demarest for a brief time at the conclusion of the George H. W. Bush administration. Thus, 16/18 directors have been women and the recent record would have been unbroken had it not been for a brief vacancy late in the first Bush administration that explains Demarest's assignment. Even in administrations where there has been considerable staff turnover, women have been chosen to replace women. Thus, as Helen Thomas noted more than a decade ago, OPL has become a White House staff position that has, for all intents and purposes, become the "traditional female slot in Republican and Democratic administrations." It ensures that there will be at least one visible woman among the senior staff "but not [necessarily] in the high councils where the big issues are deliberated."⁶⁰

CONNECTING OPL WITH POLICY-MAKERS

George H. W. Bush drew sharp criticism from the Jewish community when the administration sought to link loan guarantees to Israel with progress on talks with the Palestinians about West Bank settlements. There was the perception that these groups enjoyed far less access to policy-makers than they had in the Carter and Reagan administrations. While Barbara G. Kilberg, the OPL staffer responsible for liaison with Jewish groups, drew "high praise from Israel supporters," the complaint was that she "is not a policymaker."⁶¹ Groups, then, want assurance that they will be able to influence White House decision making on the issues of greatest significance to them. The first step is to have a contact in the White House, but the next step is to ensure that this contact can help shape policy. OPL staff members have seldom had the standing to shape policy, though the senior presidential adviser who oversaw their efforts usually did (e.g., Rove in George W. Bush).⁶²

Nonetheless, the question persists: How does the White House factor the views of groups into its decision making? For Anne Wexler (and presumably for others), this required a critical balancing

⁶⁰ Helen Thomas, "Backstairs at the White House," *UPI* (August 19, 1991).

⁶¹ Andrew Rosenthal, "Bush Acts to Calm Israel Amid Uproar," *New York Times* (September 21, 1991) A1.

⁶² Most OPL directors have been in the third tier of White House salaries, below Assistants to the President and in the lower-rung of Deputy Assistants.

act. The policy-related part of her job meant consulting with groups who would be directly affected by a policy in order to secure their support when the initiative had to be sold. Alexis Herman argued the same point in her recently released 1993 memo: it is critical to solicit group input during the policy formulation process if one also hopes to enlist their support on Capitol Hill. But groups also expect that their representatives in White House councils will advocate their interests. For this reason, Wexler wanted to keep the two staff units separated inside the White House. How could she consistently present herself as the “president’s advocate” if groups also expected her to be advocating their interests? Thus, she explicitly separated developing and selling the president’s programs from case work activities. In essence, her unit expanded the White House capacity to assess the politics of policy-making. An alternative organizational strategy is Karl Rove’s “stratategy” group: make sure that politics and policy-making are addressed through systematic staff coordination.

Regardless of how the role is structured, an aggressive program of group briefings enables an administration to bring influential policy-makers together with group representatives in the impressive surroundings of the White House. Many administrations have used these relatively intimate, ego-stroking sessions as a means to provide rich context for their policies and thus to avoid criticism. Done regularly, these briefings provide an ongoing forum for group leaders to hear first-hand the logic and rationale for administration actions. Large events can also be held at the White House, but the logistics pose challenges that cause even greater damage if they go wrong as in 1990 when 1,800 Cuban Americans from around the nation were invited to the White House to observe the 88th anniversary of Cuban independence. The outside event was canceled just a few hours beforehand due to reports of an impending rain storm. The resulting political storm was far greater.⁶³

DIVIDED LOYALTIES

Many OPL aides have been drawn from long careers as activists in the movements or the constituencies with whom they deal from the White House. The value of such staff members lies in their intimate familiarity with the nuances of a constituency—the players, the internal politics, the policy positions and the group’s particular sensitivities. But that same experience poses a dilemma: Whom do such aides represent, the community with which they work or the president?

This question becomes critical when the administration’s policies are at odds with the community’s preferences. This can pose a personal dilemma for those staff aides who are committed to the positions of that constituency. Even when staffers are self-consciously committed to serving the president first, they can be subjected to enormous pressure from outside groups. As Jacob Stein, liaison with the Jewish community during the Reagan administration pointed out, “I never thought I was here [in the White House] representing the Jewish community. I thought I was here as an adviser to the president... There was never an election in the Jewish community as to whom their representative should be here.” Yet after every incident when there was a major difference of opinion between the community and the administration’s policy, he was asked how he could possibly remain in his position. But as he explained, “I think that when there’s an issue [a conflict] that my advice is more sorely needed than when everything is running placidly. And for me to simply pick up and leave on every issue” would deny the president the benefit of that experience when it was most essential. “Don’t they understand that in order for you to be effective you gotta be here, when you leave a vacuum is created, don’t they want a point of view—which they must presume I generally share—presented so that it will change, modify, mitigate, affect, alter [policy], or do something?”⁶⁴

⁶³ Ann Devroy, “President’s Invitees Left in the Lurch,” *Washington Post* (May 23, 1990) A4.

⁶⁴ Jacob Stein, personal interview 1/22/82, Washington, D.C.

Similarly, Nelson Cruikshank broke openly with President Carter on several occasions when the administration adopted policies that he viewed as damaging to Social Security. Cruikshank was not included in discussions that cut the budgets of several programs, changes that he regarded as being “wrong in principle. They were being done for the wrong reasons—they were being done for budgetary reasons and also for [Secretary Joseph] Califano’s personal drive...but he sold it.” Cruikshank was furious, contacted influential figures outside the administration (Wilbur Cohen and Bob Ball) to enlist them in a common effort and launched a strategy to reverse the budget cutbacks, including an appeal to Mrs. Carter.⁶⁵ He later offered to resign from the White House after he made arrangements to testify on Capitol Hill against the administration’s proposed cuts. Despite this open breach that was likely to embarrass the administration, Carter declined to accept the resignation. Such mini-dramas have involved other OPL staffers, for example, when movement conservatives working in OPL felt that Republican presidents have not moved the social agenda forward with sufficient speed.

STRATEGIC CHOICES

Thus, in designing the White House, an administration must make several key choices about public liaison.

- *How extensive will the liaison effort be?* Some administrations have been far more ambitious (or inclusive) in establishing liaison efforts than others, trying to provide liaison staff not only for the key members of their own coalition but also for groups outside their supporting coalition. This pattern may also change over time; administrations tend to expand liaison efforts as a re-election campaign approaches.
- *Will public liaison be primarily oriented toward selling the administration’s program on Capitol Hill or will it primarily be designed to provide symbolic reassurance that group views are being considered and their concerns addressed?* Peterson describes the former as a “governing party” strategy and the others as “outreach” or “legitimization.”⁶⁶ Few administrations are easily categorized as pursuing a single strategy. Instead, most administrations reveal a mix of motives and goals. It might be argued, however, that Carter’s efforts under Anne Wexler and Reagan’s attention to his governing coalition were probably most focused on creating a governing party; while this strategy has not been absent in other administrations, the effort may have been pursued in a less determined way.
- *How will public liaison be factored into White House policy-making?* Factoring group interests into policy making is especially important in domestic policy but is also significant for trade policy and policy in the Middle East. Relations, then, must be established with the domestic and economic policy staffs and selected members of the National Security Council staff. Optimally, the White House uses OPL in their efforts to take group views into consideration as they develop policy. There will also be an interest in using OPL as a way to organize briefings designed to explain an administration’s policy rationales to group leaders.
- *To whom will public liaison report?* If it is conceived as part of a coordinated communication policy, as has frequently been the case, there has been one answer. If OPL, on the other hand, is viewed as part of a coordinated congressional relations effort or as a start for the re-election campaign, another answer has prevailed.

⁶⁵ Nelson H. Cruikshank, personal interview, 8/20/82, Washington, D.C.

⁶⁶ Peterson, “The Presidency and Interest Group...” p. 614.

ADVICE FROM FORMER OPL STAFF

OPL has existed for nearly thirty-five years and many of its alums are still active as successful lawyers, lobbyists and political activists. Most are likely to agree to be interviewed by incoming administrations about their responsibilities. (See Table) Although much time has passed and administrations may vary in how the staff is organized, many of the unit's basic features remain unchanged as illustrated by the following quotes from Carter and Reagan staff members.

On striking a balance between advocacy and selling policy:

"Don't do casework...it'll eat you alive."

On the shifting nature of staff assignments:

"[Assignments] changed all the time depending on what the issues were."

On responsiveness to groups' needs:

"We never turned anybody down when they requested a meeting."

On the value of assembling community leaders from outside Washington to a White House briefing:

"One can never diminish the power of the White House—it's very substantial. People cherish a White House invitation...They remember it all their lives."⁶⁷

On the importance of providing prior notification to Washington insiders:

"Uppermost in our minds was that you get a lot of help from people by recognizing what their own system rewards. A Washington representative for a company or association or an organization has its rewards; part of that is 'information is power'—being the first to know as a representative of a company that is very much affected by a White House proposal—he would like to call the chairman of the company before he hears it on the news to say 'Guess what, I was just at a briefing at the White House and this is what we'll see.' So we were conscious of that and did a good job letting people know about things before they were announced."⁶⁸

On helping White House policy makers anticipate political reactions within a community:

"I tried to sensitize those staffs as to what would be the political reaction within the Jewish community to certain issues."

On tensions between the White House and the community represented by a staffer:

"It's always pleasant when you have great support, here [the White House] and in the community. You don't have it all the time."⁶⁹

On the allocation of time devoted to different constituencies:

"Whoever squeals the loudest is the one that gets the most attention."

⁶⁷ Anne Wexler interview, 2/5/82.

⁶⁸ Anonymous interview with a Carter OPL staffer, 8/23/82, Washington, D.C.

⁶⁹ Jacob Stein, personal interview 1/22/82, Washington, D.C.

On the dominant White House strategy in working with groups:

“The strategies we have developed are based on trying to keep the [voting] coalition together. In a sense you have two coalitions, an electoral coalition and a governing coalition and they don’t always necessarily gel.”

On whether staff members consider themselves a “representative” of the demographic group they work with or a “contact”:

“They write directly to me. I’m their person in the White House. ‘Can I help them? Can I do this for them?’ Especially with _____, ‘You’re our man in the White House. You should be able to get a letter or a proclamation’ or something like that. And besides, there’s no departmental counterpart.”

On coordinating groups’ lobbying efforts on Capitol Hill:

“You’ve got to be very careful... There are coalitions out there. They will meet and I’ll go over to meet with them and sometimes they meet here [in the White House]... It’s really more of a conduit [for information] but we’re very careful not to do active lobbying because there are the anti-lobbying provisions that we’re subject to and we just can’t go out and tell a congressman to do this or do that.”⁷⁰

⁷⁰ Anonymous interview with a Reagan OPL staff, 8/23/82, Washington, D.C.

OFFICE OF PUBLIC LIAISON DIRECTORS

Presidents Richard M. Nixon to George W. Bush

Administration	Director
Richard M. Nixon	Charles M. Colson (pre-OPL)
Gerald R. Ford	Michael J. Baroody, Jr.
Jimmy Carter	Margaret (Midge) Costanza Anne Wexler (Office of Public Outreach)
Ronald W. Reagan	Elizabeth Hanford Dole Faith Ryan Whittlesey Linda Gerst Chavez Mari Maseng Rebecca Range
George H. W. Bush	Barbara (Bobbi) G. Kilberg Cecile B. Kremer David Demarest (briefly)
Bill Clinton	Alexis Herman Maria Echaveste Minyon Moore Mary Beth Cahill
George W. Bush	Lezlee Westine Rhonda Keenum Julie E. Cram

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, 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 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.