

Advisory Committee on the Presidential Library-Foundation Partnerships
February 24, 2016, Austin, TX
Meeting Minutes

Advisory Committee Members

Jerry Fleagle – Hoover Presidential Foundation
Felicia Wong – Roosevelt Institute
Alex Burden – Truman Institute
Stephen Hauge – Eisenhower Foundation
Doris Drummond – John F. Kennedy Library Foundation (alternate)
Larry Temple – Lyndon Baines Johnson Foundation
Ronald Walker – Richard Nixon Foundation
Joseph Calvaruso – Gerald R. Ford Presidential Foundation
Bruce Lindsey – William J. Clinton Foundation
Holly Kuzmich – George W. Bush Foundation (alternate)
Not in attendance: Jeff Carter, Fred Ryan

Advisory Committee Members Participating by Phone

James Cicconi – George Bush Presidential Library Foundation

Foundation Association Members in Attendance

Robert Downer – Hoover Presidential Foundation
Nancy Roosevelt Ireland – Roosevelt Institute
Carly Goettel – Roosevelt Institute
Meredith Sleichter – Eisenhower Foundation
Amy Barbee – Lyndon Baines Johnson Foundation
Bill Baribault – Richard Nixon Foundation
Fred McClure - George Bush Presidential Library Foundation
Stephanie Streett - William J. Clinton Foundation
Brian Cossiboom - George W. Bush Foundation
Tobi Young- George W. Bush Foundation

Foundation Association Members Participating by Phone

Glenn Baker – Ronald Reagan Presidential Library Foundation

NARA Staff in Attendance

The Honorable David S. Ferriero – Archivist of the United States
Debra Wall – Deputy Archivist of the United States
William J. Bosanko – NARA Chief Operating Officer and Acting Director, John F. Kennedy Presidential Library and Museum
Christopher Runkel – NARA Senior Counsel
Jim Gardner- Executive for Legislative Archives, Presidential Libraries and Museum Services
Susan Donius – Director, Office of Presidential Libraries
Sam McClure – Deputy Director, Office of Presidential Libraries
John Laster – Director, Presidential Materials Division
Tom Putnam - Office of Presidential Libraries

Tom Schwartz - Herbert Hoover Presidential Library and Museum
Paul Sparrow - Franklin D. Roosevelt Presidential Library and Museum
Kurt Graham - Harry S. Truman Presidential Library and Museum
Mark Updegrove - Lyndon B. Johnson Presidential Library and Museum
Meredith Evans – Jimmy Carter Presidential Library and Museum
Duke Blackwood - Ronald Reagan Presidential Library and Museum
Warren Finch - George Bush Presidential Library and Museum
Terri Garner - William J. Clinton Presidential Library and Museum
Alan Lowe - George W. Bush Presidential Library and Museum
Not in attendance: Michael Ellzey - Richard Nixon Presidential Library and Museum

NARA Staff Participating By Phone

Karl Weissenbach - Dwight D. Eisenhower Presidential Library and Museum
Elaine Didier - Gerald R. Ford Presidential Library and Museum

David Ferriero (Archivist of the United States) welcomed the group to the Advisory Committee meeting at the LBJ Library in Austin, TX, especially the new Foundation leaders and staff in attendance as well as the new Presidential Library Directors.

Guidance on Partisan-Political Activities at Presidential Libraries (Runkel)

Christopher Runkel (NARA Senior Counsel for Trust Fund and Foundation Policy) gave an overview of the approach NARA's Office of General Counsel uses when advising the Office of Presidential Libraries (LP) and library directors on events to be held at Libraries that might involve impermissible political activities.

Mr. Runkel noted that NARA's guidance applies only to NARA spaces in Libraries, adding that Foundation rules for their spaces were not within the scope of his presentation. He noted most questions come to his office regarding requests by groups or candidates to use Library space. NARA building regulations provide the limitations on the use of NARA space by not allowing partisan political activities. He pointed out that NARA uses the Hatch Act in determining whether an event should be considered partisan-political (i.e., "activity directed at the success or failure of a political party, candidate for partisan political office, or partisan political group"). For instance, if a local political group wanted to meet in NARA space to support a candidate, that activity would not be permitted. Mr. Runkel commented that the activities of the group were not improper; but the activities are just not allowable in NARA space.

Mr. Runkel continued that while candidates are not normally allowed to make campaign appearances, there are two exceptions. The first is that candidate debates are allowed under certain conditions, and the second is that candidates are allowed to give policy speeches under certain strict conditions. Among conditions for debates is that once a director agrees to use of NARA space, then the NARA/Library staff must step out of the planning process. Another group (the library foundation, a nonprofit organization, a media partner, etc.) must be the debate's organizing body. In addition, the debate organizers must agree to limit the more partisan aspects of candidate appearances or events, such as no candidate posters or leaflets and no handpicked crowds. The debates should be as open as possible to the public and NARA

encourages organizers to include as many candidates as possible. Overall, a debate is an appropriate use of Library space because the President was a political person who lived in a political environment.

Other rules apply to policy speeches. Any Library and Foundation wanting to host candidates must be willing to extend invitations to every major candidate. While NARA policy will allow policy speeches by individual candidates the agency encourages Foundations to invite candidates from both parties. Mr. Runkel noted that NARA will not allow other types of candidate appearances in Library space – including the tour of a Library exhibit by a candidate with a videographer.

Mr. Runkel concluded his presentation by stating that NARA allows town hall-style meetings for Members of Congress if those meetings are organized by district/permanent staff. If the town hall is proposed by political staff the agency would not permit the event. He commented that his office advises Directors on these issues regularly. In concluding his presentation he asked the committee for any questions.

Bruce Lindsey (of the Clinton Foundation) noted that the document Mr. Runkel shared with the group mentioned Libraries and Foundations but applies only to NARA spaces. If his presentation materials are distributed publicly, Mr. Lindsey asked that they be clarified accordingly. Ronald Walker (of the Nixon Foundation) said the presentation document mentions “Director” in reference to the NARA Library Director, but given the Foundation head is also a Director at the Nixon Library this could be confusing. Mr. Runkel said he would clarify the document.

Mr. Walker asked Duke Blackwood (Director of the Reagan Library) if he had encountered any issues when the Reagan Foundation hosted debates at the Reagan Library. Mr. Blackwood said no, because as the NARA Library Director he did not engage in any of the detailed planning for the events. Mr. Walker said the Nixon Foundation would always consult with the Library Director to avoid embarrassment and expects all Library Foundations would do the same. Mr. Lindsey and Stephanie Streett (of the Clinton Foundation) mentioned that they have allowed field hearings by elected officials of both political parties in their Foundation space and that they expect to continue to do so. William Baribault (of the Nixon Foundation) said the Nixon Foundation hosted a simulcast of a GOP debate in their space, and that they might do so again.

Guiding Principles for Library-Foundation Partnerships (Donius)

Mr. Ferriero began the discussion by noting this draft document resulted from NARA bringing on so many new Directors in the past year. He said the agency wants to establish general principles that can be consistent across the thirteen unique situations at the Libraries. With the Committee members having had a chance to review the draft before the meeting, Mr. Ferriero turned the discussion over to Susan Donius (Director of the Office of Presidential Libraries). Ms. Donius commented that in bringing on four new Directors in last year, she and the agency’s senior leadership had realized the agency needs a reference document that could reflect NARA’s standards in a consistent manner across the relationships of every Library and Foundation. She noted that all Directors and NARA leadership participated in the drafting of the document, but

that she now turned to the Committee for input that will allow the group to define its common goals and principles. Mr. Ferriero stated his intent that this draft is a starting point, and that he wants a small working group of Foundation and NARA staff to refine the document.

Mr. Lindsey replied that the Foundations agreed refinement is needed, noting that there are passages in the draft that the Foundations either disagrees with or do not understand. Mr. Walker said the Advisory Committee would be glad to offer volunteers for the subgroup. Mr. Baribault volunteered for the effort. Joseph Calvaruso (of the Ford Foundation) asked for documents that provide information on NARA standards (digitization standards, for instance). Ms. Donius said reference documents would be shared with the group.

Tobi Young (of the George W. Bush Foundation) expressed her appreciation of the effort that went into the draft and acknowledged the complexity of addressing all Library-Foundation situations in one document. Alex Burden (of the Truman Institute) remarked that questions about the NARA Gift Fund and Trust Fund--already in an ongoing conversation with the Committee--needed additional clarification and discussion as part of this work.

Ms. Streett asked about the mention in the document of NARA approval for content related to outreach communicated in the Library's name. Mr. Calvaruso agreed with the question, adding the document needs language to protect a Foundation's right to not fund content/programs at their discretion. Mr. Calvaruso commented the Committee has to look at the intent of document – is it guidance for Library and Foundation staff or just NARA staff? This could wind up being a much longer document, but it may be needed. Ms. Donius replied that the common aspects of the guidelines are general, but that the document may need more specific language to reflect unique situations at each site. Mr. Ferriero said he wants the document to be useful for both Library and Foundation staff. Mr. Calvaruso also volunteered for the working group. Mr. Ferriero concluded the discussion by asking that any other interested Foundation volunteers should contact Susan Donius.

ACTION ITEM 1: NARA will share documents describing NARA standards (as referenced in the draft Guiding Principles document) with the group.

ACTION ITEM 2: Foundation representatives interested in participating in the subgroup to review the draft Guiding Principles document should contact Susan Donius.

National Archives Outreach Program (Gardner)

Jim Gardner (Executive for Legislative Archives, Presidential Libraries and Museum Services) began his presentation by noting NARA's National Outreach Program is broader than the Presidential Libraries. Because the development of a national program is a strategic initiative for the agency, his goal is to include the Libraries and all NARA facilities into a larger, national network. Mr. Gardner noted NARA has the capacity to reach across the nation but that the agency has not done much in terms of coordinated outreach to date.

Mr. Gardner said the national outreach program is not intended to replace any Library's initiatives. In part, the new effort is designed to improve the agency's reporting of outreach and the impact of outreach so NARA can report on the full scope and impact of its efforts. One

aspect of this is the establishment of a series of survey instruments to deploy across the agency, with mandatory questions in every survey and a set of pre-approved optional questions that can be added to create customized surveys for each site to use. The goal is to undertake surveys of exhibits, public programs, education, etc. to get a sense of what works and does not work for NARA's visitors. In the first year the primary goal is to gather data, with more focus on the analysis of that data starting in the second year.

Mr. Gardner referred to the ongoing outreach efforts in the Presidential Libraries and the rest of NARA as a key aspect to the new program. In expanding the outreach of the agency he described the plan to launch a new thematic campaign each year. The first is "Amending America." Inspired by the 225th anniversary of the Bill of Rights, the campaign features a significant new exhibit opening in the National Archives in March, a traveling exhibit (developed by NARA's new traveling exhibits staff), and an inexpensive mass-produced "pop-up" exhibit of document reproductions that will be widely distributed. Mr. Gardner said NARA's Education and Public Programs office will launch the National Conversations on Rights and Justice this year, including discussions at the Japanese-American National Museum in Los Angeles focusing on immigration rights and reform, a conversation on civil rights at the Carter Presidential Library, a conversation on LGBTQ human rights and civil rights at the Chicago History Museum and the Center on Halsted in Chicago, and an event discussing women's rights and gender equality at the National Archives at New York. He said the goal is to hold another event early in 2017 at the George W. Bush Library and a program in spring 2017 at the National Archives in Washington to pull together the strings of the many conversations.

To support the reporting of the agency-wide efforts that will soon get underway Mr. Gardner said NARA's Office of Presidential Libraries will start gathering information on Amending America-related activities in the Presidential Libraries. Mr. Gardner noted he wants to gather what the Libraries are doing and share images of the thematic banner for Amending America in use in the Libraries and other NARA facilities when staff are holding programs, teacher training, related to the campaign. He noted that discussions are underway with a number of Libraries to host the traveling exhibit.

Mr. Gardner referred to the logo developed for Amending America, adding that the logo will be used in all the materials and programs of the campaign. He said this first thematic campaign is a very large one, but later campaigns may be narrower in focus. The exhibit planned for the National Archives in Washington as well as a traveling exhibit for 2017-2018 will be on Vietnam. He commented that NARA will look to some Libraries for engagement on the topic, but obviously not every Library or NARA facility connects to the Vietnam War. While the first campaign is launching in Washington, he would want to launch a thematic campaign in a Presidential Library that later gets shared with Washington.

In NARA's effort to increase its digital engagement, Mr. Gardner noted that his office is working closely with NARA's Office of Innovation on digital versions of exhibits and programs. He said their online efforts will also feature digital-only outreach – like providing the 11,000 failed constitutional amendments.

Mr. Gardner concluded his presentation by describing the agency's development of a robust traveling exhibits program. While the program is just getting started he said the team is developing traveling exhibits topics like Amending America, World War I (both the war and the home front), a photo show on Vietnam, and a traveling version of the Charters of Freedom. He said the effort is driven by market research the team has conducted to determine the interest in hosting exhibits. While the early focus is on smaller exhibits with facsimiles, in time the program will create larger shows featuring original documents and objects. He noted the intent is for a flexible approach. For instance, the traveling exhibit for Amending America uses facsimiles, but the first venue hosting the exhibit has asked for originals so his office will support that.

Mr. Burden asked if the exhibit market research is available to Library Directors. Mr. Gardner replied his office can share what they have gathered from the approximately 600 groups they have talked to. Mr. Burden commented he would love to learn lessons from the effort. Mr. Gardner said he is happy to share the information, because the research gave interesting insight into where NARA fits with other organizations' sizes and budget limitations. He added that NARA will expand its loaning of marquee documents, because other institutions are eager for the attendance spikes that come from the brief shows of key documents like the Louisiana Purchase.

Mr. Lindsey asked about the schedule for the traveling exhibit for Amending America. Mr. Gardner responded that the first venue is taking the first two slots for the exhibit, the second venue is taking the third slot, and then there is availability for another venue. Mr. Lindsey expressed the hope that the traveling exhibit has been designed to fit into the small changing exhibit spaces available in the Presidential Libraries. Mr. Gardner confirmed it can work in the spaces typically available in a Presidential Library. Mr. Lindsey commented that the sooner the Libraries and Foundations can know what programs and exhibits are planned the better they will be able to add a thematic campaign's exhibit to their local schedules. Mr. Gardner agreed, noting that he is pushing his exhibits staff to set a five-year plan to ensure good coordination with the Libraries and other institutions.

Mr. Calvaruso said the Ford Museum does not have a large auditorium or space, so they rent other spaces for events. He asked if NARA's reporting guidelines including counting attendance at events held in other venues. Ms. Donius and Mr. Gardner agreed the current reporting guidance supports the counting of those audiences, with Ms. Donius adding her staff will follow up with the Ford Museum staff to ensure their reporting is complete and accurate. Mr. Calvaruso asked if attendance from programs where the Foundation is the key promoter for an event but the Library involved should be counted. Mr. Gardner and Ms. Donius agreed that those attendance figures should be reported as well.

Mr. Burden commented that the sharing of planning information and documents from DC is key. He added that the national tour of the Acts of Congress was a significant and positive event at the Truman Library, so the more the planning for future exhibits and events can be shared, the better the Libraries can take advantage of these opportunities through marketing and promotion. Mr. Gardner agreed, noting that as part of this improved coordination his goal is to have different Libraries exhibit different key documents in response to their local needs and interests. He

concluded the discussion by inviting the Committee members to contact him with any ideas they have for potential projects. Mr. Ferriero observed that NARA holds regular meetings with the National Archives Foundation to discuss the projected exhibit schedule and that the agency should do the same with this group.

ACTION ITEM 3: NARA will share its traveling exhibit market research with the Foundations.

ACTION ITEM 4: NARA will ensure the outreach attendance reporting at the Ford Museum and other sites includes all programming and events supported by the agency's performance reporting guidance.

ACTION ITEM 5: Foundation representatives should contact Jim Gardner with any ideas for potential projects that could become components of the National Outreach Program.

ACTION ITEM 6: NARA will share with the Advisory Committee the projected exhibit schedule it shares with the National Archives Foundation.

White House Transition Project (Martha Kumar and Terry Sullivan)

Dr. Martha Joynt Kumar (Professor Emeritus, Towson University) stated this project has been a case study for the scholarly use of Presidential Libraries. She noted the project features a group of scholars who interview key members of White House staffs and create organization charts, going back to the Carter administration. Dr. Kumar described how the incoming George W. Bush administration used documentation from the project to support their planning during their transition. The analysis used to rely on the staff telephone directories created and maintained by each administration, but as technology has evolved the project has had to rely on other materials to discern the staff structure in each White House office. She described how the White House Transition Project also analyzes speeches, executive actions (Executive Orders and other formal policy memoranda) and other actions in the first 100 days for various administrations. She recommended that Presidential Libraries should seek to solicit transition files for their holdings. Alan Lowe (Director of the George W. Bush Library) and Brian Cossiboom (of the George W. Bush Foundation) both replied that the transition files of the George W. Bush administration are likely in the pre-Presidential files on deposit at the Library.

Ms. Young (George W. Bush Foundation) said that as part of the George W. Bush administration's efforts to complete a smooth transition, Bush administration staff left policies and charts for reference on the desks for every office in the incoming Obama administration staff. Mr. Cossiboom added that Bush administration staff also met and briefed Obama administration staff. Mr. Walker said the outgoing staff from the Johnson administration staff gave great support to the incoming Nixon administration staff. Dr. Kumar observed that the goal is a bipartisan transition, as was shown in the transition between the George W. Bush and Obama administrations. For historical perspective she read excerpts of exchanges between President Truman and Eisenhower (when he was a Republican Presidential candidate) illustrating a more contentious relationship between leading figures from opposing political parties.

Dr. Kumar described the programs the White House Transition Project hopes to hold at the three Presidential Libraries in Texas to discuss the structure of White House national security staffs, crisis management, and Presidential transitions. The intent is to hold these programs in partnership among the White House Transition Project, the Presidential Libraries, the Library Foundations, and the universities in close proximity to the Libraries.

In introducing Dr. Terry Sullivan (University of North Carolina at Chapel Hill) Dr. Kumar mentioned the analytical materials (largely based on Library holdings) the White House Transition Project is creating in its analysis of White House operations. Dr. Sullivan said the goal of his efforts is to create an institutional memory of White House transitions. Many of the research inquiries of his project come from questions he receives from transition staffs. One example he gave was an incoming Chief of Staff asked what does the President do all day? Dr. Sullivan described how research using Daily Diaries from many Presidential Libraries leads to findings that Presidents tend to start working longer and longer days during their first 100 days in office. Dr. Sullivan added his team of data modelers and researchers also uses Presidential schedule information from times of national crisis with data to create resources that can inform decision makers – for instance, to depict to what extent a President’s daily schedule changes in response to a crisis. By providing resources for policy makers Dr. Sullivan said the goal is to help those coming in to the Presidency as well as those who work in the Presidency. He concluded his presentation by asking for questions.

Mr. Blackwood mentioned that the Reagan and George W. Bush Libraries each have a program that uses the setting of the White House Situation Room for school groups to engage in experiential learning scenarios based on crisis management. He asked Dr. Sullivan how much data his program has on crisis management in the Situation Room. Dr. Sullivan replied that his program focuses less on the uses of specific rooms and more on the President’s schedule in a crisis. He added that while the program is still developing database resources the preliminary finding is that Presidents try to avoid changing their daily routines because of the many other demands they face during crises. He suggested that in most cases one will find Presidents do not spend much time in the Situation Room. Mr. Lowe commented these are the kinds of details needed to make the Situation Room scenarios as realistic as possible. Dr. Sullivan responded the research shows Presidents tend to bring in more people during a crisis, when one might expect them to narrow their interactions.

Mr. Burden asked if Dr. Sullivan has anecdotal information on all Presidents during crises. Dr. Sullivan said he does not, but that his team is working as hard as they can with resources available for their research.

Holly Kuzmich (George W. Bush Foundation) asked what the expected products will be from the Project’s efforts in 2017. Dr. Kumar said the Project is adding a number of additional White House offices to their research and analysis. In addition, White House Transition Project staff are writing analytical pieces and updating pieces like on topics like Budget in the White House.

Mr. Ferriero commented that the Project’s proposed programs focus on three Libraries. Dr. Sullivan replied the topics at each site were generated by scholarly interest at the local

universities. Dr. Kumar added the Project's goal is to have a confluence of interest and expertise among a Presidential Library, its Foundation, and a local university. Felicia Wong (of the Roosevelt Institute) asked about the goals of the Project. Dr. Kumar responded the goals are to provide information to White House staff as well as to scholars and the public. Mark Updegrove added his understanding of the proposed programs at the Presidential Libraries in Texas is that the programs have a primary audience of media stakeholders with a secondary general audience component.

Public Comment

The Archivist opened the floor for public comment or questions. No comments / questions were offered.

Next Meeting

Ms. Donius said the next meeting of the Advisory Committee will be held in Washington, DC, in the fall, with more details on the meeting to be provided soon.

Action Item Summary

ACTION ITEM 1: NARA will share documents describing NARA standards (as referenced in the draft Guiding Principles document) with the group.

See *Attachment A: Borrowing NARA Holdings for Exhibition.*

ACTION ITEM 2: Foundation representatives interested in participating in the subgroup to review the draft Guiding Principles document should contact Susan Donius.

Foundation representatives who were interested in participating in the subgroup contacted Ms. Donius. The Archivist asked William Baribault, Stephanie Streett, and Larry Temple to serve on this subcommittee. Larry Temple agreed to serve as co-chair.

ACTION ITEM 3: NARA will share its traveling exhibit market research with the Foundations.

See *Attachment B: Archives Traveling Exhibits Service (NATES) Traveling Exhibits Market Research Report for 2014-2016 (January 31, 2017)*

ACTION ITEM 4: NARA will ensure the outreach attendance reporting at the Ford Museum and other sites includes all programming and events supported by the agency's performance reporting guidance.

On February 29, 2016 the Ford Museum staff confirmed that the Museum is reporting the full scope of all programming and event attendance in accordance with NARA's performance reporting guidance.

ACTION ITEM 5: Foundation representatives should contact Jim Gardner with any ideas for potential projects that could become components of the National Outreach Program.

Foundation representatives were in touch with Mr. Gardner directly before he retired.

ACTION ITEM 6: NARA will share with the Advisory Committee the projected exhibit schedule it shares with the National Archives Foundation.

See *Attachment C: National Archives Exhibit Schedule*