

## PRIVATE OFFICE HANDBOOK

*[This document was issued to Private Office staff in the Department of Trade and Industry around 1992. Advice re security and some minor text (such as phone numbers) has subsequently been amended or deleted. The PPS is referred to as 'he/him' because this version was issued by a male PPS. The document has also been reformatted.]*

"A clerk in a Public Office may not even dream of fame to be acquired in that capacity. He labours in an obscurity as profound as it is unavoidable. His official character is absorbed in that of his superior. He must devote all his talents, all his learning, to measures, some of which he will assuredly disapprove, without having the slightest power to prevent them; and to some of which he will most essentially contribute, without having any share whatsoever in the credit bestowed on others, which his pain has earned for them; and if any accident should make him notorious enough to become the suspected author of any unpopular act, he must silently submit to the reproach, even though it is totally unmerited by him.

These are indeed the indispensable disadvantages of the position of a clerk in a Public Office, and no man of sense and temper would complain of them. But neither will any real man of mental power, to whom the truth is known beforehand, subject himself to an arduous examination in order to win a post so ill paid, so obscure, and so subordinate or, should he win it, no such man will long retain it."

*Sir James Stephen, Parliamentary Papers 1854-55 (Vol XX, Papers on the Reorganisation of the Civil Service)*

Perhaps jobs in Private Offices are no longer quite as unpleasant as Sir James indicated. But they are still unusually demanding and stressful.

This handbook is intended to make our jobs easier and more pleasant by passing on rules, advice and information from one generation in Private Offices to another. The handbook is issued to all new entrants to Private Office and is issued to you on a personal basis. Please help to keep it up to date and useful by suggesting additions and amendments to the Principal Private Secretary.

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## Part 1 - THE PRIVATE SECRETARY

The job of Private Secretary (PS) can feel very demanding and pressured. You are constantly making very visible decisions as you précis the views of officials or Ministers, draft notes of meetings, plan the Ministers' diary or deal with staff matters. You can never please everyone and sometimes it will feel as if you can please no-one. This section gives you some tips on how to survive. In short:

- identify and use the resources at your disposal,
- be clear about your task, and
- don't worry if you make minor mistakes

Your resources are your time, your immediate team, and other Private Office and departmental colleagues.

You should constantly review how you are using your time. Private office routines take up surprisingly little time. Ministers reply to about 300 letters a week - that averages only about 5 per day for each of the 12 PSs and APSs. Meetings and meeting notes can be time consuming, but Ministers are often out of the office and again the burden can be shared with colleagues, including Divisional note-takers. The real time-eater is the never ending stream of phone calls, conversations and miscellaneous jobs. The answer is to take care not to take on too much. There are 4 or 5 other people in your team, over 40 others in Private Offices and Parliamentary Branch, and over 11,000 in the Department. Your job is to use and add value to those resources, not do everything yourself

It is important that you get home at a reasonable time, get plenty of sleep, enjoy leisure activities and take holidays. If you don't then you will get tired and stale, you will work less effectively, work even longer hours and so get into the vicious spiral of the workaholic. If you feel that this is happening then take time out to plan changes which will help you and your team to work more efficiently and effectively.

For instance:

make sure that each member of the team knows their responsibilities, and in particular has a job description and job plan with personal objectives (see Annex I)

make sure that each member of the team has responsibilities which are appropriate to their skills and experience. Delegate and divide work so that everyone is slightly stretched by the difficulty of their work, and everyone is

working equally hard. For instance, it is sometimes sensible to divide "your" Divisions between yourself and your APS. But sometimes this is illogical, if most of your Divisions contain a mixture of more and less difficult work. A more flexible split might then be needed. And if someone is getting bored, or appears under stretched compared with colleagues, give them a little more to do so that they find the job challenging and interesting, and so as to relieve the pressure elsewhere. Above all, do not underrate staff who are more junior than you. They might be just as clever as you, but might not have yet reached your grade because they lack training or experience. You should help them gain that experience by delegating to them as much as possible, monitoring how they do their job and, if necessary, telling them how the job might have been done better.

indeed, you should monitor the performance of the whole of your team, gently but firmly. It is your job to set and maintain standards, although you should if possible discuss your proposals with your team before making changes. And everyone in your team should know how they are rated by their reporting officer. It is vital that the annual report does not come as a shock.

but ensure that help is made available if they are getting out of their depth, or if you or someone else could do the particular task much better, perhaps because of your training, experience or "clout".

Do not hesitate to seek help and advice from Private Office and Parliamentary Branch colleagues. They have a wealth of experience and, if that fails, they will at least have some ideas about what you might do to overcome the problem of the moment. And in an emergency you can call on the resources and experience of the whole Civil Service via No 10 or the Cabinet Office, although normally you would not do this without first consulting the Principal Private Secretary and/or the Private Secretary to the Permanent Secretary.

But many problems melt away if you simply ask for advice from departmental officials. You will find that everyone from the Permanent Secretary down is very ready to help, whether the problem is mind-boggling or mundane. They know very well what pressure you can be under. In particular, do not struggle for hours trying to understand a very complex issue. Officials will be glad to explain it to you, and/or check your draft notes of meetings etc. It is in their interest that you get it right.

Here are a few observations about your task.

A draft job description is at Annex I.

Your main task is to oversee the communication of officials' views to Ministers and

vice versa. You have a duty to ensure that your Minister does not take a decision until (s)he has had access to the written and oral briefing that you and (s)he consider necessary, bearing in mind any time constraint and the importance and complexity of the subject.

You will often need to summarise - when preparing notes of meetings or when communicating officials' views to Ministers or vice versa. It is then permissible to **emphasise** particular points and **stress** any action needed. But never distort or exaggerate.

And take care not to attribute too much importance to "obiter dicta". Ministers, like the rest of us, are prone to air their views on a wide range of subjects - including people - in the middle of conversation about a scarcely related subject. These comments are not decisions, even if they sound like them. They are often best ignored - if you are sure that the Minister will not two weeks later ask what you have done about, say, "the decision he took at that meeting on unemployment in the regions". If in doubt, or if you think that officials ought to know what your Minister is thinking, you might minute that "The Minister wondered whether [the whole of the Department might move to St Ives]. He would be grateful for your advice."

Looking more widely, remember that you have three clients or customers (The Principal Private Secretary (PPS), your Minister and your staff) and the requirements of the three can sometimes conflict.

If there is any serious conflict then your overriding responsibility is to the Principal Private Secretary who is your line manager and reporting officer. He will help you resolve problems and will set the standards and procedures to which you will work, in consultation if necessary with the Secretary of State and the Permanent Secretary. You will meet the PPS about once a month in a TLO management meeting with colleagues, and separately once a month on your own. **You must also draw to his attention any matter which is troubling you.** It is an important part of your job to give early notice of a potential problem - including a staffing problem, or a problem involving your Minister or officials, or a personal problem. Often there is nothing immediate to be done, but early warning allows both you and the PPS to think through the options so that, if and when action is necessary, it can be approached in a planned and thoughtful way, and not as a crisis.

But for most of the time you will be working to your Minister, to whom you should show considerable loyalty. **It is important that you frequently check to see that your Minister is content with the service that you are providing.** Rather than ask outright, which makes it difficult for the Minister to reply negatively, you might ask whether there is anything that you are doing that (s)he would rather be done differently, or whether there is any procedure that (s)he would like changed. It is particularly important that you ask this sort of question soon after you take over a

new Minister, either because of your or their arrival in the office.

If you are the newcomer then the Minister will have chosen you and will have a vested interest in ensuring that you are a success. But you will also have a lot to learn, so keep asking whether there is anything that you or colleagues could be doing differently. And make a point of getting to know him or her, in particular by going on a long trip with them.

If the Minister is the newcomer then you are on a very difficult wicket, for three reasons. First, (s)he has no loyalty to you - and indeed might well be suspicious of you. Second, the personal chemistry might well be wrong - and there is little you can do about that either. Third, (s)he will have a different work style to his/her predecessor - but this might give you the opportunity you need to get on their wavelength. Make sure that you find out how the new Minister likes you to work, and then deliver what they want. If you do this quickly and tactfully then (s)he may begin to feel responsible for you and to like you. Then get a long trip under your belt and your tenancy might be secure. But don't despair if it doesn't work out. It is not pleasant if you have to leave Private Office because you are not getting on with your Minister. But it will not damage your career if you have done a good job but then run up against someone whose style is different from your own.

You have important responsibilities to your staff. The need to stretch them and develop their potential is touched on above. But you must also ensure that they, like you, do not work too hard or neglect their family and friends. They need to be trained and properly and promptly reported upon. Do not neglect them. They will not only become your friends. They are also your most important resource.

Finally, don't worry about the fact that you will make quite a few mistakes. You will make lots of decisions and some of them are bound to be wrong. Ministers and officials are very forgiving if the mistake is small, isolated or easily corrected, for instance by issuing a revised note of a meeting.

It follows that you should concentrate on avoiding big mistakes: i.e.:

It does not matter too much if the Minister misses a train to Reading. There will be another in a few minutes. But it does matter if (s)he misses the plane to Japan. Make sure the driver allows plenty of time for the journey to Heathrow, and then add another 30 minutes!

It does not matter too much if there is a mistake in a standard letter to a member of the public. A swift apology will usually put matters right. But the omission of the word "not" from a letter to a Ministerial colleague could be disastrous. Check it carefully!



indicate the name and telephone number of the main contact both in the Department and, if appropriate, at the host company, for convenience of anyone who needs to consult the diary in the diary secretary's absence. Papers on each engagement should be kept together and readily accessible by reference to the date of the engagement;

- Avoid over-crowding. Review the diary regularly, including with the Private Secretary and/or the Minister. Be active and not just reactive. Identify, and give priority to invitations and meetings which will help the Minister to pursue his or her policies; and, above all,

- **Watch his or her back** by keeping a file on each engagement in which is recorded exactly what the diary secretary told the Minister and officials, and what they agreed to.

#### POEMS Computerised Diary

The POEMS computerised diary system was installed in Private Office in 1990. It allows Ministers' diaries to be compared and highlights free periods when meetings may be arranged. Printed copies of a Minister's diary for any selected day or period may be produced at the touch of a button and specially formatted daily diary cards are produced for the Minister's personal use.

The Diary Secretary is responsible for maintaining and updating the system but should ensure that everyone in the office can access and use the computer.

#### Distribution of the Diary

The Diary Secretary should prepare a daily diary, and circulate it the evening before and, on Fridays, circulate a fortnightly diary. The Secretary of State's office issues a weekly list of Ministers' speaking, press and out of town engagements.

The daily diary should be sent to:

- all Ministers,
- the Special Advisor(s),
- the Minister's spouse,
- the Minister's constituency secretary,
- the Minister's PPS,
- the Minister's driver,
- the Permanent Secretary,
- Information Division,

- the Parliamentary Clerk,
- the messengers,
- the Security Officer,
- appropriate senior officials; and, if appropriate,
- the Minister's protection officer and constituency police.

Diaries should be classified **RESTRICTED OR ABOVE**, if appropriate. Discretion should be taken in describing sensitive or personal engagements. (This applies to the whiteboard as well).

Always remember to keep the Minister's driver informed of his or her movements and any changes in the diary.

### Diary Checklists

A series of checklists has been prepared, drawing on the experience and expertise of past and present Diary Secretaries. They are intended to be useful but are certainly not exhaustive; and any additional tips would be very welcome. The checklists are intended to indicate a basic order of events and to highlight certain details which must not be missed, e.g. form of dress for a dinner, the need to write to an MP when you will be visiting his/her constituency).

The checklists are annexed as follows:

	Annex
Domestic Engagements (Office or London)	A
Engagements Outside London	B
Incoming Visits by Overseas Ministers	C
EC Councils	D
Overseas Visits	E

### Ministerial Absences

Depending upon the length of absence, these should be cleared with the Secretary of State and the Whip's Office as far in advance as possible. During the Parliamentary Session, at least one Commons Minister should be available in the Department each Friday until 10.30am. The Diary Secretary of the Parliamentary Under Secretary of State for Corporate Affairs currently co-ordinates this and Ministerial cover during the major holiday periods. Cover should be at Minister of State level when the Secretary of State is absent on longer overseas visits or on holiday.



The relevant Heads of Divisions should be informed if a Minister is not going to be able to take a box for a period exceeding 24hrs. If this is not done then they are entitled to expect that the Private Office will get urgent work to the Minister or will get another Minister to deal with it.

## **INVITATIONS**

### Telephone Enquiries

The Diary Secretary should never commit the Minister to an engagement without first consulting him or her and, if appropriate, officials. If an organisation telephones asking whether the Minister would be free for an engagement, always ask the person to write giving full details - unless the Minister will definitely not be free, in which case the enquirer should be told.

It may sometimes be necessary to fix an engagement at short notice over the telephone but the Diary Secretary should always first consult the Private Secretary, the Minister and, if appropriate, officials - and immediately minute out to officials to record the arrangement.

### Written invitations

The Diary Secretary should show the Minister all important invitations or, depending on the Minister's preference, all invitations, however important. Any views expressed by the Minister should be conveyed to the action officer, who should also be told whether or not the Minister is free to attend.

The Diary Secretary should send the top copy of the invitation to a nominated action officer and copies to other interested Divisions.

If the engagement is likely to involve a speech or other elements of media interest, the invitation should also be copied to Information Division.

If there seems to be a specific regional interest, the invitation should also be copied to the relevant Regional Office, who should be kept informed of progress.

### Replying to invitations

Replies should be sent within seven working days of receipt of the invitation. If a substantive reply cannot be sent within this timescale or if the Minister wishes to keep options open, a holding reply should be sent.

When accepting an invitation (unless in the recess), the Diary Secretary should always make clear that acceptance is subject to Parliamentary business. Generally, Ministers do not like letting people down once they have accepted an invitation but they have no qualms in doing so for Parliamentary business.

Officials may advise that another Minister should accept the invitation. In such cases, the other Minister's Private Office should be consulted before replying.

### Initiating invitations

Generally, officials should be consulted before an invitation is initiated at the Minister's request. The Diary Secretary should check on the Private Office Network that there is no duplication with other Ministers.

## **ENGAGEMENTS**

### Speaking Engagements

Where the Minister is to make a speech, the Diary Secretary should:

- Ensure that officials know how the Minister likes his/her speeches
- Remember to note that a speech is involved in the appropriate section on the computerised diary entry;
- Consider with the Private Secretary whether the arrangements regarding length of speech, order of events and so on make sense;
- Allow plenty of time (at least three days before the engagement) when arranging meetings to discuss the speech and setting a deadline for submission of the draft to enable revision and preparation of the final version. Allow more time if the speech has to be sent to an overseas post and/or translated.
- Keep in touch with the Press Officer about the possibility of a Press Notice.

## **BRIEFING FOR ENGAGEMENTS**

The Diary Secretary should consider how long in advance the Minister will need to study the briefing for each engagement. This may vary from several days (e.g. for Select Committee) to the night before. Take account of absences.

The Private Secretary is responsible for ensuring that the Minister's box contains all the papers the Minister will need for the following day's engagements and meetings, but the Private Secretary will expect them to have been collected and collated by the Diary Secretary.

The Diary Secretary should identify engagements for which the Minister will require oral briefing from officials. When arranging oral briefings, the Diary Secretary should allow enough time for further written briefing or revisions to be provided as necessary.

For some engagements, e.g. Oral PQs, Parliamentary debates and Cabinet Committees, oral briefing may be wanted as a matter of course.

## **OVERSEAS TRAVEL**

### General

Visits to promote trade and inward investment are proposed by the relevant divisions in the framework of the Ministerial overseas visits programme, currently coordinated by the Deputy Secretary in charge of the Overseas Trade Divisions. This programme is periodically approved in principle by the Secretary of State.

Normally an overseas visit will be proposed by the OT desk in a submission which may well have already been discussed informally with the private secretary. If the possibility of a visit arises in some other way, advice should be sought from the relevant division who will at this stage consult the overseas post informally.

A Diary Checklist is at Annex E.

### Secretary of State's Visits

The Secretary of State's consequent absence from Cabinet must be cleared with the Prime Minister. If he or she will miss First Order PQs, the Opposition spokesman should be notified.

The outcome of a longish trip should be reported to the PM.

### Other Ministers' Visits

The Private Secretary must seek individual approval of a trade etc. promotion visit from the Secretary of State and then from the Foreign Secretary.

The Minister should report to the Secretary of State on the outcome of an overseas visit within a reasonable time after his or her return (preferably one week, or sooner). The Private Secretary who accompanied the Minister on the visit should ensure that this is done, usually by a minute, normally drafted by the accompanying official from the OT desk.

The arrangements for regular overseas business such as EC Councils, Summits and other Ministerial meetings do not require the same procedure but the Secretary of State must be given advance notice of the Minister's intention to attend.

### Ministers' spouses

Guidance on when it may be acceptable for a Minister's spouse to accompany the Minister on an overseas visit at Departmental expense is given in a minute dated 11 July 1983 from the Permanent Secretary (Available from ...).

The justification for the request (ideally including a draft programme for the spouse) should be set out at each stage.

After approval for the visit itself has been obtained, clearance should be sought as far in advance of the visit as possible for the Minister's spouse to accompany him or her at public expense. The Private Secretary should:

- 1 Check that the Private Office's T&S budget can accommodate the cost;
- 2 Minute the Permanent Secretary seeking approval;
- 3 Minute the Secretary of State enclosing a draft minute for PS/Secretary of State to send to PS/Prime Minister seeking approval.
- 4 Await PS/PM's reply.

If the Minister's spouse is to accompany at the Minister's own expense, this should still be mentioned when seeking approval for the visit. The post must be kept informed, via the OT desk: if asked, they will normally be able to draw up a separate programme of visits for the Minister's spouse.

Non-Governmental representatives (e.g. from business, the City etc.) invited to accompany a Minister on an overseas visit do so at their own expense.

### VIP Travel & Heathrow

Ministers frequently use the VIP lounges at Heathrow both for their own

outward/inward journeys and meeting/speeding foreign visitors. The VIP lounge should be reserved in advance (.....) and, in advance, Private Office should also inform Heathrow by fax (.....) which cars are to be admitted into the VIP lounge area.

VIP reservation means that the appropriate number of seats on the plane are reserved 24 hrs in advance. It is therefore possible to arrive at the lounge up to c15 mins before take off. But the lounge staff will release the seats unless they know you are on the way. You should therefore telephone from the car to say, for instance, that you are on the Cromwell Road. If you are delayed by traffic, ring again to see if the lounge staff can keep the reservations open and speed you through Heathrow even more quickly than usual.

But, even with VIP treatment, you must leave 1 Victoria Street 75mins before take off time to be reasonably sure of catching the plane (longer in the evening rush hour). Do not leave any later even if the traffic is expected to be light, for road works in West London or delays on the M4 can cause serious and unpredictable delays.

### **Part 3 - ACCOMPANYING A MINISTER OVERSEAS**

Although no two visits are alike, the following points are worth bearing in mind when accompanying the Minister overseas.

On arrival, you will normally be met by local FCO staff (you should know in advance who this will be and advise the Minister). You should be ready to give the FCO official the passports and luggage reclaim tickets for the whole party. This will enable them to clear the party through passport control and Customs and deliver the luggage to the right rooms. It is essential that you can describe and identify all the party's luggage - best of all produce a list of it.

If the Minister is giving a speech, the text should ideally have been sent ahead to the Post. If not, the local FCO press officer will need a copy very soon after the Minister's arrival so that a Press release can be prepared.

You should always have several gifts handy so that if the Minister is presented with a gift during the visit he/she can reciprocate if he or she wishes.

It will help you a great deal to get meeting notes done as you go along, rather than leave them until you return but check with the local Post about security. Some Posts will be understandably nervous about dictation in your hotel room, but they can always find a secure room for you in the Embassy.

Some meetings will justify a telegram back to London.

You should also check as you go along on whose budget (FCO or DTI) the various expenses incurred during the visit should fall, as there are some grey areas. If the host Government is paying the Minister's hotel bill, establish with the host Government's protocol office exactly what is covered.

It will help you if, before you leave, the Post provides a list of those to whom the Minister should write thank you letters on his/her return. (He or she should also write to the Post itself and to the Ambassador's wife if he or she stayed at the Residence).

You should also check whether onward flights for the Ministerial party need to be reconfirmed - if it is necessary then the hotel or the Post can do this for you.

It is essential to keep a close watch on papers, and to ensure that briefcases are lockable, and kept to hand at all times. It is sometimes necessary to ascertain where it is safe to talk openly. The Post can advise on this point.

You should ensure that you have sufficient local currency at all times. It may be possible to get some in the UK, but note that it may be disadvantageous in countries with very high inflation as this usually goes with a depreciating exchange rate. In any event, it is impossible to get local currency in the UK for some countries. In these circumstances, you might check which is the most popular "hard" currency and take some of that (e.g. US\$ in Latin America, DM in Eastern Europe). If you are staying at an Ambassador's or High Commissioner's residence, it is normal to leave a tip for the staff. The post's administration department will be able to advise on the amount.

### The Role of the Private Secretary

Overseas visits can be fun. But for Private Secretaries they prompt questions such as "why do I exist?" and "how much longer am I going to have to stand here talking to this very boring person and where is the waiter with the drinks tray?"

The fact is, despite the exciting prospects of foreign travel, the pecking order of importance in the Ministerial party places the PS at the bottom. But do not despair, there is plenty you should be doing. First, before you leave, make sure you know all there is to know about the arrangements. Ministers will rarely have focused on the minutiae and will ask, in front of assembled officials, "how long is this next flight?" A Private Secretary scrabbling for their notes in their bag in the overhead luggage rack scores as many points as the worst entry in the Eurovision Song Contest.

Other questions the Minister might typically ask as the 'plane taxis towards the terminal are "Who is meeting us?", "What's his position?", "What do I call him?", "Is

the Ambassador married?", "What's his wife's name?", "What's the Ambassador's background?" and so on. You cannot be expected to know all the answers but make sure that the Minister can be confident that you know what you are doing and what is going on.

Once off the 'plane, Post staff will take over the arrangements and will probably hand you and your Minister an itinerary which will reflect the latest developments in the arrangements.

Your main role is to keep in touch with the office in London. At times this will be straightforward: at others, time zone differences and the varying quality of a country's telecommunications can cause frustration and delay (and hunger if you miss your lunch waiting for a booked call).

Subject to the above, you should offer to share the burden of note-taking with DTI officials and the Post, aiming for equal proportions each.

Quite often, Ministers like to take businessmen with them. This can cause logistical headaches for the Division and the Post. Do what you can to help because the Minister will want the businessmen and women to feel wanted and to be well looked after - you can keep your eye on this for the Minister, who will consider the business representatives to be the most important people on the trip. But they are not your responsibility. Your Minister and communications with London come first.

And, of course, there are all the finicky things - looking after the tickets, carrying the gifts, paying the bills and so on. Here you are simply the bag man, but it is part of the job and it is important.

Finally, as a general rule don't "fuss" round your Minister. As long as you demonstrate calm and control you will find that everything you do will be useful and you won't feel like the proverbial fifth wheel; and remember too, that Ministers are usually quite grown-up and have probably traveled before.

#### **Part 4 - GIFTS**

All gifts, whether to the Minister, yourself or others in the party have to be notified in writing to PM4a (...), copied to the Permanent Secretary, indicating: what the gift is; who gave it and when; its approximate value (if necessary, PM4a can arrange a valuation). Keep a "gift log" in the office recording the same information.

According to "Questions of Procedure for Ministers" (Section VIII), the gift should be handed over to the Department (PM4) unless its approximate value is less than £75 or, if the recipient has reciprocated and paid for a gift of equivalent value, in which

case it may be kept, after its receipt has been notified as set out above.

If the approximate value is more than £75, and there has been no private reciprocation of the gift, the recipient may purchase the gift at its cash value, abated by £75. Alternatively, the recipient may choose, where this is appropriate, to display or use the gift in the Department.

If the disposal of the gift would cause offence or if it might be appropriate for the recipient to use or display the gift on some future occasion as a mark of politeness, it may be retained in the Department for up to five years.

## **Part 5 - CORRESPONDENCE**

### The Role of the Correspondence Clerk

The Correspondence Clerk is responsible for ensuring that all correspondence is dealt with promptly and correctly. Letters to Ministers are important documents, often written by MPs, which require responses on matters which are of concern to individuals. Always remember that each Ministerial reply will be closely read by the recipient (usually a member of the public who will have written to his/her MP) who will be offended by delays and mistakes - if we get it wrong, it is the Minister who will be criticised; it is vital, therefore, that Ministerial correspondence is never treated lightly.

### How to Process Correspondence

Given the sheer number of letters which a Minister receives each day, it is important that the processing system is efficient and effective.

To process Ministerial correspondence:

#### The Correspondence Clerk:

- 1 Date stamps the original incoming letter;
- 2 Writes a copy list and action officer on the original letter;
- 3 Copies the letter, passing one copy to the Private Secretary, who will check the copy list and action officer;
- 4 **Reads the entire letter** (This is vital);
- 5 Decides how long to allow officials to take to provide a draft reply (Normally five working days, though this may not always be appropriate for all correspondence -



some will be rather more urgent and may require very rapid turnaround;

6 Places the original letter on case file and dispatch, as appropriate, to Division (via 12.00, 16.00 or last post) or Regional Office (fax);

7 Ensures that the draft reply is returned on time, or, if it is not, that officials either provide a very good reason for the delay or a draft interim response;

8 Date stamps the case folder, containing draft reply, on its return to the office;

9 Inputs details on computer and passes the case folder to;

The Private Secretary, who

10 Amends/approves draft and, if necessary, passes the case folder to;

The Secretary, who

11 Amends and prints the final version, using the disk submitted with the case folder, and passes the case folder to;

The Correspondence Clerk, who

12 Proof reads the letter and passes the case folder, via the Private Secretary, to the Minister, who signs the letter, and returns the case folder to the Private Secretary, who returns it to;

The Correspondence Clerk, who

13 Copies the letter;

14 Inputs details onto the computer;

15 Dispatches original and copies, and returns case folder to Division (with copy of letter).

This system enables Ministerial correspondence to be handled quickly and efficiently. It is very important that the system is followed.

But there will be plenty of things for the Correspondence Clerk to watch out for in addition. Some helpful points are set out in three checklists:

Annex

Incoming Correspondence	F
Outgoing Correspondence	G
Who Writes to Whom ?	H

**DIARY CHECKLIST: Domestic Engagements (Office or London)**

If invitation accepted, confirm date, time and venue with other party/organisers.

Confirm details with officials. Request written briefing and speech if necessary.

Record speaking engagements on central computer long term diary.

Check venue: need to book room/table ? Car parking/car pass arrangements ? (Car stickers are needed e.g. for Lancaster House and Chequers). Map/meal for driver ?

Confirm which PS/officials attending; tell organisers.

Arrange oral briefing if wanted.

**Visitors coming to Department**

Confirm names of all visitors and pass to reception one day in advance (tell front desk if same day).

Inform office keeper if visitors cars using front car park: give number(s).

Ministers from other Departments, overseas Ministers and very senior visitors should be met at the front desk by a member of the private office staff. Always be waiting five minutes before they are due to arrive. If possible check that you know what the visitor looks like.

Buffet/working lunches in Department: contact Entertainment Section (...) who will arrange for caterers to supply requirements and/or quotations. One week's notice is desirable but only 48 hours essential. Entertainment Section can also provide advice on outside venues with private rooms suitable for Ministers' official entertainment.

**Evening Engagements**

Minister's spouse attending ?

Dress: Lounge suit/black tie/other/decorations?

Write to Whips ? Need to register pair/bisque/obtain exemption ?

### **Dinners/lunches which Minister is hosting formally**

Guest list to be approved by Minister in case (s)he wishes to delete or add guests.

Menu to be approved by Minister. Check any special dietary considerations for Minister or guests (e.g. vegetarian; health; religion).

Seating plan approved by Minister.

Final guest list and personality notes on principal guests.

Will the Minister need to make welcoming speech ?

### **The Driver**

The Minister's driver does not have to drive him or her to primarily political engagements. If in doubt, seek advice from the Secretary of State's office.

- Car window stickers for ensuring parking spaces are sometimes provided for functions in Central London. The Diary Secretary should ensure these are passed to the Minister's driver.

In London, the Minister's driver is normally responsible for arranging a suitable substitute driver if he or she is unable to drive that day. If, for any reason, the Minister's driver is not able to arrange a substitute the Diary Secretary should do so with the Government Car Service (GCS).

**DIARY CHECKLIST: Engagements Outside London**

Copy in Regional Office and Information (who will if necessary contact Central Office of Information Division/region) when seeking advice on a visit/invitation.

Inform the constituency MP of the visit at least one week before hand.

Inform the Secretary of State for Scotland or Wales as a matter of courtesy if the visit/engagement is in Scotland or Wales.

Record on long term diary section of computer. Request speech (if necessary) and briefing.

**If in Parliamentary time:**

(a) Inform Whips;

(b) On Friday beforehand, if necessary register pair, or obtain exemption.

Confirm PS/official accompanying. Confirm whether Minister's spouse attending.

Arrange travel from/to London (air/rail via .....). Make arrangements for local transport/accommodation with regional office/organisers as necessary.

Confirm details with organisers.

For evening engagement, check dress.

Confirm media arrangements with Minister and COI regional office (via Information Division).

**Regional Visits**

Regional office (RO) to provide programme and clear with Private Office/Minister one month in advance. Private Office arrange travel to and from region. RO make all other arrangements. Check with Regional Office who is responsible for paying hotel and other bills.





**DIARY CHECKLIST: Overseas Visits**

- Who is going?

Minister  
Spouse

At own expense?  
At Department's expense? (need  
to obtain authorisation)

Private Secretary  
Press Officer  
Official(s)  
Non-Governmental representatives

- Minute PS/SoS seeking clearance for visit(s) (if possible mention which Ministers are to cover Parliamentary and Ministerial duties).
- On receipt of SoS agreement write to PS/SoS FCO seeking permission and clearance for the visit. Mention the visit has SoS approval and also that of post(s) if obtained. If necessary copy letter to PS/Prime Minister, PS/Chief Whip, PS/Secretary to the Cabinet. Record visit on long term diary section of diary.
- If the visit is in Europe travel is in Club Class, if long haul then First Class.
- Check with Minister that travel arrangements are satisfactory; submit an application for overseas travel .... requesting travel bookings and sterling advance, quoting appropriate ledger heading and cost centre code.
- As soon as possible check whether any inoculations or anti-malaria courses are needed. If so arrange appointment with the Occupational Health Service at Murray House (273 3000) two months before visit if possible.
- Check passport validity, are visas required?; if so fill in appropriate forms, liaise with desk. If there is a need to obtain photographs arrange time in the diary two months before visit if possible.
- If businessmen are to accompany Minister arrange with the country desk for draft letters of invitation. Arrange briefing meeting and if needed debriefing on return.
- Ensure country desk are aware of deadlines for briefing and speeches. (If needed arrange meetings to discuss speech opportunities).
- Within three weeks of departure if possible, consult the country desk on the need for



gifts and if so, what would be suitable. Arrange for advance purchase of gifts. If time allows send them by bag to Post to await your arrival (saves carrying). (If the Minister is staying in an Ambassador's residence (s)he will usually take a personal gift for the hostess).

- Check with the desk what clothing is necessary: check with PM if any clothing allowance is in order for Minister and PS (and Minister's spouse if at Departmental expense) one month before visit.
- Several weeks before the visit and before briefing gets under way divisions submit an outline steering brief setting out the reasons for the visit and the main objectives, together with proposals on how the briefing will be structured. This will be discussed briefly with the Minister to determine what form the briefing should take. Arrange final briefing meeting with officials two/three days before visit.
- Check with desk if any meetings both before and after are needed with Ambassadors.
- Speak to Press Office about Radio, TV, Press interviews before and on return (and if Press Officer is not to accompany during visit). Keep in constant touch, copy all relevant papers.
- If necessary arrange with Security Section (currently .....) for Couriers, passport and waybill. She will also be able to arrange for the PS "bag" to be "sealed". ... needs to be contacted four weeks before the visit.
- If necessary arrange VIP lounge outward and return direct with airport (Heathrow is 081 745 7171) five days before.
- Friday before check with Whips office that visit is still possible from a Parliamentary point of view.
- Two days before Check: briefing, speeches, presents, visas, passports, tickets and money.
- Arrange PS/pack to include, depending on the length of the visit, Visiting cards/compliment slips/forward diary. CV's, diplomatic staff lists. Gifts. Spare copy of briefs and speeches. Prompt cards and folders for specific meetings (depending how your Minister likes briefing presented). Letter headed paper etc. If necessary economic forecasts, Treasury briefs, trade figures, any relevant recent PM or SoS speeches. Relevant extracts from ABC Airway Guide.
- Keep in the office a detailed itinerary giving telephone numbers and time differences.





### Privy Councillors (PCs), e.g. all Rt Hon MPs

Normally another Privy Councillor unless the correspondent has written direct to a Junior Minister.

### Cabinet Members

Normally the Secretary of State unless away/on leave/abroad, or if the correspondence is on minor or constituency matters or on areas very specific to individual Ministers. Letters to Cabinet Ministers, acting in that capacity and not as constituency MPs, should be cleared through the Secretary of State's office; this ensures the SoS is not caught out by colleagues raising matters relating to this department of which (s)he is unaware.

### No 10

The Secretary of State's office. If not, letters should be cleared with that office before they are sent. This ensures that the Prime Minister is unlikely to raise departmental matters of which the Secretary of State is unaware.

### Company Chairmen

A Minister.

### Other Company Officers, e.g. Chief Executives

Discretion must be applied; it may be more appropriate for a Private Secretary or an official to reply.

### Members of the public

An official unless there are exceptional circumstances. Again, discretion must be applied. Watch out for letters that look like "treat officials" but are either from a friend of the Minister ("Dear John" is a bit of a giveaway) or a constituent (look at the address).

### Constituents

If concerned with an issue for which the Minister has responsibility, the Minister can answer it as a Minister. If not, but on a subject for which another DTI Minister is responsible, the letter should be referred back to the Minister's constituency secretary.

## ANNEX I

### SPECIMEN JOB DESCRIPTIONS

#### Private Secretary

##### Purpose of the Job

To ensure that the Department provides the Minister with the service he or she requires, to organise his official duties and to keep the Department and other private offices informed of their views and activities.

##### Main Duties

Communicating the views of the Minister to the Department on issues relating to his/her responsibilities, and vice versa. This includes ensuring that the Minister has well-prepared, well-presented and timely advice and briefing.

Management and supervision of [staff], and in particular the Diary Secretary, including responsibility for their personal career development.

Recording discussions and decisions taken at Ministerial meetings.

Accompanying the Minister as he travels in the UK and abroad.

Presenting (or advising on the presentation of) the Ministers views to those outside the Department, in speeches, press notices, correspondence, etc.

##### Examples of Specific Objectives

To ensure that [a new member of staff] is trained to [do their job] by [date].

Organise a staff development programme so that [a number of discussion sessions are held] by [date].

To take on responsibility for, and to become effective in [a new area or type of work] by [date].

To improve knowledge of [a foreign language] by [having a number of lessons] by [date].

To improve understanding of [a policy area] by [reading, attending a seminar or course] by [date].

To undertake [a [management] training course] by [date].

### **Assistant Private Secretary**

#### Purpose of the Job

To assist the Private Secretary in order to ensure that the Department provides the Minister with the service (s)he requires, organise official duties and keep the Department and other private offices informed of his/her views and activities.

#### Main Duties

Communicating the views of the Minister to the Department on issues relating to his responsibilities, and vice versa. This includes ensuring that the Minister has well-prepared, well-presented and timely advice and briefing.

Management and supervision of staff, including responsibility for their personal career development.

Recording discussions and decisions taken at Ministerial meetings.

Accompanying the Minister as (s)he travels in the UK and abroad.

Presenting (or advising on the presentation of) the Ministers views of those outside the Department, speeches, notices, correspondence, etc.

#### Examples of Specific Objectives

To ensure that [a new member of staff] is trained to [do their job] by [date].

Organise a staff development programme so that [a number of discussion sessions are held] by [date].

To take on responsibility for, and to become effective in [a new area or type of work] by [date].

To improve knowledge of [a foreign language] by [having a number of lessons] by [date].

To improve understanding of [a policy area] by [reading, attending a seminar or course] by [date].

### **Diary Secretary**

#### Purpose of the Job

To help the Minister to make the most effective use of his/her time.

#### Main Duties

Arrange meetings and other appointments.

Maintain the computer-based diary.

Requisition briefing for meetings and ensure that the briefing is well presented.

Obtain tickets and other travel documents, liaise with the Minister's driver and make arrangements for the Minister's box to reach him or her as necessary.

#### Examples of Specific Objectives

?

### **Correspondence Clerk**

#### Purpose of the Job

To ensure that Ministerial submissions and correspondence are dealt with promptly and effectively.

#### Main Duties

Examining incoming mail, requesting advice from appropriate officials and copying as necessary.

Processing submission, case files and outgoing correspondence, including proof-reading final draft of letter for Minister's signature.

Entering details of incoming and outgoing correspondence onto computer database and sending reminders to officials with the aid of



the computer.

[Assisting the Diary Secretary and deputising when Diary Secretary is on leave].

[General administrative support for the office, e.g. photocopying, keeping records of documents up to date, filing].

[Office computer system administrator].

### Specific Objectives

Improve written communication skills by [making a short submission to the PS on one topic each month] [taking a note of one meeting every week].

Develop oral communication skills by preparing and delivering the presentation to the rest of the office on [a work related topic].

To ensure that there are [less than X] correspondence cases over one month old and [no] correspondence cases over two months old.