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Memo for

NPS
ADPC
Chief, Management Staff, CIA

October 1950

Subject: Assessment Staff operations ~~and~~ AND TO

1. During the past few weeks considerable time has been spent by Chief, TRD with the Chief of the Assessment Staff in discussing the present assessment situation, future needs and related problems. Additional discussions have been conducted with Chiefs, Staff II and III/OPC, EXC/OSO and members of the Management Staff, CIA in order to obtain their views of assessment and to ascertain the requirements upon which to base the future development of this staff. The purpose of this paper is to present a clear and concise picture of the Assessment Staff, what it is doing, its organization, its requirements and capabilities, and finally to provide recommendations for its future organization and operations. It is felt that this may be best accomplished by first answering a series of questions which might logically be asked by anyone interested in this program. These are as follows:

A. WHAT IS THE PURPOSE OF ASSESSMENT? - This may be best answered by a statement of the mission of the Assessment Staff as visualized by the chief of that staff.

"The purpose of assessment in CIA is to provide operating officials of OSO and OPC with psychological information so that they can decide: (a) whether the candidate should be employed and if so, in what capacity, and (b) in the case of a person already employed, whether he can be better placed or utilized. Assessment is the analysis of a person's abilities by means of psychometric tests, situation tests, and interviews. In the assessment of an individual, the psychologist analyzes his intelligence, interests, aptitudes, motivations, social skills, temperament, and other factors related to job success."

B. WHAT TYPES OF ASSESSMENT DOES THIS STAFF CONDUCT? - At the present time the Assessment Staff is capable of conducting the following types of assessment:

(1) Intensive - requires two full days and involves putting the candidate through a series of written and oral tests, situation tests, problems and interviews. The tests, situations and problems utilized in analyzing the individual are determined by his proposed assignment and based upon the specific requirements outlined in the assessment request form prepared by the requesting division. Upon the completion of the assessment a detailed report is prepared showing the individual's test results and a compilation of his traits and character as analyzed by the psychologists participating in the assessment.

(2) Covert - this likewise is an intensive type of assessment similar to that outlined above except that it is a covert operation conducted in a safe house installation.

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(3) Screening - this requires one day and involves a series of selected standard tests. In the conduct of these tests if the conducting official notices any psychological deviations in the candidate, he will call upon one of the senior psychologists to interview the individual. Upon the completion of the tests one of the senior psychologists analyzes the scores made by each individual and a brief report is submitted.

C. WHAT OTHER TYPES OF ASSESSMENT COULD BE CONDUCTED? - It is felt that there are two additional types of assessment which the Assessment Staff should be capable of conducting but which do not fall within their present capabilities. These are:

(1) Paramilitary assessment - this is an intensive assessment program for personnel engaged in the paramilitary type of activity, resistance activities, sabotage, etc. It would include intensive assessment and would further involve observation of the individual while running individual and group problems in the field. In general terms, it would provide material upon which to predict an individual's reaction to a given situation while in the conduct of actual field operations. This type of assessment would require a relatively large area and would be of approximately three to four days' duration.

(2) Operational assessment - so called for lack of a better name. Actually it amounts to the assessment of potential agent candidates (and staff personnel if required) in the field or in foreign areas. The assessment would vary according to the candidate, that is, in some cases it might take the form of intensive while in others paramilitary or the screening variety.

D. WHAT PERSONS ARE ASSESSED? - This varies considerably according to the requesting office or division as follows:

(1) OSC - requests assessment for a few selected cases prior to employment or reassignment. *Insert 1.*

(2) OFC - preemployment assessment is required for all personnel grade GS-12 and above. If a person has not been assessed, it must be done prior to promotion or to entry into operations. In addition maladjustment or malassignment cases are likewise assessed.

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(3) TRD - assessment prior to employment for instructors and key staff personnel.

E. WHAT CAN BE SAID OF THE ASSESSMENT STANDARDS? - The Chief of the Assessment Staff has established comparatively high standards for all personnel to be assessed. Only about half of the people assessed come up to the standards established for the Central Intelligence Agency, and specifically OSO and OPC. Thus, there is a rejection ratio of approximately one to one. The Chief of the Assessment Staff is desirous of maintaining high standards and it is believed advantageous to the Agency that this be done. The rejection ratio, however, could ~~and should be~~ reduced by more careful selection and weeding out by the offices and divisions prior to the request for assessment. ~~Doubtful~~ cases should not be referred to the Assessment Staff.

F. COULD ASSESSMENT REPORTS BE SIMPLIFIED BY THE USE OF A FORM? - The use of a form by psychologists in assessing candidates has been discussed in considerable detail with the chief and various members of the Assessment Staff as well as with other psychologists. In all cases their opinion seems to be that the use of such a form does not provide the degree of flexibility necessary in this type of assessment and in some cases it was brought out that the validity of the assessments could not be maintained, nor could all information be provided. A form does have its advantages, principally that it will provide a standard list of items to be checked and secondly the mechanics of such a form would reduce the time of preparation of the report. These factors are being seriously considered by the Chief of the Assessment Staff and he is working on the development of a report which combines the advantages of a form and an adjectival description of the traits and characteristics of the subject candidate.

G. HOW ARE CASES SCHEDULED FOR ASSESSMENT? - Here again it varies according to the office concerned as follows:

(1) OPC - the scheduling of all assessment cases is handled through [redacted] III/PO. The administrative officer or the case officer, as the case may be, of the foreign division completes the assessment request form, and forwards it to [redacted] who maintains a roster and assessment schedule. In coordination with the Assessment Staff he schedules all OPC assessments. Prior to the actual assessment the personnel data of the candidate is furnished the Assessment Staff.

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(2) OSO - all assessment requests of this office are screened through the office of EXO and personnel of his office follow scheduling procedures similar to those noted above for OPC.

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(3) TRD - same as OSO except that all cases are screened by Chief, TRD and requested by the Acting Personnel Officer, TRD.

H. HOW ARE ASSESSMENT REPORTS DISSEMINATED? - Upon the completion of a report by the Assessment Staff, it is sent in a sealed "Eyes Only" envelope to the chief of the requesting division or staff concerned. For OSO cases an additional copy is sent to EXO for information ADSO. If a personnel action on the individual is submitted by the division, the assessment report is attached and furnished ~~SED for file~~. If a personnel action is not requested, then, ^{with 14 days} the assessment report is ~~returned~~ ^{to the Assessment Staff. SED for file}

The assessment report is sent to SED by the division concerned within 14 days.

I. HOW IS THE ASSESSMENT STAFF ADMINISTERED? - The Assessment Staff, as part of the Training Division, is administered by Chief, TRD through the ^{TRD} Administrative Officer. A certain amount of decentralization is necessary due to the physical separation of the ^{Personnel} Staff (Building 14) from Headquarters, TRD (Building T-30). In this respect it is similar to the Covert Training Branch of TRD. Until recently, however, the Assessment Staff has conducted certain administration, principally personnel, without going through established TRD channels. This has caused some confusion because in the long run all such ~~actions~~ ^{matters} must be referred to TRD for approval before action can be taken. This ~~matter~~ ^{particular} has been discussed with the Chief of the Assessment Staff and now all administrative matters are being routed through TRD and handled as any other sub-division of the organization. It is believed that this will ~~greatly~~ relieve the administrative responsibility of the Chief of the Assessment Staff and will allow him more time to devote to assessment. It will be some time before the administrative staff of TRD will be able to provide the support desired by both the Chief of the Assessment Staff and the writer. This is due principally to the shortage of administrative personnel on the TRD T/O. Headquarters, TRD has only one administrative officer, who already has more responsibilities than he is capable of executing. However, when the new T/O for TRD is approved, it is believed that far better support will be attainable. This is expected momentarily. This is desirable not only from the point of view of assessment but from all other branches and staffs of this division. In general, to the greatest extent possible, it is intended to reduce the administrative responsibilities of the Assessment Staff.

J. WHAT OTHER ACTIVITIES CONSUME THE TIME OF THE ASSESSMENT STAFF? - Much of the time of the Chief of the Assessment Staff has been spent in serving on committees and in offering advice for planning projects. A good example of this was the participation in project ZRELOPE which required approximately three days of his

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time. It is felt that the pressing demands for assessment of OSC and OPC personnel require that the Chief of the Assessment Staff devote his entire attention to the accomplishment of this objective. In the future Chief, TRD will act as a buffer between the Assessment Staff and the planning and operational groups to advise them of the responsibilities and capabilities of this staff. It is not intended that Chief, TRD will serve as an adviser or consultant on psychological matters. When such situations arise, the Chief of the Assessment Staff will be called to offer advice and guidance. In general Chief, TRD will obtain requirements for assessment and will provide them to the Assessment Staff.

K. WHAT IS THE PERSONNEL SITUATION OF THE ASSESSMENT STAFF?

(1) The authorized T/O of the Assessment Staff approved 1 August 1950 is shown below in column 1. Column indicates personnel actually on duty and column 3 indicates those positions against which individuals have been recruited.

<u>Position</u>	<u>Grade</u>	<u>On Duty</u>	<u>Recruited</u>
Chief Psychologist	GS-15	William J. Morgan	
Psychologist	GS-14		
Psychologist	GS-13		
Psychologist	GS-13		
Psychologist	GS-12		
Psychologist	GS-11		
Adminis. Asst.	GS-7		
Statistical Analyst	GS-7		
Training Clerk	GS-6		
Secretary	GS-5		

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(2) In addition to the above listed personnel, the Chief of the Assessment Staff has recruited certain psychologists whom he has slotted against positions on the OSC, OPC T/O as follows:

<u>Name</u>	<u>Position</u>	<u>Grade</u>	<u>Slot</u>
	Jr. Psych.	GS-9	EE/OPC
	Jr. Psych.	GS-9	EE/OPC
	Psychologist	GS-13	ADSO Training Pool
	Psychologist	GS-12	ADSO Training Pool
	Jr. Psych.	GS-9	ADSO Training Pool
	Psychometrist	GS-5	Spare Assessment/SEP
	clerk-steno	GS-3	

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With the exceptions of the psychologists slotted against EE/OPC it is anticipated that upon the approval of an increased T/O for the Assessment Staff such personnel would be transferred to this staff. EE/OPC psychologists would remain assigned to that division but would be utilized by the Assessment Staff for training and operations for approximately one year.

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(3) On 1 August 1950 a request was submitted by the Assessment Staff through the Training Division to OSO and OPC for an increase in the T/O of the Assessment Staff. This T/O was approved by the offices noted above and sent to the Executive, CIA. It is presently with the Management Staff where it is being held until a more detailed analysis of the Assessment Staff has been accomplished. It is hoped that this paper will accomplish this requirement and provide justification for expansion.

L. WHAT HAS BEEN THE PRODUCTION OF THE ASSESSMENT STAFF? - For the past year the number of intensive assessment cases for OSO, OPC, TRD and other offices has been as follows:

	<u>OSO</u>	<u>OPC</u>	<u>TRD</u>	<u>OTHER</u>	<u>TOTAL</u>
November, 1949	3	6			9
December, 1949	3	14			17
January, 1950	5	8			13
February, 1950	1	17	2		20
March, 1950	4	15	3		22
April, 1950	0	26	6	15 (SED)	47
May, 1950	1	23	7	2 (SED)	38
June, 1950	4	20	10	1 (Medical)	35
July, 1950	2	27	7	1 (Medical)	
				1 (SSS)	38
August, 1950	3	29	8	1 (SSS)	41
September, 1950	<u>4</u>	<u>32</u>	<u>9</u>	—	<u>45</u>
	30	222	52	21	325

In addition the following screening cases have been conducted for OPC:

August, 1950	96
September, 1950	<u>25</u>
Total	121

M. WHAT ARE THE REQUIREMENTS FOR ASSESSMENT? - The following monthly requirements obtained from OSO, OPC and TRD are stated only in terms of intensive and covert assessment.

	<u>Intensive</u>	<u>Covert</u>	<u>Total</u>
* OSO	12	4	16
OPC	50	10	60
TRD	<u>8</u>	—	<u>8</u>
Totals	70	14	84

* Part 2.

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Until such time as the Assessment Staff is capable of meeting the above requirements the screening type of assessment must be utilized for OPC personnel scheduled in excess of the quota allotted to that office.

N. WHAT ARE THE INDIVIDUAL CAPACITIES OF PSYCHOLOGISTS IN THE CONDUCT OF AN ASSESSMENT CASE?

(1) Senior psychologist - it requires two days to conduct an intensive assessment. A senior psychologist can handle two cases at a time. He should, however, have a day between assessment days for the completion of his report and for the study of future cases. Therefore, a senior psychologist is capable of conducting four intensive assessment cases per week.

A covert assessment case requires two days and is conducted on an individual basis. Therefore, a senior psychologist is capable of conducting only two such cases per week.

(2) Junior psychologist - their productivity is hard to analyze because their presence would increase the production of the senior psychologist, that is, by having a junior psychologist working with a senior psychologist, it would be possible for this team to complete six intensive assessments per week; therefore, for purposes of analysis, it may be said that a junior psychologist could handle approximately two assessment cases per week. *Such personnel would also be utilized for production and analysis of assessments.*

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O. HOW MANY PSYCHOLOGISTS ARE NEEDED TO FULFILL THE ASSESSMENT REQUIREMENTS OF OSO, OPC and TRD? - The assessment requirements of OSO, OPC and TRD and the production rate of psychologists have been considered above. Comparing these mathematically it would require approximately five senior psychologist for intensive assessments and two senior psychologists for covert assessments. This assumes that all psychologists are working five days a week, 52 weeks a year. However, it must be recognized that such things as annual leave, sickness, training and unusual incidents would reduce this figure. Therefore, it is believed that one additional senior psychologist should be added. The Chief of the Assessment Staff is not considered in the production as it is not believed he should be given responsibility for the assessment of individual cases but should have ~~4~~ ¹ directory, and supervisory responsibilities over the activities of the entire assessment staff. He may, however, participate in specialized assessments. Thus, a Chief of Assessment Staff with eight senior psychologists or a comparable combination of senior and junior psychologists appears to be a sound basis upon which to plan a T/O for this staff to ~~meet~~ ^{fulfill} local requirements.

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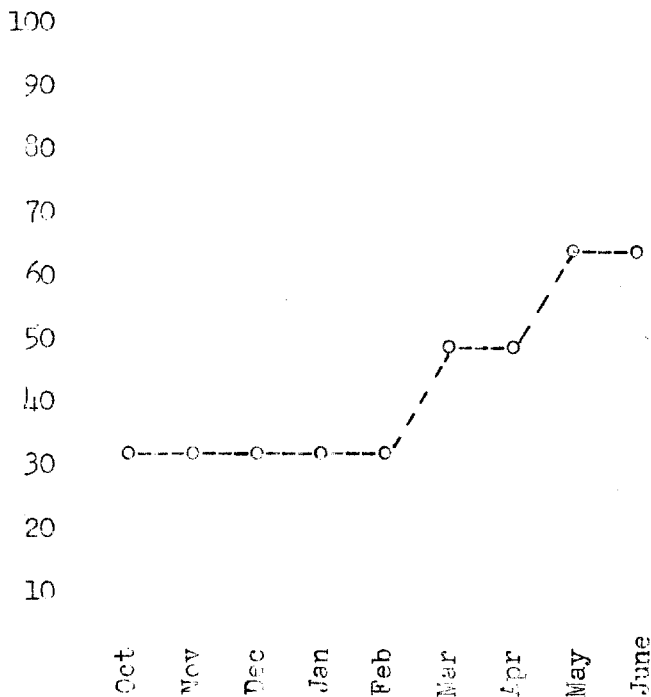
P. WHAT ARE THE NEEDS FOR OPERATIONAL ASSESSMENT? - With the expansion of OSO and OPC operations overseas, the need for assessment in these areas is becoming quite apparent. Informal queries

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have been received from divisions of both OSO and OPC as to the capabilities of the Assessment Staff to provide such assessments. Up to the present, the answer has necessarily been in the negative. At a recent meeting with Chiefs, Staff II and III/OPC, the desirability of having a psychologist on each of the staffs of the foreign divisions of OPC was considered. In general, it was thought advisable but impractical at the present time. Therefore, as an expedient to fulfill overseas requirements of both OSO and OPC and at the same time to develop procedures and standards for future activities, it seems advisable that a group be organized within the Assessment Staff which can be dispatched to overseas installations as required. In interim periods this group could be used locally for paramilitary assessments and development of techniques.

Q. WHEN CAN THE ASSESSMENT STAFF INCREASE ITS PRODUCTION? - This is dependent entirely upon the availability of psychologists. After a psychologist enters on duty there must logically be a period of orientation and training prior to his utilization as a psychologist on the Assessment Staff. It is believed that approximately three months will be required as follows: three to four ~~months~~ ^{weeks} orientation in the Assessment Staff, five weeks, Operations Course/TRD, four weeks, auditing selected lectures of the Advanced Operations Course/TRD and final on-the-job training in the Assessment Staff. Assuming that (1) all psychologists recruited to date are security cleared on a normal schedule, (2) that the psychologists charged to EE/OPC are available to the Assessment Staff, (3) that approximately three months will be used for orientation and training, and based upon the capacity of psychologists noted above, the following chart indicates the number of intensive assessment cases which can be handled.



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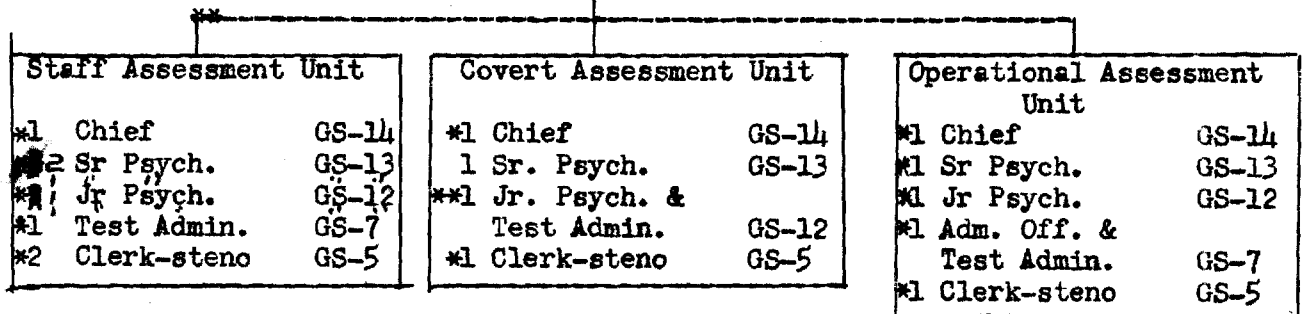
2. Comments and Recommendations

a. Assessment Standards - It is recommended that the high standards established by the Chief of the Assessment Staff be maintained in any future organization and operation of this Staff. In order to reduce the ~~rejection ratio~~ ^{number of requests} ~~increase~~ by the Assessment Staff, it is strongly recommended that everything possible be done to screen the cases before the request for assessment. Since OPC at the present time has the major requirement for the Assessment Staff, it is believed advisable that the screening of potential candidates for employment be accomplished by the OPC Screening Board prior to submission of the request for assessment. It is further recommended that all cases of OSO and TRD be carefully screened to eliminate cases where assessment is not required. In addition, it is recommended that the division and staff chiefs of both OSO and OPC be ~~cautioned~~ ^{advised} against requesting assessment as a means of creating a reason for not employing an individual or for his discharge. They must take on their full command responsibilities and if, in their opinion, the individual is not qualified, the personnel action should immediately be cancelled.

Table of Organization

b. To accomplish the estimated assessment requirements for OSO, OPC and TRD, it is recommended that the following T/O be approved. It is believed that sufficient justification for such increases is provided in the body of this paper.

Assessment Staff		
1.	Chief	GS-15
2.	Deputy	GS-14
** 1.	Adm. Off.	GS-9
* 1.	Psychometrist	GS-9
1.	Secretary	GS-6
1.	Clerk-steno	GS-5
* 1.	File Clerk	GS-3



	Present	Proposed
GS-15	1	1
GS-14	1	4
GS-13	2	5
GS-12	1	4
GS-9	0	1
GS-7	2	3
GS-6	1	1
GS-5	1	1

GS-3	0	1
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⑨ * New Positions
** Change in grade or title

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c. Assignment of Assessment Quotas - The Assessment Staff was organized for the mutual service of both OSO and OPC, and therefore, it is recommended that assessment ~~cases~~ be assigned to these offices on a fifty-fifty basis. However, since OPC obviously has the greater requirement, it is recommended that the TRD requirement be considered as part of the overall OSO requirement. If this recommendation is approved, the Chief of the Assessment Staff could keep [] II/PO/OPC and the assessment scheduling officer of OSO advised as to the number of available assessment cases assigned to that office for a given period. If possible, assessment should be scheduled two weeks in advance so that in the event OSO does not have sufficient assessment candidates to fill its quota, it can so notify OPC so that they may have the opportunity to provide such candidates.

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d. Types of Assessment - In order that assessment be conducted with the maximum degree of validity, it would be advisable even at the present time, to conduct only the intensive type of assessment. However, since OPC has a pressing demand for assessment and since the Assessment Staff is not capable of fulfilling these requirements in the immediate future, it is believed advisable that the screening type of assessment be conducted until such time as the Assessment Staff is built up sufficiently to provide intensive assessment for all candidates. Thus, in addition to the quotas for intensive and covert assessments as noted above to fulfill its immediate requirements OPC should schedule the screening type of assessment on days indicated by the Chief of the Assessment Staff.

The requirement for the operational type of assessment is readily apparent and requires no further explanation. As for paramilitary assessment, the requirements for this type are not well enough established at the present time to justify inclusion of additional psychologists on the T/O. It is believed advisable, however, that during lull periods, the Assessment Staff should research this type of assessment and prepare a recommendation as to its development, organization and operations.

e. Assessment Files - It is recommended that the Assessment Staff be provided a vault in which to maintain its assessment files. It would be preferable if this vault were constructed in Building 14. If this is not practical, it should be established in the nearby vicinity where it will be immediately available to this Staff.

f. Additional Psychologists - The T/O considered in paragraph 2b. above was developed only on the basis of what ~~is~~ believed to be existing assessment requirements for OSO and OPC. It is believed,

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however, that as the^c offices expand and as the Assessment Staff is able to fulfill these requirements that there will be an even greater demand for this type of service. With this in mind it is recommended that a total of ten slots on the OSO and OPC T/O's (preferably ADSO Trainee Pool and similar T/O slots in OPC) be made available to the Chief of the Assessment Staff through the TRD administrative officer. These slots would be filled by the recruitment of psychologists to be utilized at a future date as members of an expanded Assessment Staff or to fill vacancies in the Assessment Staff as present personnel are rotated to operational assignments.

[Redacted]

Chief, TRD

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