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EXECUTIVE OFFICE OF THE PRESIDENT  
BUREAU OF THE BUDGET  
WASHINGTON 25, D. C.

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BULLETIN NO. 62-7

January 15, 1962

TO THE HEADS OF EXECUTIVE DEPARTMENTS AND ESTABLISHMENTS

SUBJECT: Department and agency appraisals of field organization and management

1. Purpose. This Bulletin transmits guidelines for agency appraisal of field organization and management as directed by the President's memorandum of November 13, 1961, to the heads of departments and agencies, calling for greater coordination and efficiency of Government field activities.

2. Nature of the appraisals. While appraisal of field operations is inherently a continuing responsibility, the President's memorandum directed each department and agency to make a special critical appraisal aimed at improved economy, efficiency, and substantive effectiveness of the executive branch. The appraisals should be designed and conducted so as to be of maximum assistance to you in improving your field operations. No formal reports are expected by the President or the Bureau of the Budget.

3. Bureau of the Budget participation. In line with the Bureau's interest and concern for improving management in the executive branch, you are requested to:

a. Provide the Bureau of the Budget with a copy of your study plans as they are developed, including target dates and projected methods of study. This will make it possible for the Bureau to serve as a clearing house of information on approaches that are being employed in the several departments and agencies.

b. Apprise Bureau staff of significant conclusions or recommendations that may have application beyond your agency. The Bureau will continue to work toward developing general guidance on field organization and management.

Questions or requests for assistance in planning the appraisals should be made to Mr. Harold Seidman, Acting Chief, Office of Management and Organization (Code 113, extension 413).

DAVID E. BELL  
Director

Attachment

*Jan 20, 1962 - discussed w/ Frank  
Casper. He stated that if any action was required,  
they would get in touch with us. I expressed the  
opinion that it would be very difficult to carry  
out the above. Casper agreed.*

BULLETIN NO. 62-7  
Attachment A

AGENCY APPRAISAL OF FIELD ORGANIZATION AND MANAGEMENT

1. General

The President's memorandum of November 13, 1961, to the Heads of the Departments and Agencies, called for greater coordination and efficiency of government field activities. To this end, it called specifically for:

- a. Improved management and direction of Federal offices in the field by officials in Washington.
- b. Establishment of inter-agency working groups in important field centers for closer coordination across department and agency lines.
- c. A critical appraisal by departments and agencies, with field officials, of their field management procedures.
- d. Over all, new emphasis on management skills in support of improved economy, efficiency, and substantive effectiveness of the executive branch.

2. What the executive agencies are required to do

The President's memorandum asks each department and agency to devote specific effort toward improving the organization and management of its field activities toward the end that improved economy, efficiency, and substantive effectiveness will result. While this is inherently a continuing responsibility, each agency is asked to take two specific actions:

- a. Arrange for the personal participation of responsible field officials in the work of field Boards of Federal Executives which will be established by the Civil Service Commission.
- b. Make a critical appraisal of field organization and management. This is intended to be an organized review, with field participation, looking toward actions to improve organization and management procedures of field activities, including functions performed by both headquarters and field levels. The Bureau of the Budget is responsible for providing guidance to departments and agencies in making this appraisal.

### 3. Department and agency field appraisals

All departments and agencies, unless they have done so within the past year, are expected to review headquarters-field relationships, field organization structure, and operating methods relative to field activities. The study will require critical appraisal of the premises underlying existing organization and procedures as well as an evaluation of results obtained.

- a. The areas of coverage for the studies will include the means of appraising program effectiveness and performance as well as administrative matters. The President has directed that "New emphasis shall be placed on management skills in support of improved economy, efficiency, and the substantive effectiveness of the Executive Branch of the Government."
- b. The special appraisals are to be made by each department and agency for the primary purpose of improving its own operations. Agencies will not be required to provide formal reports of the studies to the President or to the Bureau of the Budget.

### 4. Subject matter to be covered

Provided here is an illustrative outline of subjects appropriate to be included in the special studies of field organization and management. The items will not apply equally to all departments and agencies; moreover, there will probably be other subjects that an agency may wish to include to meet its own problems.

#### a. Headquarters-field relationships

##### (1) Headquarters organization for field administration

- Nature of the headquarters organization
- Supervisory and communications arrangements between headquarters and field - functional or line supervision
- Machinery for planning the work and resources of field elements.

##### (2) Functions and responsibilities of field elements

- Missions and functions assigned
- Delegations of authority and responsibility
- Extent of decentralization

(3) Evaluation of performance

- Standards of performance imposed on the field organization
- The measurement of field performance
- Means for improving performance

b. Field organizational structure

(1) Geographic dispersion

- Number, kind, and location of field elements
- Possibility of reducing unneeded field offices
- Realignment of areas and field office locations to aid cooperation with other agencies

(2) Program dispersion

- Multi-functional
- Bureau
- Activity

(3) Intermediate echelons of responsibility - regional directors, area representatives, etc.

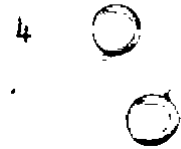
(4) Fundamental basis of field organizations - purpose, function, process, geography, or clientele.

(5) Field coordination

- Within the department or agency
- With other departments and agencies
- With State and local governments

(6) Management services such as personnel, space, supply, budget, finance, communication, transportation, public relations, and management studies

- Located with the program activities
- In central field organizations
- In the headquarters



c. Field operations

- (1) Methods and procedures
  - Prescribed by manuals
  - Left to field discretion
- (2) Means for relating staffing and other resources to workload
- (3) Assigning, scheduling, and controlling work
  - Use of manpower skills
  - Use of mechanical and electronic means
  - Flow of work and office layout
- (4) Means for increasing effectiveness and reducing costs
- (5) Backlogs
- (6) Complaints

5. Organizing to make the field appraisals

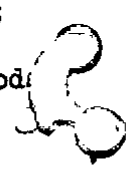
a. Study group

The appraisal to be made by each department and agency can be assigned to an established management study group, for example, a management analysis staff or a field review and appraisal staff; or it can be made by an ad hoc committee or task force. In either event, there must be field participation through membership on the study group or active solicitation of field views and recommendations through visitation and correspondence. The study group may include one or more participants from outside of the agency, or the personnel may be drawn entirely from within.

b. Development of the study plan

Before the study is begun, a comprehensive plan should be developed covering:

- (1) Makeup of the study group
- (2) How the field will participate
- (3) Study methods - interviews; hearings; analysis of materials; questionnaires; study of work flow, traffic, responsibility distribution, and administrative procedures; and other methods



- (4) Schedule by phases including the final target date
- (5) Nature of the final report

c. Possible methods to be employed

An important phase of the study will be the examination to be done in the headquarters before any visits are made to field locations. Due to the variety of field situations no detailed methods are prescribed; however, certain steps appear basic to any study of this type:

- (1) Review present legal authorities, mission statements, delegations of authority, procedural instructions, and organizational arrangements.
- (2) Review previous field organization and management studies, Congressional committee hearings and studies, Hoover Commission reports, and other background material.
- (3) Compare with other governmental field organizations, particularly where problems are similar.
- (4) Study and compare functions and workload relative to staffing in comparable field activities and geographic areas.
- (5) Study correspondence and other communications between headquarters and field elements and between field elements themselves to learn the nature of problems and how they have been met in the past.
- (6) Determine what is actually performed in the field elements being studied and how well it is being done. This may be done on a sampling basis both of installations to be covered and functions and work within an installation. Examination on a sampling basis will permit more detailed study with limited resources. In addition to the standard techniques of interviews, observation, review of written instructions and questionnaires, selective use may be made, as appropriate, of statistical analytical techniques and possibly of some of the newer mathematical techniques.

6. Bureau of the Budget assistance

The Bureau will be prepared, within its available resources, to assist the departments and agencies on their internal appraisals of field management, as needed. This assistance may include:

- a. General guidance on coverage and methods of field management studies.
- b. Advice on the design of these studies.

- c. Clearing house services with regard to the variety of approaches being employed by agencies in conducting appraisals and initiating improved practices.

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18 JAN 1952

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*Budget*

EXECUTIVE OFFICE OF THE PRESIDENT  
BUREAU OF THE BUDGET  
WASHINGTON 25, D. C.

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BULLETIN NO. 62-2

September 19, 1961

TO THE HEADS OF EXECUTIVE DEPARTMENTS AND ESTABLISHMENTS

SUBJECT: Increased travel costs pursuant to Public Law 87-139

*etc*  
*Jan*  
*Wm*  
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1. Purpose. This bulletin provides policy guidelines and instructions for financing increased travel costs attributed to revised allowances authorized by Public Law 87-139.

2. Policy. Agencies will make a continuous and progressive effort to absorb as much as possible of the increased costs within travel limitations, appropriations and funds available in fiscal year 1962 and without increases in funds requested for fiscal year 1963. It should be recognized that rates authorized in Public Law 87-139 are maximum rates to be allowed by the departments and agencies only when circumstances clearly warrant, as set forth in Bureau of the Budget Circular No. A-7, Transmittal Memorandum No. 21, August 14, 1961.

Agency attention is also called to the view expressed in Senate Report No. 544 that most, if not the entire cost of this measure can be absorbed if all official travel is handled in a judicious manner. The Senate Committee did not suggest the curtailment of necessary travel, but suggested that better scheduling of work, elimination of duplication of effort, acceptance of coach accommodations on trains and planes when suitable to the occasion, and other measures taken as a matter of course by a prudent private traveler will result in the economies necessary to absorb costs. The use of "less than first class," "tourist," or "economy" accommodations are further examples of economies that will reduce transportation costs and allow absorption of increased allowances within funds available (see Bureau of the Budget Circular No. A-7, Transmittal Memorandum No. 15, May 16, 1960).

3. Apportionment requests. The increase in travel allowances authorized by Public Law 87-139 will not be considered, in itself, a justification for requesting apportionments which indicate the need for supplemental appropriations. Expenditures for travel are considered as being within administrative control.

4. Submission of supplemental estimates and similar proposals.

a. In any instance where it is determined that the absorption of travel costs within funds available in the fiscal year 1962 will reduce travel to a level which cannot be sustained for the full year without serious damage to the program involved, a request for a supplemental



to allow the minimum level of travel necessary from the time that additional funds could probably be made available (April 1) may be prepared for consideration in accordance with instructions contained in Bureau of the Budget Circular No. A-41.

b. Instructions contained in Circular No. A-41 will also govern those instances where changes are required in specific or general travel expense limitations. In this regard, it should be noted that increases in travel limitations may be needed even though no increase in funds is required.

5. Agency budget submissions for fiscal year 1963. Tentative forecast of supplemental estimates of additional funds required in fiscal year 1962, as a result of increased travel allowances, will be set forth in the 1963 budget submission in separate schedules of program and financing and will be explained in the justification (see section 4 of Bureau of the Budget Circular No. A-11).

DAVID E. BELL  
Director

21 SEP 1964

*Ed*

EXECUTIVE OFFICE OF THE PRESIDENT  
BUREAU OF THE BUDGET  
WASHINGTON 25, D. C.

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BULLETIN NO. 62-1

July 15, 1961

TO THE HEADS OF EXECUTIVE DEPARTMENTS AND ESTABLISHMENTS

SUBJECT: Cooperation with the Post Office Department's new "Nationwide Improved Mail Service" program

On July 19, 1961, the Post Office Department will formally initiate its Nationwide Improved Mail Service ("NIMS") program. The Department expects to establish continuing advisory groups composed of the larger commercial mail users in each of the 289 cities named on the attached list. These groups will work with local postmasters in developing cooperative mailing practices designed to be mutually beneficial in improving the mail service and reducing postal costs.

The initial objective of this program will be to reduce the burden of the heavy receipts of mail at the close of the normal business day. The Department's studies of this problem indicate that much really important correspondence now suffers delay to many destinations since early transportation departures cannot be met for all mail being processed. At the same time, much of this volume consists of items for which time preference is of relatively little significance. Commercial mailers, therefore, will be asked to schedule their non-priority mail deposits for the morning hours when they can be handled without interfering with the dispatch of mail with news or time value.

The present concentration of a high proportion of the postal workload into a relatively few hours of the working day also results in inefficient use of buildings, equipment, and manpower and unduly increases the costs of the postal service.

Federal agencies have as much to gain from more efficient handling of their mail as do the commercial mailing firms which are being requested to cooperate. In Washington, D. C., and other locations where Government mail volume is substantial, your cooperation will be necessary in order to assure that the benefits are, in fact, realized.

To secure improved handling of correspondence originating in your agency, you should designate a representative in Washington, D. C., and any other listed city in which you have substantial mailing activity to call on the local postmaster and work with him (1) in the establishment of more efficient and economical mail collection schedules, (2) in the solution of other postal service problems concerning Government mail, and (3) in carrying out any further cooperative efforts which may be undertaken through the Nationwide Improved Mail Service program.

DAVID E. BELL  
Director

Attachment

Attachment A  
Bulletin No. 62-1LIST OF POST OFFICES AT WHICH NATIONWIDE IMPROVED MAIL  
SERVICE (NIMS) ADVISORY GROUPS WILL BE ESTABLISHEDAlabamaBirmingham  
Mobile  
MontgomeryAlaska

Anchorage

ArizonaPhoenix  
TucsonArkansas

Little Rock

CaliforniaAnaheim  
Bakersfield  
Berkeley  
Beverly Hills  
Burbank  
Culver City  
Fresno  
Glendale  
Inglewood  
Long Beach  
Los Angeles  
McClellan AFB  
North Hollywood  
Oakland  
Palo Alto  
Pasadena  
Richmond  
Riverside  
Sacramento  
San Bernardino  
San Diego  
San Francisco  
San Jose  
San Mateo  
Santa Ana  
Santa Barbara  
Santa Monica  
Stockton  
Van Nuys  
WhittierColoradoBoulder  
Colorado Springs  
DenverConnecticutBridgeport  
Bristol  
Greenwich  
Hartford  
New Britain  
New Haven  
Stamford  
WaterburyDelaware

Wilmington

District of Columbia

Washington

FloridaFort Lauderdale  
Jacksonville  
Miami  
Orlando  
Pensacola  
Saint Petersburg  
Tallahassee  
Tampa  
West Palm BeachGeorgiaAtlanta  
Augusta  
Columbus  
Macon  
SavannahHawaii

Honolulu

Idaho

Boise

IllinoisAurora  
Bloomington  
Chicago  
Decatur  
Elgin  
Evanston  
Joliet  
Melrose Park  
Moline  
Mount Morris  
North Chicago  
Oak ParkIllinois (Cont'd.)Peoria  
Rockford  
Skokie  
Springfield  
WaukeganIndianaCrawfordsville  
Elkhart  
Evansville  
Fort Wayne  
Gary  
Hammond  
Indianapolis  
Kokomo  
Lafayette  
South Bend  
Terre HauteIowaCedar Rapids  
Davenport  
Des Moines  
Nevada  
Sioux City  
WaterlooKansasKansas City  
Topeka  
WichitaKentuckyLexington  
LouisvilleLouisianaBaton Rouge  
New Orleans  
ShreveportMaine

Portland

MarylandBaltimore  
Silver SpringMassachusettsBoston  
Brockton  
Clinton  
Fall River

Massachusetts (Cont'd.)

Lawrence  
Lowell  
Lynn  
New Bedford  
Springfield  
Worcester

Michigan

Ann Arbor  
Battle Creek  
Dearborn  
Detroit  
Flint  
Grand Rapids  
Jackson  
Kalamazoo  
Lansing  
Muskegon  
Pontiac  
Royal Oak  
Saginaw

Minnesota

Duluth  
Minneapolis  
Saint Paul

Mississippi

Jackson

Missouri

Jefferson City  
Kansas City  
Saint Joseph  
Saint Louis  
Springfield

Montana

Billings

Nebraska

Boys Town  
Lincoln  
Omaha

Nevada

Las Vegas  
Reno

New Hampshire

Concord  
Manchester

New Jersey

Atlantic City  
Camden  
Clifton  
East Orange  
Elizabeth  
Englewood  
Fairview  
Hackensack

New Jersey (Cont'd.)

Jersey City  
Kearny  
Newark  
New Brunswick  
Passaic  
Paterson  
Plainfield  
Princeton  
Rahway  
Rutherford  
Trenton  
Union  
Union City

New Mexico

Albuquerque

New York

Albany  
Binghamton  
Brooklyn  
Buffalo  
Elmira  
Flushing  
Freeport  
Garden City  
Great Neck  
Hempstead  
Hicksville  
Jamaica  
Long Island City  
Mount Vernon  
Newark  
New Hyde Park  
New Rochelle  
New York  
Niagara Falls  
Pleasantville  
Port Washington  
Poughkeepsie  
Rochester  
Schenectady  
Staten Island  
Syracuse  
Utica  
White Plains  
Yonkers

North Carolina

Charlotte  
Durham  
Greensboro  
High Point  
Raleigh  
Winston-Salem

North Dakota

Fargo

Ohio

Akron  
Canton  
Cincinnati  
Cleveland  
Columbus  
Dayton  
Lima  
Mansfield  
Marion  
Springfield  
Toledo  
Youngstown

Oklahoma

Oklahoma City  
Tulsa

Oregon

Eugene  
Portland  
Salem

Pennsylvania

Allentown  
Bethlehem  
Chester  
Easton  
Erie  
Hanover  
Harrisburg  
Lancaster  
Philadelphia  
Pittsburgh  
Reading  
Scranton  
Sharon Hill  
Upper Darby  
Warren  
Wilkes-Barre  
Williamsport  
York

Puerto Rico

San Juan

Rhode Island

Pawtucket  
Providence

South Carolina

Charleston  
Columbia  
Greenville

South Dakota

Sioux Falls

Tennessee

Chattanooga

Tennessee (Cont'd.)

Kingsport  
Knoxville  
Memphis  
Nashville

Texas

Abilene  
Amarillo  
Austin  
Beaumont  
Corpus Christi  
Dallas  
El Paso  
Fort Worth  
Houston  
Lubbock  
San Antonio  
Waco  
Wichita Falls

Utah

Ogden  
Salt Lake City

Virginia

Alexandria  
Arlington  
Lynchburg  
Norfolk  
Richmond  
Roanoke

Washington

Seattle  
Spokane  
Tacoma

West Virginia

Charleston  
Huntington

Wisconsin

Appleton  
Chippewa Falls  
Green Bay  
Madison  
Milwaukee  
Oshkosh  
Racine