

effective

DECEMBER 1-2, 1970



REPORTING

*A
National
Symposium*

sponsored by
General Services Administration
National Archives and Record Service

systems

DIGEST OF PROGRAM

SESSION ONE: TUESDAY MORNING

Introductions

Dr. James B. Rhoads
Archivist of the United States
Hon. Robert L. Kunzig
Administrator of General Services
Hon. Larry A. Jobe
Assistant Secretary for Administration
Department of Commerce

*Effective Management Via Effective Reporting
Systems: Keynote Address
(To Be Announced)*

Managerial Requirements in a Reporting System
Mr. John T. Garrity
McKinsey & Company, Inc.

SESSION TWO: TUESDAY AFTERNOON

Reporting Against Management Objectives

Mr. Thomas S. Johnson
Chemical Bank of New York

Case Study—

(To Be Announced)
Department of Housing and Urban
Development

Systems Approach in Reports Management

Mr. Max Garchik
Federal Aviation Administration

Reporting Techniques and Reports Presentation

Mr. Everett O. Alldredge
National Archives and Records Service

SESSION THREE: WEDNESDAY MORNING

*Reporting Systems Management in Data Systems
Development*

Commander Jan S. Prokop
Department of Defense

Case Study—Extension Service Story

Dr. Edgar A. Reeves, Jr.
Department of Agriculture

*Assigning Priorities to Management Information
Systems*

Mr. Alan L. Weiser
Vitro Laboratories

Case Study—FAR Project

Edwin Deckard
Office of Management and Budget

SESSION FOUR: WEDNESDAY AFTERNOON

Value Analysis in Reporting Systems

Mr. A. J. Dell'Isola
Louis C. Kingscott & Associates

Case Study—The Bureau of Customs Story

Mr. Edward M. Ellis
Department of the Treasury

Case Study—Savings in Public Reporting

Mr. Anthony J. Ossi
Maritime Administration

Evaluation of Reporting Systems

Robert S. Cochran
Department of the Army

DATE: December 1-2, 1970

TIME: 9:00 to 4:30 both days

PLACE: Department of Commerce Auditorium
14th Street, between Pennsylvania and
Constitution Avenues.

REGISTRATION:

Registration is limited to 500 persons.
Registration confirmation and identification
card will be mailed to you prior to the
symposium.

THERE IS NO CHARGE

Applications must be received by
November 20, 1970

For further information, write or telephone:

M. Osmond Newgard, Symposium Coordinator
National Archives and Records Service
General Services Administration
Washington, D.C. 20408
Telephone: Code 13, ext. 34425 or 963-4425

REGISTRATION APPLICATION
Please use a separate form for each applicant

AGENCY	MAIL STOP NUMBER
AGENCY MAILING ADDRESS	TELEPHONE Code Extension
APPLICANT'S NAME	TITLE AND GRADE

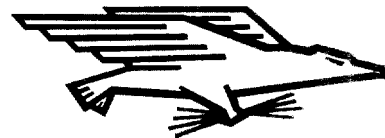
ADVISORY COMMITTEE

George W. Bergquist	Department of Defense
William R. Berry	Department of Health, Education and Welfare
Dwight A. Ink	Office of Management and Budget
Hon. Larry A. Jobe	Department of Commerce
Ward Elliott	Department of Housing and Urban Development



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WASHINGTON, D.C. 20408

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PREPARATION OF THE AGENCY STATEMENT
OF EXPECTED SAVINGS, DUE SEPTEMBER 30, 1970,
AS REQUIRED BY THE GOVERNMENT-WIDE STUDY TO IMPROVE
FEDERAL REPORTING AND REDUCE RELATED PAPERWORK

1. Agencies participating in the study will use the format set forth as Exhibit I of BOB Circular No. A-44, Revised.

September 30, 1970 SUBMITTAL ON GOVERNMENT-WIDE STUDY TO IMPROVE FEDERAL REPORTING AND REDUCE RELATED PAPERWORK		
Submitted By: <u>Department of Government</u>	Date: <u>9-25-70</u>	

REPORTING CATEGORY	BASE PERIOD (AS OF 1-1-70)	SAVINGS GOALS
Public Reporting:		
Number of Reports	<u>300</u>	<u>15</u>
Cost of Reporting	<u>1,700,000</u> (manhours)	<u>85,000</u> (manhours)
Interagency Reporting:		
Number of Reports	<u>25</u>	<u>3</u>
Cost of Reporting	<u>\$70,000</u>	<u>\$3,500</u>
Internal Reporting:		
Number of Reports	<u>1500</u>	<u>80</u>
Cost of Reporting	<u>\$65,000,000</u>	<u>\$3,250,000</u>

2. Savings goals will reflect anticipated cost reductions in man-hours or dollars, as outlined in BOB Circular No. A-44 Revised, Paragraph 4b.

3. Performance and savings goals in public reporting requirements will be expressed as man-hours expended by the public in completing administrative forms and inquiries covered by the Federal Reports Act. All such forms and inquiries not classified "statistical", in the OMB semi-annual listing of approved reports, will be considered "administrative."

To determine public man-hour reporting requirements agencies may:

- (a) Refer to existing documentation such as attachments to Standard Form No. 83, "Request for and Notice of BOB Clearance Action."
 - (b) Survey or sample man-hour costs by report and type of respondents.
 - (c) Assign man-hour estimates for the completion of elemental parts of each report, times the number of respondents, times the annual submission frequency.
 - (d) Combine any or all of the above methods or utilize other sources of information.
4. Performance and savings goals in interagency reporting will be expressed as dollar evaluations of the cost of reporting required of one agency by another. Anticipated savings in interagency reporting will be determined by requiring agencies but will reflect reporting costs sustained by responding agencies only.

To determine dollar evaluations of interagency reporting costs agencies may:

- (a) Refer to existing documentation which may be available within the requiring and/or the responding agency.
- (b) Use a report costing formula or method taking into account gathering and preparation man-hours, man-hour costs at the various levels concerned, machine costs, printing costs and any other significant costs.

5. Performance and savings goals in internal reporting will be expressed as dollar evaluations of the cost of "significant" internal reports and reporting systems, as defined in Attachment A to Transmittal Memorandum No. 1, BOB Circular No. A-44 Revised.

Agencies which do not have a comprehensive reports control program must precede any efforts at costing with an identification and measurement of the scope of their existing internal reporting systems.

In determining costs of internal reporting systems, man-hour costs associated with information gathering and reports preparation and utilization, in addition to machine time, printing costs, distribution costs and any other significant costs must be taken into consideration.

6. Projected man-hour and dollar savings goals identified by agencies in the attachment to the annual management improvement report due September 30, 1970, are subject to the savings goals requirements set forth in BOB Circular A-44 Revised.

Actual savings achieved, to be reported by agencies in the attachment to the annual management improvement report due September 30, 1971, are subject to the savings validation requirements also set forth in BOB Circular A-44 Revised.

Most agency total dollar savings goals will approximate or exceed the following:

$$\frac{\text{Agency budget}}{\text{Federal budget}} \times \$200,000,000$$

Nature of mission particularly in the case of some of the smaller agencies, may require some departure from the above formula. In any event, man-hour and savings goals and savings accomplishments will be reviewed by OMB budget examiners for consistency with overall goals.

Both the projected dollar savings goals and the dollar savings actually achieved may become factors in subsequent Agency budget preparation and approval.

To assist agencies in meeting their goals for September 30, 1971, General Services Administration offers the following assistance:

. . . A handbook entitled Reports Management will be available in September 1970. The contents of this handbook will include the role of reports management, relation of management reports to the information universe, designing management reporting systems, developing reports directives and forms, cost of reporting, the reports control program and regulations on reports. This is one of a series of handbooks available on paperwork subjects.

. . . A two hour seminar for program managers will be available in October 1970. Entitled "Improving Federal Reports", this seminar includes orientation on the Government-wide Study to Improve Federal Reporting and Reduce Related Paperwork and the methodology of how to conduct the study.

. . . Workshops are available on a variety of paperwork subjects. Those which may be useful in carrying out this study include:

Modernizing Management Reports

Information Systems Design

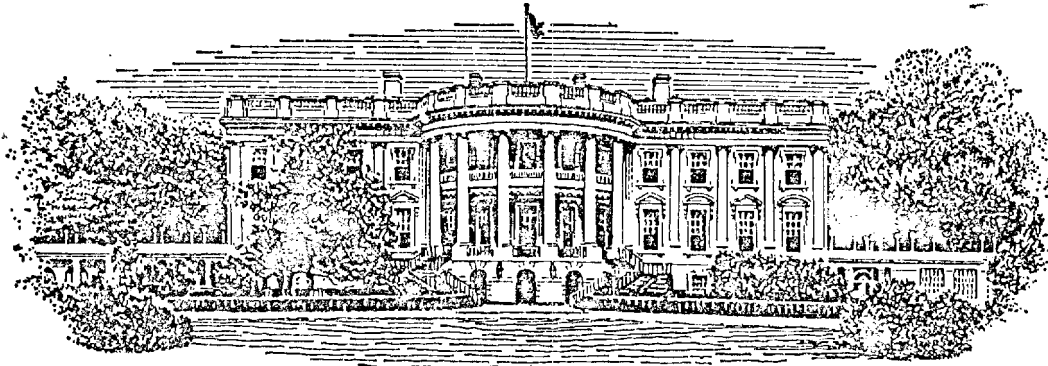
Mechanizing Paperwork Systems

Source Data Automation

Forms Analysis and Design

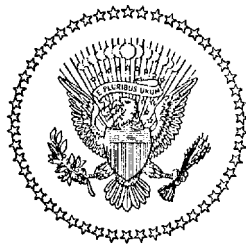
Office Information Retrieval

. . . Consultation. Analysts from National Archives and Records Service, GSA are available to advise agencies on how to meet both the September 30, 1970 and the September 30, 1971 requirements of the study. Services of these analysts can be obtained by telephoning 395 (IDS 103) - 5710.



Weekly Compilation of
**PRESIDENTIAL
DOCUMENTS**

Monday, August 10, 1970



Volume 6 • Number 32
Pages 1013-1039

*Copy to Record Mgt Board
& Paul in OPRB*

Buzhardt, 46, most recently has been Special Assistant to the Chairman of the Blue Ribbon Defense Panel from June 30, 1969, to June 30, 1970. Previously he served as Special Assistant to the Assistant Secretary of Defense for Administration.

A native of South Carolina, Buzhardt received his B.S. degree in military engineering from the United States Military Academy, West Point, in 1946. He earned his LL.B. from the University of South Carolina in 1952.

Buzhardt practiced law in McCormick, South Carolina, from 1952-58. From 1958-66 he served on the staff of Senator Strom Thurmond. He resumed his private law practice in 1966 and maintained his general practice until he joined the Defense Department early last year.

Buzhardt is married to the former Imogene Sanders. The Buzhardts have four children and reside in Fairfax, Va.

Federal Reporting and Paperwork

The President's Memorandum to Heads of Departments and Agencies. August 5, 1970

MEMORANDUM FOR THE HEADS OF DEPARTMENTS AND AGENCIES

Subject: Improving Federal Reporting and Reducing Related Paperwork

Since my inauguration, I have repeatedly stressed the need to streamline the management activities of the executive branch. As an important part of this effort, I am requesting all agencies and departments to participate in a Government-wide project to analyze paperwork requirements and discard those reports that fail to meet rigorous standards of need. In addition, we must examine our information control system and develop efficient alternatives to traditional reporting methods.

I have therefore established two goals for fiscal year 1971:

- (1) A reduction of five million man-hours in the time expended by the public in filling out administrative forms and inquiries under the Federal Reports Act.
- (2) A reduction of 200 million dollars in executive branch funds expended for reporting and related paperwork.

The Office of Management and Budget has issued instructions to you implementing this project. Mr. Kunzig, Administrator, General Services Administration, will assume the lead in coordinating this project.

I expect all of you to give this effort your full support and to report your accomplishments at the end of fiscal year 1971.

RICHARD NIXON

North Carolina State Advisory Committee on Public Education

Announcement of Formation and Membership. August 5, 1970

The Cabinet Committee on Education today announced the formation of the North Carolina State Advisory Committee on Public Education. The 28-member group of educators and community leaders will work to help North Carolina schools complete the transition from a dual to a unitary system while maintaining quality education. Working in cooperation with the Cabinet Committee and its staff, they will seek to provide the local leadership which is essential if compliance with the law on school desegregation is to occur peacefully and without disruption of the educational process.

The North Carolina Committee is the third State Committee organized by the Cabinet Committee. The first, Mississippi, and the second, South Carolina, are already working in their respective States. Committees have been formed in Georgia, Arkansas, and Alabama and will be announced soon. Committees are being formed in Florida and Louisiana.

The following North Carolinians comprise the State Advisory Committee:

- ARCHIE K. DAVIS, *Chairman*; chairman, Wachovia Bank & Trust Company; former president, American Bankers Association
- DR. HUBERT EATON, *Vice Chairman*; surgeon, Wilmington, N.C.
- WILBUR HOBBY, president, North Carolina AFL-CIO
- TOM FINCH, president, Thomasville Furniture Industries; senior vice president & member of board of directors, Armstrong Cork Company; former member local school board
- HARVEY BEECH, Kinston attorney; area attorney NAACP Legal Defense Fund, Inc.; immediate past president, Kinston School Board
- Y. H. ALLEN, superintendent of schools, Lumberton, N.C.
- J. MARSE GRANT, editor, Carolina Biblical Recorder, Raleigh; former president of the Southern Baptist Editors Association
- DR. W. H. PLEMMONS, president emeritus, Appalachian State University, Boone; member of the North Carolina Historical Society
- JAMES OLLIS, director, student activities, St. Andrews College, Laurinburg; immediate past president, North Carolina Jaycees; national vice president, Jaycees
- MRS. C. H. DAWSON, president, North Carolina League of Women Voters
- MRS. CARLTON G. WATKINS, president, PTA of North Carolina
- SHEARON HARRIS, president, Carolina Power and Light Company; chairman, board of trustees of Meredith College, Raleigh; director of North Carolina Educational Council on National Purposes; director, North Carolina Foundation of Church-Related Colleges
- ARTHUR TYLER, chairman emeritus, Belk Stores; president emeritus, Belk Tyler & Company; one of the founders of Wesleyan College
- JOHN STICKLEY, SR., chairman of the board, John L. Stickley Company, Inc.; former president, Lions International
- DR. MARION THORPE, president, Elizabeth City State University; president-elect, North Carolina Association of Colleges and Universities
- WILLIAM JONES, president, Boren Clay Products Company; member, State Vocational Education Advisory Committee
- SAMUEL BURFORD, principal, T. Wingate Andrews High School, High Point

File with ID # 77
Project

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6 Aug 1970

Nixon Orders Drive to Cut Paper Work

President Nixon's new Office of Management and Budget has found that the executive branch spends about \$4 billion a year on reports and related paper work, and that the public spends about 100 million man hours filling out federal forms each year, not including the income tax forms.

Nixon yesterday directed all federal agencies to aim at \$200 million reduction in their paper work costs during fiscal year 1971 and a 5 million man-hour reduction of time spent in filling out federal forms.

Dwight Ink, assistant director of the new office, said the administration has undertaken the most ambitious effort ever to streamline forms and cut down on duplication of reported information.

In the area of public health, for example, nine different programs have been consolidated into one reporting procedure, Ink said.

At the same briefing yesterday, White House Press Secretary Ronald Ziegler noted the Justice Department hopes to end its special procedure for attorneys there who are required to fill out a schedule, in 12-minute segments, of how they spent their work day.