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HANDBOOK  
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PERSONNEL

FITNESS REPORT

A GUIDE FOR COMPLETING FITNESS REPORTS (PERFORMANCE) AND (POTENTIAL)

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A GUIDE FOR COMPLETING FITNESS REPORTS (PERFORMANCE) AND (POTENTIAL)

This Handbook is for the guidance of supervisors and administrative officials in completing Fitness Reports. General policy and procedural guidance is provided in [REDACTED] Fitness Report, and on the Fitness Report Forms.

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1. WHAT IS A FITNESS REPORT?

a. A Fitness Report is a form for recording the opinion of a supervisor about the work performance, suitability for employment, and potential of a subordinate. The Report is only one element in the general evaluations which are constantly being made of employees. Reports which are prepared carefully will be extremely valuable for consideration in connection with the development of career plans and the review of personnel actions. On the other hand, Reports which do not fairly reflect the individual's performance and potential may lead to personnel actions which are detrimental to the individual, the supervisor, and to the Organization.

b. Fitness Reports will be of primary interest to two groups. Employees, being rated or evaluated, are rightfully interested because of their natural desire to know where they stand with their supervisor(s). It is the form policy of this Organization to support this right of the individual. It is also clear that management requires information on personnel performance and potential. The Report is designed so that both of these interests are met through differentiating between the evaluation of job performance--the subject of particular concern to the employee and his immediate supervisor, and the evaluation of potential--the subject of particular interest to

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secondary levels of supervision and to career service elements. Opinions concerning an individual's performance or potential can (and will) differ legitimately. Hence reports prepared by different supervisors on the same individual(s) will differ. All that is required is that each supervisor give his honest opinion after carefully observing his subordinate in action. Over a period of time the series of reports prepared by several different supervisors will provide a progressively more accurate evaluation of the individual concerned.

## 2. BACKGROUND OF THE NEW FITNESS REPORT

The initial evaluation system in the Organization was the Personnel Evaluation Report (PER) introduced in 1952. It was superceded by the first Fitness Report which was introduced on an experimental basis in November 1954 and was designed to provide a Report more suitable for selection purposes. With its introduction plans were laid for continuing study of the evaluation program. The study was largely concerned with finding out what supervisors at all levels wanted in a fitness report. This approach recognizes the controversial nature of fitness reporting, there being almost as many opinions about it as there are people. Discovering what a majority wanted and how the majority were using the then current report became the basis for the present change. Specific steps in the development were as follows:

- a. Analysis of the replies of supervisors in the questionnaire circulated about the November 1954 Fitness Report.
- b. Analysis of the content of completed Fitness Reports and statistical studies pertaining thereto.

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c. Interviews with Operating Officials, administrative officers, supervisors and personnel officers throughout the Organization concerning this subject.

d. Development of a revised Fitness Report reflecting the findings that had been arrived at in order to provide a basis for further discussions.

e. Submission of this proposed revision to a number of operating officials, administrative officers, supervisors and personnel officers, from all components, in a series of meetings for pro and con discussions concerning all aspects of evaluation reporting. Each group spent much time in analyzing and discussing the report, suggested changes, and the policies and procedures which should govern its use.

f. The draft of the Fitness Report revision was further, and quite markedly altered as a result of these meetings and presented a task force of the Career Council especially appointed for this purpose.

g. The revision was also resubmitted to the operating and administrative officials to be sure the substance of their criticisms and recommendations had been incorporated.

h. When general agreement was indicated, the proposed Fitness Report revision was recommended to the Career Council by the task force. The Council adopted the revised reports.

### 3. THE TWO PARTS OF THE FITNESS REPORT FORM

Job performance and employee potential were the two points emphasized

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during discussions with makers and users of fitness reports. The revisions reflect this emphasis. The emphasis on job performance fits in with the individual's right to know how he is doing; the emphasis on potential, primarily with an organization's right to obtain information permitting effective and fair planning. The two uses of the Report are differentiated and put into separate parts of the form to permit the application of the different policies appropriate to the purposes in each case.

a. The Fitness Report (Part I - Performance) is designed to elicit the supervisor's opinion concerning the on-the-job performance of the individual. It is concerned with the productivity quality of performance of the employee on the job in which he is performing. Except under the limited circumstances cited below, it is Organization policy that the employee has the right to see this part and know how he is performing his job. Pursuant to paragraph 2b(1) of the Regulation the supervisor may elect not to show this part of the Report, other than a Report supporting an adverse action, when one or more of the following conditions prevail:

- (1) When there exists unusual operational circumstances such as those at a small station where the rater and individual being evaluated are working and living in very close proximity and constant social interchange between them is necessary:

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- (2) When, for medical or psychological reasons, it would be illadvised to show the individual the report;
- (3) When security considerations preclude showing the report;
- (4) When the supervisor and individual being rated are so physically separated that it is impractical to show the report.

When the supervisor elects not to show the Report to the individual being rated, for one or more of the above reasons, he shall give the reasons for his action in Section B of Part I. The individual may subsequently be shown the report by the head of his Career Service upon request, security considerations permitting. Suggestions for the conduct of the discussion or interview which will accompany the showing of the Report are given in Paragraph 5, below.

- b. The Fitness Report (Part II - Potential) is designed to provide operating officials and personnel officers with an opinion concerning the potential of the employee. Such information is necessary if due consideration is to be given the employee in assignments, promotions, selection for membership in the Career Service and other actions affecting the status of the individual. This part of the Report seeks to provide management with the type of information it should have to properly use and develop personnel. It is Organization policy that it WILL NOT BE SHOWN to the individual being rated.

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4. GUIDANCE FOR RATING OFFICERS IN COMPLETING THE FITNESS REPORT (PART I - PERFORMANCE)

SECTION A. GENERAL

STATINTL All ten items of this section should be completed accurately and use should be made of official records, as necessary. Special instructions for completing this part of the Report [REDACTED] should be carefully observed.

SECTION B. CERTIFICATION

STATINTL Item 1. For the Rater - The supervisor rating a subordinate should refer to [REDACTED] Fitness Report, for guidance concerning exceptions to the policy of showing or not showing Part I of the Report to the subordinate.

Sub-Item A - The last statement of this part of the certification is not to be confused with Item 1. Item 1 will be used to indicate whether or not the individual being rated was shown the completed Report (Part I). The final statement of Item A should be checked when circumstances (i.e. - physical separation, etc.) have been such that the supervisor has not discussed, or not communicated, with the employee about his job performance.

Sub-Item B - "this date" is the date the Report is signed by the supervisor.

Sub-Items C and D - self explanatory. Note special instructions

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Item 2. For the Reviewing Official - see instructions provided below for the Reviewing Official.

Sub-Item A - "this date" is the date the Report is signed by the Reviewing Official.

Sub-Items B and C - Self explanatory. Note special instructions for

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SECTION C. JOB PERFORMANCE EVALUATION

Item 1. Rating on General Performance of Duties - Your rating of the employee in this section should be based exclusively on his work performance. It may very well be that he is potentially worth more to the Organization in another capacity or that he is very pleasant to have around or that he is in some ways a distracting influence in the office - but he must be rated on how well and how rapidly he accomplishes his assignments. Other factors are reflected later in the Report.

Item 1. COMMENTS - Add whatever clarifying comments you can concerning his performance in getting the work accomplished.

Your opinion of his productivity is wanted.

Item 2. Ratings on Performance of Specific Duties - It is rare that two jobs, even those identically classified, are exactly the same in all respects. In this part of the Report you have the opportunity to spell out, preferably in the order of their importance, the actual functions of the job being performed by the individual being rated. In the previous Item 1, you indicated an overall rating for the performance of this individual. In this item you should determine the functions he performs, list them, and

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rate each one separately.

For example: Two stenographers are working for the same supervisor. One has the special duty of managing a filing system, the other of serving as office receptionist. At least one function of each of these would be different and the employees would be rated according to the manner in which they perform such functions. Furthermore, supervisors will find that they expect different things from subordinates in terms of such factors as length of service, age, experience, etc. These conditions are reflected in the assignments given individuals and should be reflected in the rating applied in this section. Very careful consideration should be given this section because it is an important basis for evaluation of the employee for future assignments. For you it will form the main basis of the interview with the employee concerning his performance.

Item 3. Narrative Description of Manner of Job Performance - Do not essentially repeat the opinion you have expressed in Item 2 above. Instead, stress the strengths or weaknesses of the employee that have been apparent to you which you perhaps tend to use or avoid in assigning work to him. In addition, you should comment here on any extenuating circumstances (family problems, outside distractions, etc.) which you believe affect the productivity of the employee.

#### SECTION D. SUITABILITY FOR CURRENT JOB IN ORGANIZATION

As opposed to the ratings you have given the employee in the preceding section of the Report - this part should be used to evaluate or express your opinion of the employee in an overall manner as it applies in his

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providing yourself with a basis for the interview. The thought the supervisor puts into completion of this section, the care with which he marshals current illustrations to back up his ratings, and the ingenuity he spends in thinking up specific suggestions for the employee will make a great deal of difference on how the interview goes. If the interview goes badly, morale of the employee suffers. If a supervisor has any doubt about his ability to deal with the interview in a specific instance, he should consult with his supervisor.

a. General Suggestion

Having the employee participate in the determination of the elements to be rated in Section C2 is one good method of getting the interview off to a start. Such a discussion will clarify for the employee what is and has been expected from him and will lay a basis for the interview. This discussion could be held at the time the report is completed, with the employee seeing what is entered on the form. Preferably, it should be held in advance of fitness reporting time so that the employee will know on what specific duties he is going to be primarily evaluated. Supervisors must be prepared to yield a point if the employee can produce evidence that the supervisor has overlooked. But, supervisors must also be prepared to maintain their judgement when the employee has nothing but a generalized opinion not supported by specifics.

b. Specific Suggestion

- (1) Prepare for the interview. Have specific and current illustrations at hand to show why you arrived at your evaluation.
- (2) Be sure the employee understands the purpose of the interview.
- (3) Begin the discussion of how the individual rates with a good point, if at all possible. Try to give at least as much credit as criticism.

- (4) Encourage the employee to talk. Listen to him. Schedule the interview so there is no need to hurry through it. Remember the attitude the employee develops at this interview will affect both him and you for some time to come.
- (5) In discussing weaknesses:
  - (a) Be prepared with current illustrations of them.
  - (b) Be prepared with suggestions for improvement.
  - (c) Avoid weaknesses the employee can do nothing about, unless such weakness is critical, i.e., need for change in assignment or release because of this weakness.
  - (d) Keep the discussion oriented around a comparison of the employee with what you expect from him.
  - (e) Avoid making specific comparison with others during the discussion, since it may only lead to gossip in the unit and subsequent morale problems.
- (6) Close the interview on a positive note such as encouraging the employee to make suggestions on what he should do during the next rating period, or what you could do to make his job better, or a summary of what you have talked about.
- (7) Adapt these suggestions to your own personality and manner of dealing with your employees. Interviews in which a supervisor is clearly not behaving naturally are not usually successful.
- (8) Should any question arise concerning Part 11, the supervisor should state that policy forbids him to show Part 11. If the employee continues to press the discussion, you should refer him to your supervisor for further information.

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6. GUIDANCE IN COMPLETING THE FITNESS REPORT (PART 11--POTENTIAL)

SECTION E. General

All ten items of this section should be completed accurately and use should be made of official records, as necessary. Special instructions for completing this part of the Report [REDACTED]

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[REDACTED] should be carefully observed.

SECTION F. Certification

Item 1. For the ~~Water~~---Insert the date the report is signed in Sub-Item A. Sub-Items B and C are self explanatory. Note special instructions [REDACTED]

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Item 2. For the ~~Reviewing Official~~---Insert the date the report is signed in Sub-Item A. Sub-Items B and C are self explanatory.

Note special instructions [REDACTED]

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SECTION G. Estimate of Potential

Item 1. Potential to Assume Greater Responsibilities---Con- sideration should be given to the increased responsibilities that would accrue if the individual is to assume a position in the normal line of progression. In some cases, this means additional respon- sibilities within the same line of work requiring perhaps only greater self direction or increased knowledge of the work. In other instances it may involve additional functions or different ones, such as super- vision over others, planning, etc.

Item 2. Supervisory Potential---Here you are asked for the best opinion you can give. For employees who have not been in a supervisory position, the estimate should take into account any aptitude (or lack

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of it) which may have been shown by the employee, for example: in his giving on-the-job instruction to others; in his getting the cooperation of the clerks or typists; or in his assumption of leadership in tasks assigned to a small group of which he is a member. If you have had no chance to evaluate such actions on the part of the individual, you will have to rate the employee on your best guess as to how he might respond in a supervisory position, using as a guide his acceptance by others in a group as evidence of personal leadership, and his ability to organize and carry through his own work.

Item 3. Comments Concerning Potential - Add here any further remarks or clarification concerning your opinion of the employee's potential you wish to make.

#### SECTION H. Future Plans

Item 1. Training or other Developmental Experience Planned or Recommended for the Individual - Include plans for on-the-job training, developmental rotation assignments, formal internal and external training and other plans which may be incorporated in career planning.

Item 2. Note other Factors, ... - While on the basis of experience, training and other factors an individual may have varying degrees of potential, this potential is affected by other circumstances which may permanently or only temporarily condition his potential, such as family illness. Please note such here.

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## SECTION I. Description of Individual

This section requires a very critical analysis on the part of the supervisor. Each factor should be carefully considered. It is best to try to think of concrete examples in each case as the rating is applied. Remember that it is a rare case when an individual does not vary widely in 30 factors such as these covering his behavior. Approach each factor separately, without relation to others, and apply a rating. This section is a good test of the supervisor's ability to observe his subordinates.

### 7. THE IMPORTANCE OF THE RATER

Fitness Reports can be no better than the honesty and objectivity of the individual who makes them. They simply represent recorded opinions. The opinions represent the evaluation every supervisor makes during the conduct of his job.

One of the important elements in a supervisory job is the ability to make and report accurately such judgments. The supervisor has the dual responsibility of (1) reporting upwards his judgments to help management make better decisions and (2) of communicating to his subordinates his judgments to help him do his job better.

Since Fitness Reports are merely recorded opinion, they are not infallible. Standards of job performance differ, interpretation of words differ, ability to judge others differ. There is no reason for two people to inevitably agree in reporting about the performance and potential of an individual. Nor is there any reason why supervisors cannot change their

opinion as they observe the individual longer. Hence, successive reports from the same supervisors are normally expected to differ.

What can be expected from a rater under these circumstances? Basically, an honest attempt to record an opinion arrived at as objectively as he knows how. When in doubt about how to rate, make an effort to get more facts, more observations. Of one thing we are certain--attempts on the part of a supervisor to guess what standards others will use, to influence action by deliberately rating high, can only result in the long run in more errors in personnel actions than would otherwise take place and less efficient work on the part of the Organization. Over-rating out of a general feeling of kindness is one of the most difficult matters for a rater to control. He should consider the following:

- a. It is no real favor to an employee to overrate him because:

- (1) Such evaluations often lead to assignments of duties and responsibilities which the individual cannot master.
- (2) It may very well obscure the fact that additional training for the individual would be desirable.
- (3) It merely tends to put off a supervisory problem which should be met as the employee develops his work habits and practices.

- b. Of even greater importance, perhaps, is the fact that overrating some individuals is unfair to those doing as good or a better job. There is a limit to the upper ranges of a rating scale and to the extent individuals are over-



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rated, the upper end of the scale becomes less meaningful in those cases when it is actually needed.

#### 8. THE ROLE OF THE REVIEWING OFFICIAL

Primarily the reviewing official has the responsibility of deciding for himself whether the supervisor is either under or overrating the employee concerned. Reviewing officials should recognize that their frame of reference concerning an employee with whom they may have contact only occasionally is different from that of the rating supervisor who normally is in constant contact with the individual. On the other hand, he should be better able to rate the ability of the supervisor to rate his subordinates, one of the major functions in his evaluation of the supervisor. Reviewing officials are specifically asked not to require supervisors to re-write Fitness Reports with which they do not agree. Instead, the proper procedure for the reviewing official is to add to the Report, in the space provided, his comments on the rating given by the supervisor. The evaluation provided by the supervisor should be his own opinion. It is stressed that some disagreement between rater and reviewer is normal and expected.

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FITNESS REPORT (Part I) PERFORMANCE

INSTRUCTIONS

FOR THE ADMINISTRATIVE OFFICER: Consult current instructions for completing this report. FOR THE SUPERVISOR: This report is designed to help you express your evaluation of your subordinate and to transmit this evaluation to your supervisor and senior officials.

SECTION A. GENERAL
1. NAME (Last) (First) (Middle)
2. DATE OF BIRTH
3. SEX
4. SERVICE DESIGNATION
5. OFFICE/DIVISION/BRANCH OF ASSIGNMENT
6. OFFICIAL POSITION TITLE
7. GRADE
8. DATE REPORT DUE IN OP
9. PERIOD COVERED BY THIS REPORT (Inclusive dates)
10. TYPE OF REPORT (Check one) INITIAL ANNUAL REASSIGNMENT-SUPERVISOR REASSIGNMENT-EMPLOYEE SPECIAL (Specify)

SECTION B. CERTIFICATION
1. FOR THE RATER: THIS REPORT [ ] HAS [ ] HAS NOT BEEN SHOWN TO THE INDIVIDUAL RATED. IF NOT SHOWN, EXPLAIN WHY NOT:
A. CHECK (X) APPROPRIATE STATEMENTS:
THIS REPORT REFLECTS MY OWN OPINIONS OF THIS INDIVIDUAL.
THIS REPORT REFLECTS THE COMBINED OPINIONS OF MYSELF AND PREVIOUS SUPERVISORS.
I HAVE DISCUSSED WITH THIS EMPLOYEE HIS STRENGTHS AND WEAKNESSES SO THAT HE KNOWS WHERE HE STANDS.
IF INDIVIDUAL IS RATED "I" IN C1 OR D, A WARNING LETTER WAS SENT TO HIM & A COPY ATTACHED TO THIS REPORT.
I CANNOT CERTIFY THAT THE RATED INDIVIDUAL KNOWS HOW TO EVALUATE HIS JOB PERFORMANCE BECAUSE (Specify):
B. THIS DATE
C. TYPED OR PRINTED NAME AND SIGNATURE OF SUPERVISOR
D. SUPERVISOR'S OFFICIAL TITLE

2. FOR THE REVIEWING OFFICIAL: RECORD ANY SUBSTANTIAL DIFFERENCE OF OPINION WITH THE SUPERVISOR, OR ANY OTHER INFORMATION, WHICH WILL LEAD TO A BETTER UNDERSTANDING OF THIS REPORT.
I certify that any substantial difference of opinion with the supervisor is reflected in the above section.
A. THIS DATE
B. TYPED OR PRINTED NAME AND SIGNATURE OF REVIEWING OFFICIAL
C. OFFICIAL TITLE OF REVIEWING OFFICIAL

SECTION C. JOB PERFORMANCE EVALUATION
1. RATING ON GENERAL PERFORMANCE OF DUTIES
DIRECTIONS: Consider ONLY the productivity and effectiveness with which the individual being rated has performed his duties during the rating period. Compare him ONLY with others doing similar work at a similar level of responsibility. Factors other than productivity will be taken into account later in Section D.
1 - DOES NOT PERFORM DUTIES ADEQUATELY; HE IS INCOMPETENT.
2 - BARELY ADEQUATE IN PERFORMANCE; ALTHOUGH HE HAS HAD SPECIFIC GUIDANCE OR TRAINING, HE OFTEN FAILS TO CARRY OUT RESPONSIBILITIES.
3 - PERFORMS MOST OF HIS DUTIES ACCEPTABLY; OCCASIONALLY REVEALS SOME AREA OF WEAKNESS.
4 - PERFORMS DUTIES IN A COMPETENT, EFFECTIVE MANNER.
5 - A FINE PERFORMANCE; CARRIES OUT MANY OF HIS RESPONSIBILITIES EXCEPTIONALLY WELL.
6 - PERFORMS HIS DUTIES IN SUCH AN OUTSTANDING MANNER THAT HE IS EQUALLED BY FEW OTHER PERSONS KNOWN TO THE SUPERVISOR.
INSERT RATING NUMBER

COMMENTS:

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2. RATINGS ON PERFORMANCE OF SPECIFIC DUTIES

DIRECTIONS:

- a. State in the spaces below up to six of the more important SPECIFIC duties performed during this rating period. Place the most important first. Do not include minor or unimportant duties.
- b. Rate performance on each specific duty considering ONLY effectiveness in performance of this specific duty.
- c. For supervisors, ability to supervise will always be rated as a specific duty (do not rate as supervisors those who supervise a secretary only).
- d. Compare in your mind, when possible, the individual being rated with others performing the same duty at a similar level of responsibility.
- e. Two individuals with the same job title may be performing different duties. If so, rate them on different duties.
- f. Be specific. Examples of the kind of duties that might be rated are:

ORAL BRIEFING	HAS AND USES AREA KNOWLEDGE	CONDUCTS INTERROGATIONS
GIVING LECTURES	DEVELOPS NEW PROGRAMS	PREPARES SUMMARIES
CONDUCTING SEMINARS	ANALYZES INDUSTRIAL REPORTS	TRANSLATES GERMAN
WRITING TECHNICAL REPORTS	MANAGES FILES	DEBRIEFING SOURCES
CONDUCTING EXTERNAL LIAISON	OPERATES RADIO	KEEPS BOOKS
TYPING	COORDINATES WITH OTHER OFFICES	DRIVES TRUCK
TAKING DICTATION	WRITES REGULATIONS	MAINTAINS AIR CONDITIONING
SUPERVISING	PREPARES CORRESPONDENCE	EVALUATES SIGNIFICANCE OF DATA

- g. For some jobs, duties may be broken down even further if supervisor considers it advisable, e.g., combined key and phone operation, in the case of a radio operator.

DESCRIPTIVE RATING NUMBER	1 - INCOMPETENT IN THE PERFORMANCE OF THIS DUTY	6 - PERFORMS THIS DUTY IN AN OUTSTANDING MANNER FOUND IN VERY FEW INDIVIDUALS HOLDING SIMILAR JOBS
	2 - BARELY ADEQUATE IN THE PERFORMANCE OF THIS DUTY	7 - EXCELS ANYONE I KNOW IN THE PERFORMANCE OF THIS DUTY
	3 - PERFORMS THIS DUTY ACCEPTABLY	
	4 - PERFORMS THIS DUTY IN A COMPETENT MANNER	
	5 - PERFORMS THIS DUTY IN SUCH A FINE MANNER THAT HE IS A DISTINCT ASSET ON HIS JOB	

SPECIFIC DUTY NO. 1	RATING NUMBER	SPECIFIC DUTY NO. 4	RATING NUMBER
SPECIFIC DUTY NO. 2	RATING NUMBER	SPECIFIC DUTY NO. 5	RATING NUMBER
SPECIFIC DUTY NO. 3	RATING NUMBER	SPECIFIC DUTY NO. 6	RATING NUMBER

3. NARRATIVE DESCRIPTION OF MANNER OF JOB PERFORMANCE

DIRECTIONS: Stress strengths and weaknesses, particularly those which affect development on present job.

SECTION D. SUITABILITY FOR CURRENT JOB IN ORGANIZATION

DIRECTIONS: Take into account here everything you know about the individual...productivity, conduct in the job, pertinent personal characteristics or habits, special defects or talents...and how he fits in with your team. Compare him with others doing similar work of about the same level.

- 1 - DEFINITELY UNSUITABLE - HE SHOULD BE SEPARATED
- 2 - OF DOUBTFUL SUITABILITY...WOULD NOT HAVE ACCEPTED HIM IF I HAD KNOWN WHAT I KNOW NOW
- 3 - A BARELY ACCEPTABLE EMPLOYEE...BELOW AVERAGE BUT WITH NO WEAKNESSES SUFFICIENTLY OUTSTANDING TO WARRANT HIS SEPARATION
- 4 - OF THE SAME SUITABILITY AS MOST PEOPLE I KNOW IN THE ORGANIZATION
- 5 - A FINE EMPLOYEE - HAS SOME OUTSTANDING STRENGTHS
- 6 - AN UNUSUALLY STRONG PERSON IN TERMS OF THE REQUIREMENTS OF THE ORGANIZATION
- 7 - EXCELLED BY ONLY A FEW IN SUITABILITY FOR WORK IN THE ORGANIZATION

IS THIS INDIVIDUAL BETTER SUITED FOR WORK IN SOME OTHER POSITION IN THE ORGANIZATION?  YES  NO. IF YES, EXPLAIN FULLY:

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FITNESS REPORT (Part II) POTENTIAL

INSTRUCTIONS

FOR THE ADMINISTRATIVE OFFICER: Consult current instructions for completing this report.

FOR THE SUPERVISOR: This report is a privileged communication to your supervisor, and to appropriate career management and personnel officials concerning the potential of the employee being rated. It is NOT to be shown to the rated employee. It is recommended that you read the entire report before completing any question. This report is to be completed only after the employee has been under your supervision FOR AT LEAST 90 DAYS. If less than 90 days, hold and complete after the 90 days has elapsed. If this is the INITIAL REPORT on the employee, however, it MUST be completed and forwarded to the OP no later than 30 days after the due date indicated in item 8 of Section "E" below.

SECTION E. GENERAL

1. NAME (Last) (First) (Middle)			2. DATE OF BIRTH	3. SEX	4. SERVICE DESIGNATION
5. OFFICE/DIVISION/BRANCH OF ASSIGNMENT			6. OFFICIAL POSITION TITLE		
7. GRADE	8. DATE REPORT DUE IN OP	9. PERIOD COVERED BY THIS REPORT (Inclusive dates)			
10. TYPE OF REPORT (Check one)		INITIAL	REASSIGNMENT-SUPERVISOR	SPECIAL (Specify)	
		ANNUAL	REASSIGNMENT-EMPLOYEE		

SECTION F. CERTIFICATION

1. FOR THE RATER: I CERTIFY THAT THIS REPORT REPRESENTS MY BEST JUDGEMENT OF THE INDIVIDUAL BEING RATED

A. THIS DATE	B. TYPED OR PRINTED NAME AND SIGNATURE OF SUPERVISOR	C. SUPERVISOR'S OFFICIAL TITLE
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2. FOR THE REVIEWING OFFICIAL: I HAVE REVIEWED THIS REPORT AND NOTED ANY DIFFERENCE OF OPINION IN ATTACHED MEMO.

A. THIS DATE	B. TYPED OR PRINTED NAME AND SIGNATURE OF REVIEWING OFFICIAL	C. OFFICIAL TITLE OF REVIEWING OFFICIAL
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SECTION G. ESTIMATE OF POTENTIAL

1. POTENTIAL TO ASSUME GREATER RESPONSIBILITIES

DIRECTIONS: Considering others of his grade and type of assignment, rate the employee's potential to assume greater responsibilities. Think in terms of the kind of responsibility encountered at the various levels in his kind of work.

RATING NUMBER	1 - ALREADY ABOVE THE LEVEL AT WHICH SATISFACTORY PERFORMANCE CAN BE EXPECTED
	2 - HAS REACHED THE HIGHEST LEVEL AT WHICH SATISFACTORY PERFORMANCE CAN BE EXPECTED
	3 - MAKING PROGRESS, BUT NEEDS MORE TIME BEFORE HE CAN BE TRAINED TO ASSUME GREATER RESPONSIBILITIES
	4 - READY FOR TRAINING IN ASSUMING GREATER RESPONSIBILITIES
	5 - WILL PROBABLY ADJUST QUICKLY TO MORE RESPONSIBLE DUTIES WITHOUT FURTHER TRAINING
	6 - ALREADY ASSUMING MORE RESPONSIBILITIES THAN EXPECTED AT HIS PRESENT LEVEL
	7 - AN EXCEPTIONAL PERSON WHO IS ONE OF THE FEW WHO SHOULD BE CONSIDERED FOR EARLY ASSUMPTION OF HIGHER LEVEL RESPONSIBILITIES

2. SUPERVISORY POTENTIAL

DIRECTIONS: Answer this question: Has this person the ability to be a supervisor?  Yes  No If your answer is YES, indicate below your opinion or guess of the level of supervisory ability this person will reach AFTER SUITABLE TRAINING. Indicate your opinion by placing the number of the descriptive rating below which comes closest to expressing your opinion in the appropriate column. If your rating is based on observing him supervise, note your rating in the "actual" column. If based on opinion of his potential, note the rating in the "potential" column.

DESCRIPTIVE RATING NUMBER	0 - HAVE NO OPINION ON HIS SUPERVISORY POTENTIAL IN THIS SITUATION
	1 - BELIEVE INDIVIDUAL WOULD BE A WEAK SUPERVISOR IN THIS KIND OF SITUATION
	2 - BELIEVE INDIVIDUAL WOULD BE AN AVERAGE SUPERVISOR IN THIS KIND OF SITUATION
	3 - BELIEVE INDIVIDUAL WOULD BE A STRONG SUPERVISOR IN THIS SITUATION

ACTUAL	POTENTIAL	DESCRIPTIVE SITUATION
		A GROUP DOING THE BASIC JOB (truck drivers, stenographers, technicians or professional specialists of various kinds) WHERE CONTACT WITH IMMEDIATE SUBORDINATES IS FREQUENT (First line supervisor)
		A GROUP OF SUPERVISORS WHO DIRECT THE BASIC JOB (Second line supervisors)
		A GROUP, WHO MAY OR MAY NOT BE SUPERVISORS, WHICH IS RESPONSIBLE FOR MAJOR PLANS, ORGANIZATION AND POLICY (Executive level)
		WHEN CONTACT WITH IMMEDIATE SUBORDINATES IS NOT FREQUENT
		WHEN IMMEDIATE SUBORDINATES' ACTIVITIES ARE DIVERSE AND NEED CAREFUL COORDINATION
		WHEN IMMEDIATE SUBORDINATES INCLUDE MEMBERS OF THE OPPOSITE SEX

**SECRET**  
(When Filled In)

3. INDICATE THE APPROXIMATE NUMBER OF MONTHS THE RATED EMPLOYEE HAS BEEN UNDER YOUR SUPERVISION  
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4. COMMENTS CONCERNING POTENTIAL

**SECTION H. FUTURE PLANS**

1. TRAINING OR OTHER DEVELOPMENTAL EXPERIENCE PLANNED FOR THE INDIVIDUAL

2. NOTE OTHER FACTORS, INCLUDING PERSONAL CIRCUMSTANCES, TO BE TAKEN INTO ACCOUNT IN INDIVIDUAL'S FUTURE ASSIGNMENTS

**SECTION I. DESCRIPTION OF INDIVIDUAL**

**DIRECTIONS:** This section is provided as an aid to describing the individual as you see him on the job. Interpret the words literally. On the page below are a series of statements that apply in some degree to most people. To the left of each statement is a box under the heading "category." Read each statement and insert in the box the category number which best tells how much the statement applies to the person covered by this report.

- X - HAVE NOT OBSERVED THIS; HENCE CAN GIVE NO OPINION AS TO HOW THE DESCRIPTION APPLIES TO THE INDIVIDUAL
- CATEGORY NUMBER    1 - APPLIES TO THE INDIVIDUAL TO THE LEAST POSSIBLE DEGREE  
                           2 - APPLIES TO INDIVIDUAL TO A LIMITED DEGREE  
                           3 - APPLIES TO INDIVIDUAL TO AN AVERAGE DEGREE  
                           4 - APPLIES TO INDIVIDUAL TO AN ABOVE AVERAGE DEGREE  
                           5 - APPLIES TO INDIVIDUAL TO AN OUTSTANDING DEGREE

CATEGORY	STATEMENT	CATEGORY	STATEMENT	CATEGORY	STATEMENT
	1. ABLE TO SEE ANOTHER'S POINT OF VIEW		11. HAS HIGH STANDARDS OF ACCOMPLISHMENT		21. IS EFFECTIVE IN DISCUSSIONS WITH ASSOCIATES
	2. CAN MAKE DECISIONS ON HIS OWN WHEN NEED ARISES		12. SHOWS ORIGINALITY		22. IMPLEMENTS DECISIONS REGARDLESS OF OWN FEELINGS
	3. HAS INITIATIVE		13. ACCEPTS RESPONSIBILITIES		23. IS THOUGHTFUL OF OTHERS
	4. IS ANALYTIC IN HIS THINKING		14. ADMITS HIS ERRORS		24. WORKS WELL UNDER PRESSURE
	5. STRIVES CONSTANTLY FOR NEW KNOWLEDGE AND IDEAS		15. RESPONDS WELL TO SUPERVISION		25. DISPLAYS JUDGEMENT
	6. KNOWS WHEN TO SEEK ASSISTANCE		16. DOES HIS JOB WITHOUT STRONG SUPPORT		26. IS SECURITY CONSCIOUS
	7. CAN GET ALONG WITH PEOPLE		17. COMES UP WITH SOLUTIONS TO PROBLEMS		27. IS VERSATILE
	8. HAS MEMORY FOR FACTS		18. IS OBSERVANT		28. HIS CRITICISM IS CONSTRUCTIVE
	9. GETS THINGS DONE		19. THINKS CLEARLY		29. FACILITATES SMOOTH OPERATION OF HIS OFFICE
	10. CAN COPE WITH EMERGENCIES		20. COMPLETES ASSIGNMENTS WITHIN ALLOWABLE TIME LIMITS		30. DOES NOT REQUIRE STRONG AND CONTINUOUS SUPERVISION

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