

AGENDA

OTR Management Conference

21 November 1974, 1030

1. - Develop a costing methodology for users of OTR services 25X1
+Does the plan advanced on the DD/A Plans Staff have application for OTR?
2. - Provide an MBO training program for Agency managers during FY 1975 25X1
+OTR requests DD/A approval of the revised objective
+Any progress on the selection of a consultant?
3. - Implement a program of research and study of the intelligence process 25X1
+Has any more thought been given to the use of CIA retirees for the study?
+The milestones have been slipped. The new action plans does not include the detail of the Discussion Group Programs. Will a new action plan be available before January?
4. - Systematically review the OTR Curriculum and recommend changes 25X1
+What are findings of the Curriculum Committee review?
5. - Establish a Media Center in Hdqs by the end of FY 1975 25X1
+How far ahead is the status of this objective?
+Any logistical problems foreseen?
6. - Analyze component needs to fill language designated positions with qualified personnel 25X1
+What are the results of language studies made to date?
+Are the Divisions using the study reports profitably? Will they be re-examining their recruiting or selection criteria?

7. - Establish a data base for tabulating trends, calculating requirements, maintaining history and status reporting

25X1

+What part has caused delay?

8. - Select CT's semi-annually from a maximum of applicant files in process

225X1
25X1

9. - Study cost effectiveness of maintaining

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25X1

+To be tracked jointly with OP when PMCD begins evaluation of staff and contract positions

10 Review OTR's professional competence and develop a long-range personnel maintenance and replacement plan

25X1

11. Status report on progress toward 1974 EEO Affirmative Action Plan

12. Status report on progress toward implementation of the APP

13. Are there any new objectives which OTR could add during FY 1975?

AGENDA

Joint Management Conference - OTR, OF, OJCS

21 November 1974, 1115

1. - Develop a curriculum of accounting, budgeting and financial management courses tailored to Agency requirements (OF).

25X1

+According to critiques of first two pilot runnings (Sept-Oct), what has been the general student evaluation?

2. - Redesign the Agency Training Record (OJCS).

25X1

+What are results of Milestone #5 completion?

Briefing Notes for DDA Management Conference

21 November 1974

Objective No.

Using the OTR cost model developed in FY 74, prepare cost evaluations on all courses offered by OTR units by the end of FY 1975.

COMMENT

Collection of course data is 95 per cent complete. All course data has been collected except for courses. The data is also used in responding to requirements from the DDA Cost of Services Task Force.

Objective No.

Provide an MBO training program for Agency managers during FY 75.

COMMENT

The objective statement has been completely revised and a new action plan developed. The sources for an MBO consultant have been narrowed to the Federal Executive Institute and the University of Maryland. Under Milestone Number Two which reads "Conduct a problem-solving seminar to identify DCI expectations; Directorate MBO practices and to identify training needs" we plan a two or three day seminar with the senior planning officer from each Directorate and the Office of the Comptroller. (see attachment from)

Objective No.

Implement by the end of FY 75 a program of research and study of the intelligence process; introduce a new format for the discussion of important substantive and procedural issues in intelligence.

COMMENT

A vacancy notice for a research director, Center for the Study of Intelligence was circulated as approved in the last Management Conference. We have received responses

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from two highly qualified applicants. The positions within OTR which can be allocated to the Program have been identified. Personnel have not been assigned and no substantive progress has been made. We have submitted a new action plan which reflects a more realistic appraisal of our status.

Objective No.

Complete by the end of FY 75 the systematic review of OTR curriculum and prepare recommendations for needed changes.

COMMENT

The milestones are on target. The Curriculum Committee met 18-20 November to develop preliminary recommendations. The results will be available to the DTR next week.

Objective No.

Establish a media center in Headquarters Building by the end of FY 75 to provide facilities for the Self-Study Program, the University of Maryland Instructional TV Network Programs, the Language Laboratory, the OJCS Self-Study Program, and related programs.

COMMENT

Construction of the media center is under way in Headquarters space GJ-68. It is estimated that the Center will be completed by mid-December. The University of Maryland Instructional TV Network will not be available until August of 1975. The University of Maryland is still waiting for action on the network by the University Board of Regents. The media center will contain two classrooms for languages courses and the large classroom for the University of Maryland Program will be available to language courses until the ITV network becomes operational.

Objective No.

As part of language development program, analyze operating components need for filling language designated positions with language qualified personnel; advise them of additional skills needed to be acquired through recruitment/

training; emphasis on DDO field positions.

COMMENT

The study is completed for the DDO. We are now preparing for the study of the DDI and the DDA. DDO reaction has been very favorable. One effect is that language training requirements are more precise.

Objective

By the end of 1975, establish systematic plan for collection of data resulting in establishment of a data base for tabulating trends; calculating requirements; maintaining history; and reporting current status.

COMMENT

We are lacking documentation of results. Milestone Number Four "Identify design modules, establish implementation priorities" is slipping, but we plan to catch up before the next Management Conference. At this point, it appears that there will not be many OJCS processing requests involved. We will be able to use our data base largely by manual means. As a result of the OTR Management Conference at the DTS, we plan to develop an internal planning cycle which we hope will anticipate the needs of Directorate management as well as our internal management needs. This should enable us to further define our implementation priorities.

Objective

Beginning in FY 75, select CTS--total of annually--twice a year from a maximum of applicant files placed in process at any one time.

COMMENT

As of the end of October, we have applicants' processing for EOD January 1975 completed against a target of . Appears we will meet the needs of the CT Program. See attached memo from the DTR to the Comptroller, through the DD/A, subject, "Response to Questions Raised at OTR's OMB Hearing," dated 13 November 1974.

Objective

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By end of CY 1974, conduct a thorough review of OTR professional competence and devise a long-range plan for ensuring that OTR develops and replaces or maintains continuity of its professional personal requirements.

COMMENT

All data has been compiled and analyzed. Recommendations have been discussed. Action on this objective is at a standstill because of personnel and budget cuts. Further action depends on future trends. A major problem is the imminent loss of OTR personnel with overseas experience.

Proposed New Objective

New course, "Dependents Orientation."

COMMENT

The Office of Training proposes as a new objective to be accomplished by the end of FY 1975 the development and running of a new course for dependents of new employees entitled "Dependents Orientation." The course would use all OTR personnel and existing course materials.

Joint Objectives

Objective

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By the end of FY 75 in conjunction with the Office of Finance, develop tutorial services and normal courses of instruction in Finance management improvement.

COMMENT

We have added the last milestone No. 8 per the last Management Conference. The courses have gone exceptionally well in terms of student participation and reaction and in OTR administrative terms. Everything is on video tape. Mr. Colby's presentation is getting extensive distribution. Other tapes will be used to review the content and style. The tapes of the Congressional Representatives (Messrs. Wilhelm and Preston) have been used in the current running of the Senior Seminar. OTR is satisfied that the course is meeting its objectives. We look to the Office of Finance for confirmation. (Training Bulletin attached)

Objective (OJCS)

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By the end of FY 1975 review the Agency Training Record (ATR), timeframes for input/output, and present design, to make it more responsive to requirements.

COMMENT

The major focus in accomplishing this Objective is internal adjustments to manual procedures. The goal is to get data into this system earlier. We foresee no great change to the Agency Training Record. However, there will be changes to the way it is updated. More precise details in accomplishing this Objective are waiting on the decision as to whether a Data Access Center will be in the Chamber of Commerce Building.

Objective B57508 (OP)

By the end of FY 75, conduct a study of the cost of maintaining

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COMMENT

We revised the Objective statement leaving out "effectiveness" for cost and "conclusive" for study. Discussion of this objective has been deferred until Mr. McMahon returns.

18 November 1974

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To:

Subject: DDA Bi-Monthly Review -- Position on MBO Training

The following position on MBO training might be taken Thursday
in the ~~OTR-DA~~ bi-monthly review:

Recommendation: OTR feels that a stand-alone course (of about
three days' duration) on MBO should be
established.

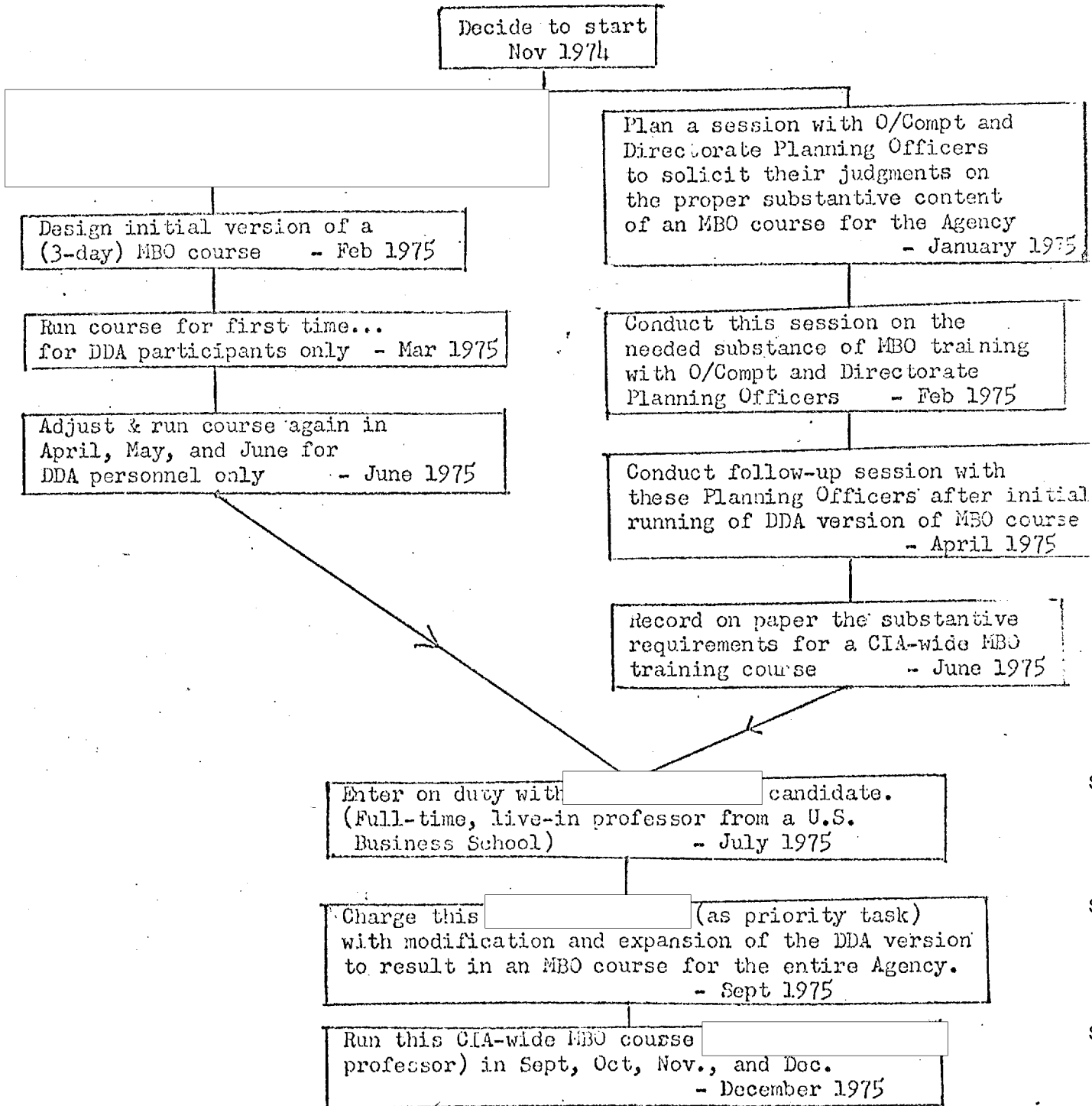
(At present, MBO is treated as a sub-topic
within on-going OTR courses.)

Need:

- MBO is the official "management system" for the U.S. Government.
- The DCI has personally identified himself with the basic concepts of MBO and has vigorously pushed their use throughout the Agency.
- Each Directorate has developed its own way of applying these concepts; the resultant systems are no doubt more divergent than is justified by legitimate differences among Directorate environments.
- No Directorate is fully satisfied with results achieved so far. Unclear focus is typical down through the ranks. -- As a specific, the DDA has recently expressed concern that MBO is not adequately understood and is not functioning well within the Administration Directorate. Additional training is presumed to be part of the answer.
- Whatever system replaces "MBO" in the future will nonetheless be an outgrowth of and draw upon key aspects of the MBO system. Agencies which have relatively strong MBO systems will be able to move with greater ease and success to the new system. Thus, CIA has a long-term stake in learning how to use more effectively such organization-wide management systems.

Action Plan:

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(dmd) 77.

DTR=0939

31 OCT 1974

MEMORANDUM FOR: Deputy Director for Administration

SUBJECT : MBO Training

REFERENCE : Memo from [redacted] to DTR, same subject,
dated 17 October 1974

Let me answer your inquiry concerning MBO training for the Administration Directorate in the following four parts:

1. Past and Present Coverage of MBO in OTR Courses:

a. [redacted]

From August 1973 - July 1974, OTR had under full-time contract [redacted]. One of [redacted] principal tasks was MBO training. He presented classroom lectures on MBO within our management courses. He also worked in a consultative role on MBO within a few Agency components, particularly within the Central Reference Service (CRS) of the DDI where he worked from the top down in assisting to implement MBO within CRS. This was a very time consuming effort both for [redacted] and for CRS. CRS estimates it devoted 70,000 manhours to this effort.

b. Fundamentals of Supervision and Management (FSM)

Since the fall of 1973, MBO has been covered within the one-week FSM course (for first line supervisors).

While [redacted] was here, a two-hour lecture session was devoted to MBO...covering the history of development, the concept, the characteristics of the system, and the implementation process. No student exercises were used.

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Recently, OTR has expanded the time devoted to MBO in this course to one-half day. This new half-day session includes a lecture on the concept and characteristics of the MBO system plus three student exercises in which students practice the writing of objectives against a check list of desirable characteristics. Students also critique (and suggest improvements to) CIA's MBO system as experienced by the students in their present jobs.

c. Management Seminar (MS) - (Formerly "Advanced Management Program")

25X1 During [redacted] tour with OTR, MBO was allocated about one day in the three-week Management Seminar (for middle level managers).

25X1 However, in the most current running of the MS course a full two-day session on MBO is planned. This session will cover the history of development of MBO within the management discipline, the installation of MBO within CIA, strengths and weaknesses of the CIA experience with MBO, and a series of student exercises in writing objectives, action plans, and LOI's. These exercises will consume most of this two-day period. This section on MBO will be run by a contractor [redacted]

25X1 [redacted] A wrap-up session with [redacted] O/Compt will also be included at the end of the MBO section.

d. Senior Seminar

25X1 [redacted] have addressed past Senior Seminars on MBO in a two-hour time block.

In neither case was the session judged very successful by Seminar members. Plans for coverage of MBO in the next Senior Seminar have not yet been finalized.

e. Survey of Financial Management

Although the subject of MBO is not explicitly included in the schedule for this new course, the topic naturally comes up repeatedly in comments on financial management by several of the speakers (e.g., [redacted] O/Compt; [redacted] DDO Plans Staff; Carl Duckett; and the DCI himself).

2. OTR Plans for Additional MBO Training:

a. Three-Day Course on MBO

OTR feels there is a requirement for more extensive training on MBO than has been provided in our in-house courses to date. Accordingly, we have in recent weeks been seeking a contractor who could design and present a three-day course on MBO. OTR expects to select a contractor for this purpose in November 1974. We have under consideration now the following possible suppliers of such a training program:

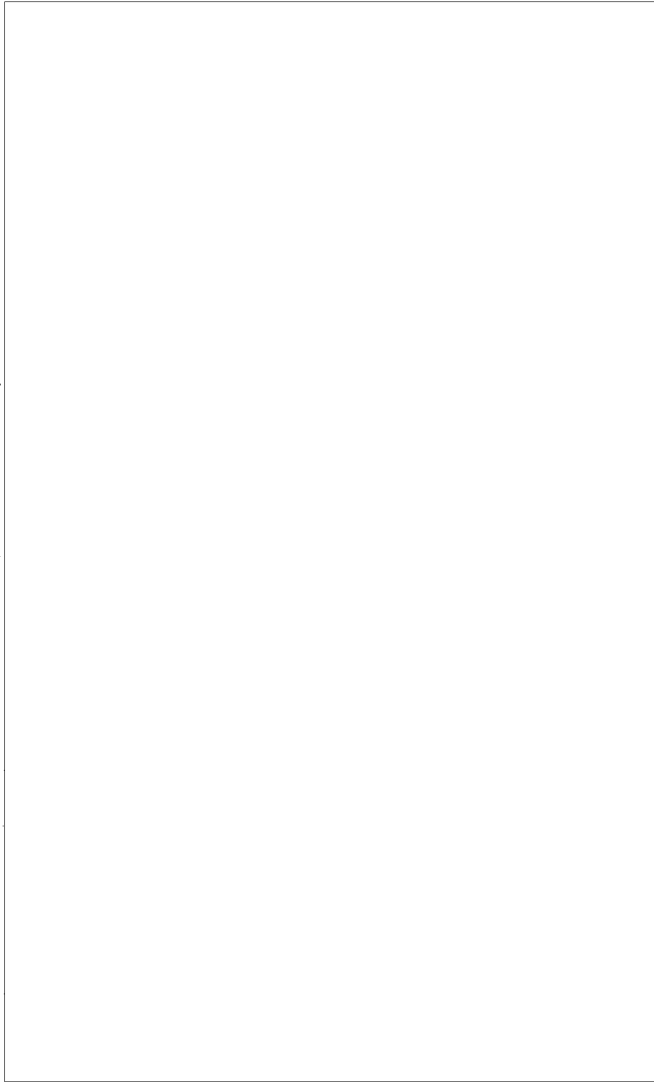
1) [redacted]

[redacted] is willing to assist OTR in the design and presentation of a 3-day MBO course. [redacted] is Chairman of the one-week MBO course offered twice a year. [redacted] is not available for such an effort until January 1975. He would present one or two runings and then expect to turn the program over to OTR. He is not available on a continuing basis.

2) [redacted]

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3)



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4)

5) Civil Service Commission

The CSC is offering a new 3-day course for first line supervisors on MBO. This course will be given in November 1974. An OTR representative will attend this course. If judged effective for our purposes, we might arrange that this course be given in-house for CIA students.

25X1



7) American Assembly of Collegiate Schools of Business (AACSB)

OTR has taken steps to participate in the AACSB Federal Faculty Fellowship Program. If our effort is successful, a Professor selected from one of the 600 participating American Business Schools would enter on full-time duty for one year with OTR (as a Faculty Fellow) starting in July 1975 and each July thereafter, so long as we participate in the program. This AACSB program, thus, could provide OTR on a continuing basis a full-time consultant and lecturer from the University environment. The running of a three-day MBO course would be included in the duties of such an individual. (Note: earliest entry on duty = July 1975)

3. Alternatives re MBO Training for the Administration Directorate:

Alternative a: Training Course

Design and conduct an MBO training program (perhaps 3-day course) for DD/A personnel only (multiple sessions) to clarify the concept, implementation, and use of MBO.

(Conducted by contractor to be selected in November by OTR [per para. 2a above] or conducted by a contractor selected by the DD/A).

Alternative b: Consultant

Hire a consultant to work component-by-component within the Directorate to clarify and further implement the MBO system.

(Use the contractor to be selected in November by OTR or use a different contractor selected by the DD/A).

Alternative c: MBO "Implementors"

Designate an MBO Officer (or "Implementor") within each DDA component; train these officers as a team; grant to these officers responsibility and authority to implement and enforce MBO practices within their respective components.

(The requisite training could be given by the OTR contractor or by a contractor selected by the DD/A).

4. Conclusions:

- a. If you wish to clarify the concept of MBO and thereby facilitate better day-to-day practice of MBO by the line command throughout the Directorate, expecting from MBO some better discipline in planning ahead and in controlling on-going performance yet leaving the format, implementation, and conduct of MBO largely in local hands...then Alternative a (training course) would seem an appropriate step.

- b. If you wish to provide some Directorate-wide standards for MBO and to "force-draft" the implementation and use of MBO component-by-component, expecting a Directorate MBO system to be defined and installed through extensive consultation with each component of the DDA...then Alternative b (consultant) would seem appropriate.
- c. If you wish to set up a special command channel throughout the Directorate for MBO, expecting a system to be defined and aggressively implemented and enforced by DDA officers especially designated for that purpose...then Alternative c (MBO "implementors") would seem appropriate.

The Office of Training will, of course, do all it can to assist in whatever course of action you select.



Alfonso Rodriguez
Director of Training

Distribution:

- 0 & 1 - Adse.
- 2 - DTR
- 2 - MATB

OTR/MATB/ [redacted] js (31 Oct. 74)

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ADMINISTRATIVE - INTERNAL USE ONLY

DIR-1041

18 NOV 1974

MEMORANDUM FOR: Deputy Director for Administration

ATTENTION : Special Assistant for Resources

SUBJECT : Language Learning Center Part-time Contract Employment

REFERENCE : Memo dtd 1 Nov 74 to ADD/A fm DTR; subject: Contract Ceiling

1. While OTR may not be in a position to have all the facts, it seems now, based on the information we do have, that the use and funding of non-ceiling part-time employees in FY 76 is a challenging problem yet to be solved. Solution of the problem would seem to depend on first clarifying the Language Learning Center's (LLC) full-time contract ceiling for FY 76 as explained in the referent memorandum. (We know you are working on this matter.) Then, following resolution of that problem, we must decide on the level and cost of part-time employment. To assist you further in solving these problems and providing guidance to OTR, we have summarized our essential needs for the LLC in the following table:

	<u>Ceiling</u>	<u>A.E.</u>
Full-time contracts		
Part-time contracts		
Staff		

25X1

2. The above A.E. is so minimal that it does not provide funds for any double slotting, a significant handicap that could later cause some headaches for management. Nevertheless, we feel that we must be realistic in the extreme in stating our requirements for the LLC.

5

ADMINISTRATIVE - INTERNAL USE ONLY

ADMINISTRATIVE - INTERNAL USE ONLY

3. We would appreciate your guidance on additional information that should be submitted to the DDA Plans Staff and the Comptroller to ensure that we have sufficient funds for meeting LLC requirements in FY 76.

[Redacted Signature]

Alfonso Rodriguez
Director of Training

Att:
Copy of Referent

Distribution:

- 0 & 1 - Adse. w/att
- 1 - C/PDS w/o att
- 1 - LLC w/o att
- 2 - DTR

OTR/[Redacted] kaj 15 Nov 74

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ADMINISTRATIVE - INTERNAL USE ONLY

[REDACTED]

Building Renovation Schedule

1. Projects (in yellow 1-11) indicate how military money will be spent.

2. Schedule appears to be realistic and on target.

3. Results will be:

(1) All instructional unit chiefs will be housed in ✓

[REDACTED]

(2) [REDACTED] will be an efficient, well-equipped ✓
admin and training (classroom training) center.

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