

CONFIDENTIAL

DD/O 73-2311

17 April 1973

MEMORANDUM FOR: Deputy Director for Operations

VIA: Chief, Operational Services

SUBJECT: Findings of the Management Task Force

1. The Director of Training, acting on Mr. William E. Colby's expressed interest in a "branch chief's course," established a Management Task Force in January 1973. Chaired by OTR, the Task Force comprised representatives from the four Directorates. As the DO representative, the undersigned was asked to look into unique management training needs of the Operations Directorate as well as those seen to be common throughout the Agency.

2. The Terms of reference granted the Task Force essentially called for a polling of opinion among middle managers. This was done with full recognition of the fact that the resulting opinions of middle managers should be considered only as one factor in the decision process on management training for the future. An assumption that the average middle manager knows best what types and amounts of management training he should have is considered dubious.

3. Enclosed herewith is the Report of the Task Force to the Director of Training, with supporting detail from the four Directorates. In essence, the Task Force found receptivity among Agency managers to a more programmed development of rising managerial potential and recommends a segmented format of training: A core course would familiarize students with the major managerial approaches, emphasizing Management by Objectives, and would provide an awareness of available management training--internal and external--which the rising middle managers should have in mind for themselves and their assignees. To this core course would be added short seminars on topics of managerial concern as needed, intra-directorate and interdirectorate, The



Task Force notes that the success of the proposed management training program depends in large part on the active participation of Agency leadership in both articulating managerial philosophy and in assigning the right students to the training.

4. Highlights from the DO survey follow:

a. The DO can do a better job of identifying and developing managerial capabilities within its ranks; it must do so if it is to meet its operational responsibilities ahead. (Although beyond the parameters of this survey, considerable emphasis was given by DO middle and senior managers to management training under tutelage in the normal course of job assignments.)

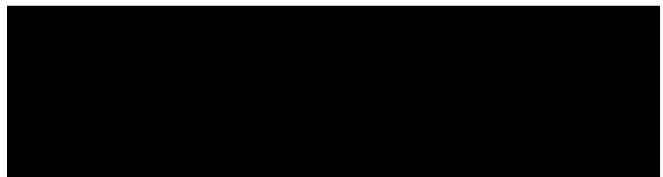
b. There is no discernible consensus among DO middle and senior managers as to content of desired Agency management training.

c. Knowledge of extant Agency training opportunities in supervision and management is remarkably thin among DO managers who not only might have profited themselves from such training but are in the command positions from which to guide the training of rising middle managers.

d. There is a wide area of managerial concept and technique common to all Agency Directorates, allowing for profitable participation by DO officers along with colleagues from other Directorates in Agency-wide management training.

e. There is a parochial area of DO management training that might well be met by institution of a counterpart course for chiefs and deputy chiefs of DO branches similar in many respects to the Chiefs of Station Seminar. ?

5. The undersigned would be pleased to discuss any aspect of the Task Force role and contribution, as desired.



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Operations Directorate Member  
Management Task Force

Enclosure:

Findings of the Management Task Force with attachments

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13 April 1973

MEMORANDUM FOR: Director of Training

SUBJECT : Report of the Management Task Force

1. The Management Task Force, formed 15 January at the request of the Director of Training and staffed through the cooperation of the 4 Deputy Directors, has completed its task. It has surveyed the opinions of middle managers on their training needs and in paragraph 4 presents its recommendations.
2. The Task Force proceeded on the following bases:
  - a. Officers at the GS 13-15 level who are supervisors of supervisors would be the main focus of the survey. Supergrades would be included but only as necessary to complete the survey of a Directorate. The level of the job, not the grade, determines who is a middle manager.
  - b. A single "course" was not a necessary outcome of the survey.
3. The Task Force surveyed opinion by questionnaire and by personal interview. A total of 320 questionnaires were sent out and 250, or 75%, were returned. Sixty-three interviews were conducted. The data obtained yields the following:
  - a. The middle manager as polled in the survey averages 48 years, GS 14-15+, and 20 years of service in the Agency. The exception is in the Directorate for Science and Technology where middle managers have fewer years of age and of service. A significant portion of the sample is looking toward retirement in the 1970's.

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b. Each Directorate has distinct functions, and middle managers have career identification with these functions. They are partial managers--operators, analysts, scientific specialists, and support specialists who have some managerial responsibilities.

c. Nevertheless, the Task Force found more uniformity of attitudes toward training than anticipated. Middle managers have a positive view of the value of training. They tend to believe, however, that many of the learnable elements of management are not necessarily directly teachable. They feel that the effectiveness of training is heavily dependent upon the managerial environment, including early identification of officers with managerial potential. They don't believe that simply throwing a training course at a management problem will make that problem go away.

d. The respondents generally desire some training, particularly if they are given more responsible positions, and believe their successors need more training than they do. Some expressed regret that they had not had more opportunity for training. Many see virtue in small seminars and in forums for discussion of problems common within Directorates and for improving peer relationships across Directorates. In any case, courses should be intense and practical. ✓

4. The Task Force recommends:

a. That the Office of Training establish a training program for middle managers.

(1) The program should be designed to familiarize the students with the various approaches to management, such as human relations, management science, and functional management. There should be emphasis on Management by Objective. ✓

(2) The program should examine practices currently employed in the Agency and explore ways to improve these practices. Agency executives should be called upon to explain what they expect of middle managers. ✓

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(3) Where possible, case studies used in the program should be based on Agency problems rather than business and industrial experience. Each Directorate should be requested to contribute useful case studies and speakers willing to speak from their own experiences. ✓

(4) In view of the varied needs of Directorates and of individual managers, consideration should be given to a format segmented in time. The main course or core segment should be designed to meet the common needs of new middle managers. Seminars, forums, and briefing sessions could be added as needed to the program to meet the special needs of other middle managers and graduates of the core segment. Subjects addressed could include mental health, alcoholism, drug addiction, and the new generation. The purpose of the segmented format is to provide as much flexibility as possible in terms of time and type of student attendance. ?

(5) A time period in the core segment should be used to familiarize the middle manager with management training available within and without the Agency. According to the survey, he does not always know what training is available.

(6) The attached Directorate reports give details on the varied training needs of middle managers. For instance, respondents to the questionnaire tended to want the management science approach for themselves and the human relations approach for their successors. All managers have an interest in career development and in learning more about computer applications, but opinion is divided on budgeting and records management.

b. That the Office of Training work out with the Directorates a procedure for selecting students for this training program.

(1) The selection procedure should insure that the individual middle manager receives management training at the appropriate time(s) in his career. The respondents to the questionnaire indicate that the most appropriate time is when the individual is about to assume or has just assumed middle management responsibility.

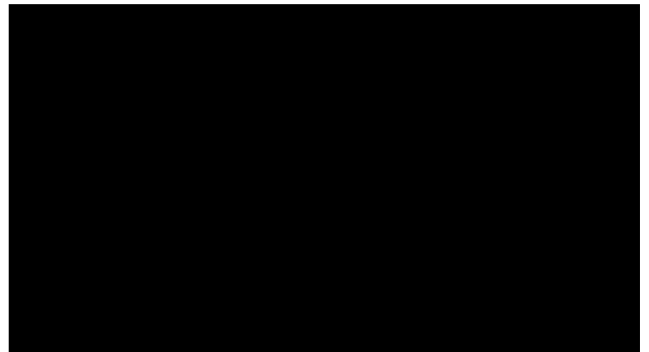
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(2) If this procedure is successful, the program can avoid the fate of the now defunct Advanced Management (Planning) course. This course was cancelled because too few could attend, not because too few wanted to attend. According to the questionnaire, there is still a demand for this course. The program should also avoid the opposite fate--surviving as a place to park the marginal and those between assignments.

5. To the extent that the program gains the active support of Agency executives in the selection of students and the articulation of managerial philosophy, it can be successful in contributing to the improvement of Agency management as a whole.

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Attachments:

Individual Directorate Reports (4)  
Questionnaire for Middle Managers (1)

Distribution:

0 + 2 - Adse  
1 - C/SUS  
1 - DC/SUS/MT  
4 - Task Force Members  
1 - Chrono

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QUESTIONNAIRE FOR MIDDLE MANAGERS

The Executive Director-Comptroller has asked the Office of Training to conduct a management training program for middle managers of the Agency. As a first step in developing such a program the Office of Training with the cooperation of the Deputy Directors has formed a Task Force composed of one representative from each of the four Directorates and under the chairmanship of an OTR officer. The mission of the Task Force is to identify the training needs of middle managers and to make recommendations to the Director of Training.

The Task Force is now soliciting your opinion on the subject of management training for you and your successors.

Return questionnaire by 26 February 1973: Management Task Force  
202 Chamber of Commerce Bldg.

Management Task Force representatives  
(Chairman)

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202 Chamber of Commerce Bldg.  
x2243

Name \_\_\_\_\_

Age	EOD	How many employees in your unit?	How many supervisors report to you?

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II. To the extent that "experience is the best teacher," how can the Agency insure that potential middle managers get the right experience? For example, do you favor rotational assignments for on-the-job managerial experience? Managerial 'internships'?

III. What specific training or managerial experience would you like to have as you look ahead to increased managerial responsibilities?

Additional comments regarding training may be placed on reverse side.

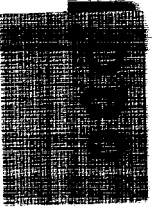
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IV. What is your opinion of existing internal and external training programs and how they relate to your current managerial responsibilities? From among the following courses, rate those which you have attended or with which you are familiar. To what extent are they (1) of Direct Managerial Benefit, or (2) of Indirect Managerial Benefit only, e.g., general orientation, familiarization, personal development?

Check (X) courses attended	(1) DIRECT MANAGERIAL BENEFIT			(2) INDIRECT MANAGERIAL BENEFIT		
	Much	Some	Little	Much	Some	Little
<u>Internal Courses</u>						
Managerial Grid (SMS (Grid))	M	S	L	M	S	L
Fundamentals of Supervision/Management (Management course)	M	S	L	M	S	L
Advanced Management Planning (AMP) (SMS (P))	M	S	L	M	S	L
Midcareer Course	M	S	L	M	S	L
Management Science for Intelligence	M	S	L	M	S	L
Other _____	M	S	L	M	S	L
<u>External Programs</u>						
Senior Service Schools (Indicate which school) _____	M	S	L	M	S	L
Program for Management Development (Harvard)	M	S	L	M	S	L
Career Education Awards Program (Formerly NIPA)	M	S	L	M	S	L
Executive Seminar Center Programs (CSC)	M	S	L	M	S	L
Foreign Affairs Executive Seminar	M	S	L	M	S	L
Other _____	M	S	L	M	S	L

Additional comments regarding existing courses may be placed on reverse side.

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Management Training for the Operations Directorate

The Directorate of Operations can do a better job of identifying and developing managerial capabilities within its ranks; it must do so if it is to meet its operational responsibilities ahead.

This is the overall view arising out of a survey of middle and senior management within the Directorate as part of an Agency-wide effort coordinated by the Office of Training in early 1973. The survey encompassed written responses from 83 middle managers and interviews with 10 senior managers within the Directorate. (A more detailed statement of the survey mission and its findings is found in the enclosure to this paper.) These middle and senior managers of the DO generally assert that the operationally-skilled and oriented manager will continue to be the model within the Directorate, but that the managerial dimension must be given more emphasis. The DO can no longer afford the conduct of major business by officers who are 90% operator and 10% manager. On the other hand, managerial capability alone cannot suffice in DO work; it is an extra dimension that must be measured in every officer early in the career and nurtured in its growth wherever feasible. Management concepts such as leadership and communications on the one hand and organization of work and resources on the other find

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some applicability even in handling agent case work. It is thus possible for the case officer to display managerial potential early in the career. It is likewise possible for supervisors and managers to identify this potential and begin to aid and test its development from early career stages.

The fitness report is the primary vehicle for identifying managerial talent, as well as operational capability, and it must be given fuller usage in this regard. More widespread training should be given to supervisors in the preparation of fitness reports, and more supervisors should be held accountable in their own fitness reports for shortcomings in the identification and handling of managerial potential.

Managerial potential should be nurtured through both structured training and assignment opportunities under management tutelage, the latter being far more significant than the former but also benefitting considerably from the former. More assignments to deputy positions should be made in the light of managerial training opportunities inherent in the deputy position. Management skills and techniques can be learned from such assignments either in the field or at Headquarters but the factors of size and complexity that tend to differentiate managerial problems and perspectives from those of first-line supervision are to be found more at Headquarters.

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The Operations Directorate does not have, and cannot afford to create, separate classes of managers and operators. Managerial decisions within the directorate must be grounded in operational judgements that can come only from operational experience. The development of an officer from an operator to an operational supervisor and thence to an operational manager is as much a matter of perspective as of technique. The latter can be taught but the former is acquired from experience whereby the officer's focus on the "how" gradually shifts to the "why" of goal-setting and evaluation. This is the mark of the extra-dimensional officer required for middle and senior management of the DO.

Management training can help develop officer potential for management, but it cannot create it. The product of management training is limited by both the caliber of the training and the caliber of those taking it. The directorate is the loser when decisions on management course enrollment are left to the enrollees or are made on the basis of availability rather than on needs of the service. Only by getting the right people into management training can the DO realize the desired managerial gain from the training investment.

External training can be useful for broadening of perspective and regenerating career drives, but managerial training for the DO should be internal for the most part.

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Outside experts can profitably be included within such training but the context should be that of CIA -- preferably DO -- management concerns. The officer student will usually get the most benefit from training which he recognizes as job-related. Closely akin to this is the need for management training to be given to officers who can look ahead to about ten more years in their career. (Most of the group questioned in this survey would not meet this criterion.) In many cases it would most appropriately come immediately following a field assignment and prior to assumption of responsibilities at Headquarters -- or at least prior to becoming "indispensable" in the new job. Some consideration should be given to instituting a counterpart to the [REDACTED] for officers moving into Headquarters branch chief and deputy chief positions. Courses should probably be no more than two weeks in length, that period being about the maximum affordable time away from Headquarters roles. 25X1A

As to substance for management training, both the middle managers and the senior managers responded with a diversity of view in the best tradition of a directorate that has long put store by diversity as a strength. The very term "management" means different things to different DO officers, many using it in its behavioral sense of leadership and communication while many others use it in the impersonal sense of organization of resources and the technology that

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can assist in such organization. Some use "management" to subsume "leadership" while others view "management" as a tool of "leadership." From this wide variation of meaning flows a similar difference of view as to the nature of the "management problem" within the DO and, hence, a wide difference in recommended emphasis in management training. Parenthetically, it should be noted that any difference of view that might have been expected between the DO operations officer and his colleague from TSD or ISD in regard to management training was not borne out in the survey.

Conclusions arising from this survey of DO opinion on management training are as follows:

- a. Interest in management training is fairly widespread in the DO, although,
- b. There is no discernible consensus as to content of desired Agency management training.
- c. Knowledge of extant Agency training opportunities in supervision and management is remarkably thin among DO managers who not only might have profited themselves from such training but are in the command positions from which to guide the training of rising managers.
- d. There is a wide area of managerial concept and technique common to all Agency Directorates,

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allowing for profitable participation by DO officers along with colleagues from other Directorates in Agency-wide management training.

e. There is a parochial area of DO management training that might well be met by institution of a counterpart course for chiefs and deputy chiefs of DO branches similar in many respects to the Chiefs of Station Seminar.

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Name \_\_\_\_\_

Age	EOD	How many employees in your unit?	How many supervisors report to you?

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Survey Profile

A total of 103 questionnaires were sent to Directorate of Operations officers understood to be holding positions of middle management in early 1973. "Middle management" was arbitrarily defined for this purpose as constituting officers of GS-13 through GS-15 who were supervisors of supervisors. Most of the 103 fell into this category, but a few did not, and others chose to disqualify themselves based on impending retirement or other considerations. Ninety of the 103 questionnaires were returned, of which 83 could be used for study. These 83 were composed of 56 from operating divisions (45) and staffs (11), and 27 from TSD (21) and ISD (6).

Information requested of the respondent on the first page yields the following profiles of middle managers in the DO: Within the operating divisions and staffs, the middle manager is about 47 (40 to 57) years of age, has been with the Agency 21 (11 to 26) years, is GS-14 or GS-15 (only 1 GS-13 responded), and is part of an organizational unit of about 20 (1 to 150) in which he supervises 3 - 4 supervisors. Within TSD-ISD, the middle manager is only one year younger than his operational colleague, namely 46 (39 to 58), and has the same service of 21 years (1 to 24 years), but he is part of a larger unit of about 36 (1 to 356) in which he supervises 5 supervisors.

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- I. From the list of managerial responsibilities below, select those areas in which you need training and those in which your successor will need training. Indicate the extent of the training required by checks in the two columns on the right. If the list is not complete as far as your job is concerned, please add as required.

## RESPONSIBILITIES

## YOUR TRAINING NEEDS    SUCCESSOR'S TRAINING NEEDS

Planning

Much    Some    Little

Much    Some    Little

Setting objective

Programming

Budgeting

Records management

Other

Organizing

Encouraging innovation

Coordinating

Allocating resources

Other

Staffing

Selecting personnel

Career management

Evaluating performance

Other

Directing

Delegating of authority

Motivating

Communicating

Leadership

Conference management

Scheduling of work

Other

Controlling

Developing performance standards

Measuring results (productivity)

Counseling

Disciplining

Contract management

Other

Analysis

Computer application

Operations research

Forecasting technique

Other

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## QUESTION I

This question offered more opportunity for statistical analysis than the other three but there are serious weaknesses in this data base for support of more than tentative conclusions and related recommendations. For example, the column heading "Successor's Training Needs" was misunderstood by a number of respondents who simply passed it by on the basis of not knowing who their successor might be. Likewise, there was an apparent difference of interpretation as to whether "Little" meant "none" or "a little bit." Also, we must assume that in any survey of this sort there are always extraneous factors influencing the responses such as self-imagery, the avoidance of admissions against interest, and patterned responses in test-taking. Unfortunately, the lack of vertical alignment of some answers also makes questionable the actual response to the question in some instances.

With these caveats in mind, certain observations can, however, be made from the data in hand. First, as might be expected, the middle managers of the Directorate of Operations (DO) recommend a good deal more training for those replacing them than they would desire for themselves at this point. There was no way to break down the responses into those new on the job and those who had been in place for some time, a factor that would certainly influence some of the responses. Nor was it feasible to break this

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down by age, grade, length of service, or level of position held. It was feasible, however, to divide the DO responses into two groups for comparison purposes, namely, those from TSD and ISD on the one hand, and those from the operating components and staffs of the DO on the other hand. Presumably, any difference of view within the DO would show up in this comparison between operators (artists?) and technicians.

Any difference to be found between these groups did not appear in the amounts of training needed by the respondents as compared with their successors. In fact, the following table shows an identical increase when the sum of each (Much-Some-Little) column was divided by the number of respondents (56 in Operations, 27 in TSD-ISD) and rounded off to the nearest whole number:

	<u>Operations</u>			<u>TSD-ISD</u>		
Successor needs	5	9	3	5	10	3
Own needs	2	6	7	2	7	7
Difference	+3	+3	-4	+3	+3	-4

Looking at the responses in more qualitative terms, the following table gives the selection frequency ranking (1 to 5, with 1 being highest) for the four groups, these top five selections covering 12 of the 24 responsibilities provided the respondents for consideration of training needs:

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<u>RESPONSIBILITY</u>	<u>Operations</u>		<u>TSD-ISD</u>	
	<u>OWN</u>	<u>SUCCESSOR</u>	<u>OWN</u>	<u>SUCCESSOR</u>
Computer application	1		2	
Budgeting	2		5	
Programming	3	1		
Career management	4	3	1	2
Measuring results (productivity)	5			
Evaluating performance		2		
Motivating		4		4
Selecting personnel		5		3
Leadership				1
Conference management			3	
Allocating resources			4	
Communicating				5

The only responsibility calling for training of respondent and successor alike in both the Operations and TSD-ISD groups was career management (although one must wonder how much tongue-in-cheek might have crept into the responses on this mother-love topic). However, a significant overlap extends into the areas of computer application and budgeting. Interestingly enough, the similarity of high rating on these two for the respondents themselves is found in a much lower rating given them for successors. Again, there is a tendency within both the Operations and

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the TSD-ISD groups to emphasize more of the human relations aspects of management in training recommended for their successors while focusing on the more organizational and technical aspects of management for themselves. This is not a marked tendency in the responses and should not weigh heavily in any recommendations, but it did emerge from both sets of responses.

In summary, the responses to this question clearly underscored the obvious, i.e. that officers about to assume a new position probably need more training than the incumbents now need -- or feel they need. They also indicate that attitudes toward management training are not significantly conditioned by the DO Officer's career concentration in the operational as contrasted with the technical and supportive aspects of DO work. They offer only very tentative guidelines, at best, as to what types of training should be provided to middle managers of the Agency.

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II. To the extent that "experience is the best teacher," how can the Agency insure that potential middle managers get the right experience? For example, do you favor rotational assignments for on-the-job managerial experience? Managerial 'internships'?

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## QUESTION II

This was designed as a control question to insure that the respondents gave proper attention to the main thrust of the questionnaire. It achieved this purpose reasonably well -- or wasn't required for the purpose -- in view of the thought and care that generally went into the responses. However, the narrative license given the respondents yielded a product that does not lend itself to statistical analysis but does offer useful insights of a more general nature.

The responses from Directorate of Operations (DO) officers were highly colored by ambiguities of "rotational assignments." Many understood this to mean the normal DO career movement between field and Headquarters while others looked upon it more in terms of varying one's experience in different operational settings. Some viewed the pros and cons of movement within the division where home-based, or between that division and other area divisions, but few responded in terms of rotational assignments outside the DO. The most significant generalization arising out of the responses on rotational assignments is an emphasis on increasing responsibility with each assignment during the career. Several notable failures were mentioned in personal experience with rotational assignments.

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Probably the most general concern that was stated or implied in answers to this question by DO officers was that DO operational units must continue to be managed by operationally-experienced personnel. The goal is to couple this experience with managerial talent. A significant number emphasized the need to identify that managerial talent early in the career so that effective planning could enter into assignments and career development. Several suggested that this identification should include testing of managerial aptitude at career outset; others would have the DO rely more on performance evaluation of early assignments for identification of aptitude and skills. Implied in many of these observations, and explicit in some, was the belief that "managers are born, not made." Only by so identifying managerial potential, can the DO consciously plan to develop it through training and job assignments.

A vein of strong feeling runs through the DO responses that some formal training should be coupled with managerial experience and on-the-job-training (OJT) in the development of DO middle managers. Some respondents focus in this regard on a general broadening of perspective, others on particular skills or techniques of management, while some advocate the Advanced Operations Course as the best preparation for increased managerial responsibility within the DO. In any case, there are few purists who would

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adhere so closely to the "experience is the best teacher" view that they would eschew all formal training in preparation for management. On the other hand only one respondent suggested that formal training be prerequisite to managerial assignments.

"Managerial internships" were even less understood by DO respondents than were "rotational assignments." This assignment concept was ignored or overlooked by many respondents, with a significant number of others indicating skepticism if not outright opposition. Two key problems were seen by most critics. First, the work experience for the intern, presumably there for a short period to learn more than he is to contribute, would have a contrived and unreal character in which the intern would be shielded from the pressures and ramifications of decision-making. Secondly, the critics expressed concern over the morale and productivity of an operational unit clearly used as a managerial training experience in the career advancement of an Agency elitist.

Those officers who responded more positively to the managerial internship concept were for the most part those who saw it as, in effect, already being practiced by DO assignments to deputy positions within [REDACTED] and Headquarters [REDACTED] Five officers

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commented on the need to delegate authority and responsibility to these potential middle managers in order to make their experience truly profitable. In this regard, two officers recommended that senior officers be rated on their ability to delegate supervisory responsibilities, while four officers reiterated the importance of adequate evaluation in selecting and retaining those who should manage.

Three officers commented on the value of experience gained through service on personnel evaluation panels of the DO, stating or implying that this service was one of the better managerial exposures one could obtain for career development in the DO. A like number commented on the value of other special assignments, short tours, and service on task forces in exposing officers to practical managerial experience. There were a few suggestions that more positions of the executive officer type be created whereby more officers might be given opportunity to study first-hand the operational and organizational leadership of capable managers. Two respondents extended their remarks to urge that assignments to managerial positions be made more frequently from the deputy position,

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that is, promoting the deputy to the chief's position after he has had sufficient time to learn the position and develop certain managerial practices and techniques.

The general proposal for tutelage and understudy, whether through rotational assignments or otherwise, was supported with several different statements of rationale. One-eighth of those responding from the Operational Components commented specifically on the exposure to managerial styles and techniques, while one-seventh commented on the Agency's opportunity to test the officer under different managers and circumstances. Only a slightly smaller number observed generally on the broadening of background through change of assignment, while two officers stressed the stimulation of change; one pointedly recommended movement between positions in order to avoid going stale. One respondent recommended broader usage of directed assignments, presumably meaning field assignments, while another respondent observed that management problems within DO work are to be found principally at Headquarters, not in the field.

In summary, this question was loosely structured for a purpose but evoked rather broad concern for identifying managerial talent and providing that talent with opportunities for stimulation, growth and development, including formal training.

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III. What specific training or managerial experience would you like to have as you look ahead to increased managerial responsibilities?

Additional comments regarding training may be placed on reverse side.




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QUESTION III

This question was intended to appeal to those ambitious officers who might not feel any great need for training in their current positions but who might look more favorably on training in their further career development. Ten of the sample (83) took themselves out of this category by direct reference to retirement planning (7), by commenting on the "twilight" portion of their career (2), or by reflecting philosophically on the career (1). To the extent that these ten officers commented on managerial training in answer to this question, they emphasized a need for managerial training to be given earlier rather than later in one's career.

The responses of the 73 officers who, presumably, are still looking ahead in their careers included a total of 138 references to various kinds of training (124) and experience (14). Five of the 14 comments on experience simply indicated a readiness and desire to be assigned as  in one case). The other nine comments on experience mentioned rotational tours, promotion panels, ad hoc committees on such matters as policy or personnel, and assignments offering general opportunities for increased responsibility.

25X1C

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The 124 comments bearing on the more structured type of training included 26 explicit references to OTR courses as follows: Managerial Grid - 7; Fundamentals of Supervision and Management - 5; Mid-Career - 4; Advanced Management (Planning) - 4; Senior Seminar - 4; and the [REDACTED] - 2. Sixteen officers stated a desire for what might be classed as prestige training opportunities, e.g. the senior service schools, the State Department Senior Seminar and the Federal Executive Institute. Ten respondents explicitly desire external training in management.

Twenty-four of the 73 respondents, or one-third of the sample, expressed a desire for advanced or senior management training, otherwise unspecified. Thirty-two specific mentions were made of managerial areas in which training is desired. Fourteen of these clearly fall into the behavioral category (e.g. handling people, personnel evaluation, sensitivity training); 18 were more in the organizational and technical categories (e.g. planning, programming, budgetting, decision-making, systems analysis, forecasting, measuring results, computer applications), although such items as "effective use of resources" would spill over into the behavioral as well. None of the organizational and technical areas was noted with a frequency worthy of highlighting.

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In summary, the responses to this question indicate general favor among DO middle managers for management training in connection with their own career advancement.

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IV. What is your opinion of existing internal and external training programs and how they relate to your current managerial responsibilities? From among the following courses, rate those which you have attended or with which you are familiar. To what extent are they (1) of Direct Managerial Benefit, or (2) of Indirect Managerial Benefit only, e.g., general orientation, familiarization, personal development?

Check (X) courses attended	(1) DIRECT MANAGERIAL BENEFIT			(2) INDIRECT MANAGERIAL BENEFIT		
	Much	Some	Little	Much	Some	Little
<u>Internal Courses</u>						
Managerial Grid (SMS (Grid))	M	S	L	M	S	L
Fundamentals of Supervision/Management (Management course)	M	S	L	M	S	L
Advanced Management Planning (AMP) (SMS (P))	M	S	L	M	S	L
Midcareer Course	M	S	L	M	S	L
Management Science for Intelligence	M	S	L	M	S	L
Other _____	M	S	L	M	S	L
<u>External Programs</u>						
Senior Service Schools (Indicate which school) _____	M	S	L	M	S	L
Program for Management Development (Harvard)	M	S	L	M	S	L
Career Education Awards Program (Formerly NIPA)	M	S	L	M	S	L
Executive Seminar Center Programs (CSC)	M	S	L	M	S	L
Foreign Affairs Executive Seminar	M	S	L	M	S	L
Other _____	M	S	L	M	S	L

Additional comments regarding existing courses may be placed on reverse side.

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## QUESTION IV

This question was designed to obtain an evaluation of management training opportunities, internal and external, as developed out of first-hand knowledge or from the experience of others. Recognizing that many of these opportunities transcend any normal definition of management training in many cases, the respondents were asked to denote indirect as well as direct managerial benefit derivable from the training experience.

The responses on external training opportunities were so scattered and fragmentary as to provide no satisfactory basis for analysis. Strangely enough, the reactions to the prestige training opportunities, while weighted toward managerial benefit, viewed the direct managerial benefits as either MUCH or LITTLE; the indirect managerial benefits were largely concentrated in the SOME column. The significance of this is difficult to assess.

Only four of the courses, all internal offerings, were noted with sufficient frequency for analysis: Managerial Grid, Fundamentals of Supervision and Management, Advanced Management (Planning), and the Mid-Career Course. A fifth, Management Science for Intelligence, was seen to be of SOME direct benefit by 3, and of SOME indirect benefit by 4 but these numbers probably reflect more the lack of

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knowledge about this course among middle managers than the benefits to be gained from it.

The Managerial Grid and the Mid-Career courses obtained the most response among the four -- 52 officers on the former and 56 officers on the latter. The other two courses, i.e. Fundamentals of Supervision and Management (FSM) and Advanced Management (Planning) (AMP), had responses from 25 and 28 respectively -- approximately half that of the Grid and Mid-Career. However, of those responding on the FSM and AMP, approximately 2/3 in each case gave first-hand reactions as a result of having taken the courses whereas only half of the respondents had taken the Grid and the Mid-Career.

The framework of the question gave the respondent opportunity to indicate managerial benefit ranging from much direct to little indirect, including combinations of direct and indirect. If we assume that training should ideally be directly applicable to the participant's work situation, it is satisfying to note that almost all respondents noted some degree of direct managerial benefit from the Grid, FSM and AMP. These three courses are designed as managerial training in a somewhat narrower sense of management than applicable to the Mid-Career where 79% still found direct managerial benefit.

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A similar pattern emerges from the responses on the four courses when we look at the degree of direct benefit obtained. Recognizing that MUCH and SOME are both positive degrees while LITTLE might have been interpreted as either very little or none, we find that 88% of the respondents found MUCH-SOME direct managerial benefit in the Grid, 90% found MUCH-SOME in the FSM, 71% found MUCH-SOME in the AMP, and 64% found MUCH-SOME in the Mid-Career. Indirect managerial benefit is subject to widely different interpretations but very few officers chose this category for exclusive response on any of the four courses. A clear to heavy majority of those noting indirect managerial benefits from the Grid, FSM and AMP noted that degree as SOME. The Mid-Career pattern of indirect benefit shows 48% of the respondents using MUCH and 43% using SOME, that is, a spread over the two positive areas rather than the concentration in SOME seen for the other three courses.

A good summary of the reactions on this question is found in the words of one of the respondents: "I think the Agency has excellent courses in supervision and management, e.g. Managerial Grid, Supervision, Mid-Career and Advanced Management Planning. Something was lost when Advanced Management Planning was dropped. I suggest it be reactivated with added emphasis on management analysis."

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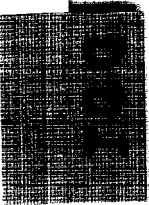
(A postscript is necessary on this question, although not related directly to the mission of the Task Force. Those questioned were all middle managers with responsibility for the training of their direct subordinates and a larger number of personnel supervised by those subordinates. Yet 31 of 83 (37%) gave no response on the Grid; 58 (69%) gave none on the FSM; 55 (66%) gave none on the AMP; and 27 (33%) gave none on the Mid-Career. Twelve of the 83 (14%) explicitly stated that their knowledge of these courses was so limited or lacking entirely that they could not respond to the question.)

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MANAGEMENT TASK FORCE REPORT: DDI SECTION

STATINTL

1. We polled a large cross section of DDI middle management by means of a questionnaire and follow-up interviews. The questionnaire was sent to 59 officers--primarily division chiefs--a sample that included most second echelon supervisors in the directorate. The response was quite satisfactory; answers were received from 43 individuals (73% of the sample). In nearly every case, the answers were complete and thoughtful. Information gleaned from follow-up interviews was very much in line with the views expressed in the questionnaires--those interviewed had little to add to what had already been said in one way or another in the questionnaires.

2. The average respondent is 49 years old and has been with the Agency for nearly 20 years. He manages a unit of 45 - 50 employees with the help of four subordinate first-line supervisors. His grade is GS-15. 15. Although the grade range for middle managers was initially assumed to be GS-13 through GS-15, we soon recognized that if we also held to our definition of middle management as "supervisors of first-line supervisors," any such limitation would give a badly distorted picture of DDI opinion. OBG, OCI, OER, and OSR would have gone almost entirely unrepresented. We therefore ignored

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grade limitations and sent the questionnaire to 20 persons in grade 16 and above and to 39 in grade 15 and below.

3. The extent of formal management training already received by individuals in the sample varies widely. According to their training records, one in ten had had no management training, either within the Agency or outside. On the other hand, nearly 85% have attended OTR courses related to management, although some of these courses bear only tangentially on specific problems of middle managers (e. g., the Grid, attended by one fifth of the sample, and the Midcareer Course, attended by one third of the sample). About 60% have attended OTR courses specifically designed as management training vehicles, such as Advanced Management (Planning) and the Senior Management Seminar. About 5% have not attended management-related courses offered by the Agency, but have taken such courses elsewhere-- principally those given by the Civil Service Commission. (More than a third of those polled have taken CSC management courses, generally in addition to Agency courses).

The Middle Managers' View of Training

4. DDI middle managers are receptive to management training, and most can point to general areas in which they (or, more often, their successors) could use instruction. Their support is qualified,

however, by the feeling that formal training should be viewed in the larger context of improving Agency management as a whole. Selecting the right people for managerial positions at all levels, giving them experience in varied assignments, and monitoring their performance to ensure that those unable to lead effectively are returned to non-supervisory positions are all part of the same problem. Formal training has a role to play, but much can be done informally within offices and directorates to improve the tone of Agency management.

5. In an effort to determine specific training needs, we included in our questionnaire a list of 24 topics, asking that the respondent indicate for each topic whether he--and his successor when he leaves--needed "much," "some," or "little" training. We had grouped the topics into six broad management functions: Planning, organizing, staffing, directing, controlling, and analysis. Most of the answers disregarded these groupings, however, and weighed each of the two dozen items on its own merits. In so doing, they may have attached unintended meanings to a few items. Nevertheless, when the 24 items are ranked in order of preference some patterns are apparent.

6. Not surprisingly, middle managers think their hypothetical successors need much more training than they themselves. Moreover, there is a reasonably clear pattern in the ranking of subjects to which

they think their successors should be exposed. Heading the list are items that could be broadly classed as human relations topics: motivating, communicating, career management, leadership, selecting personnel, counseling, and delegating authority. A lower priority is assigned to items that relate more to the techniques of management than to interpersonal relationships. These include, in descending order of importance, allocating resources, programming, developing performance standards, coordination, measuring results, forecasting techniques, and scheduling work. Consigned to the bottom of the list are budgeting, operations research, records management, and contract management.

7. When the respondents turn to evaluating their own needs, the pattern is less clear. Communicating appears very near the top of the list, but in general the managers seem to be saying that they need far less coverage of human relations topics, particularly career management, selecting personnel, leadership, and delegating authority. They tended to put "management science" topics nearer the top of the list--though in no subject did they feel they needed as much training as their successor. Budgeting, contract management, and records management again appear at the bottom of the list, joined in this case by coordination.

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8. Computer application receives high priority in both lists. It is in fourth place in the successors' list, surrounded by human relations topics and well ahead of those dealing with "management science." It ranks first in the middle managers' own priority list.

9. In another portion of the questionnaire we asked for suggestions as to how to improve the preparation of managers other than by formal training. Although the responses were couched in generalities, they reinforced our impression that efforts to improve management should involve an integrated approach that includes careful selection of personnel, the assignment of tasks designed to develop and test leadership potential, the placement of personnel in jobs that give them an opportunity to understudy and act for successful managers, and rotational assignments--all these experiences to be supplemented by formal training.

10. Rotational assignments, (which were cited as an example in the questionnaire itself) drew heaviest comment; nearly all respondents had something to say on the subject. Only three were negative. The rest were about evenly divided between those who favored an increase in rotational assignments--both within and among directorates-- and those who favored rotation in principle, but with certain reservations. Some thought rotation is a good idea "where practical"; others stipulated that the period of assignment should be long enough

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(a year or two) to give the individual a real stake in the job. Some, particularly in technical fields, thought that rotation, while desirable, should be limited to specific occupational specialities. About a fifth of the answers mentioned "internships," almost always in negative terms. Those opposing internships thought they were artificial and of too short duration to be meaningful.

11. A significant number of respondents--about one in five--recommended some regular system of seminars or executive sessions to stimulate a broader exchange of views among agency managers. Some had in mind sessions in which middle managers could discuss the Agency's objectives and philosophy with officials at the executive level. Others wanted freewheeling talks with officers in other components and directorates.

### Conclusions

12. DDI managers' assessments of their own and their successors' needs indicate that a middle management training program should lean heavily on the social interactive aspects of management and supervision. DDI second echelon managers are primarily supervisors of people. This is, of course, the aspect of managing that is hardest to teach, and that in some senses it may be unteachable. Nevertheless, much could be done through seminars, group study, and perhaps sessions with

competent and respected outside experts, to heighten the participant's awareness of responsiveness to the psychological dimensions of his management problem. At a minimum, it should serve as an introduction to the sizable body of useful literature on the subject.

13. A program should acquaint participants with the various schools of management, including an examination of the merits and disadvantages of each. It should not try to turn out the complete management expert. Officers whose work requires training in greater depth should be encouraged to attend one of the several intensive external management programs.

14. Computer application should be covered at non-technical level to familiarize participants with the possibilities and limitations of ADP. If this is not feasible, there should be some provision for enrolling interested individuals in an appropriate computer course elsewhere.

15. The criteria for attendance should be flexible enough to permit the enrollment not only of middle managers and their deputies, but also of first-line supervisors who seem likely to move up the ladder to middle management positions. The age and length of service of incumbent middle managers suggest that many will be retiring in the next five to ten years. Moreover, given the fact that some have already



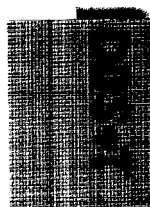
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had management training, the pool may not be large enough to sustain a course for many runnings. On the other hand, we would expect to find among first-line supervisors a substantial reservoir of talented individuals who will be assuming greater responsibilities in the near future. These are the officers who might be most receptive to the program, and there is every advantage in preparing them for middle-management roles before they arrive on the job.

16. The grade level GS-13 through GS-15 is appropriate, assuming the flexibility on supervisory level recommended above. Insisting that participants be second-echelon supervisors but not supergrades would virtually rule out participation by several DDI offices. For that matter, there will be cases where individual supergrades should be invited--indeed urged--to attend.

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Survey of Management Training Needs -- DDS&T

STATINTL

[REDACTED]  
OSI/PSED/CB  
X7911

Introduction

This report presents findings on S&T middle-manager training needs obtained through a survey conducted by an Agency Task Force under the Office of Training. The study began in late January and by 15 April an overall Agency report is to be prepared. Principal guidance was provided by [REDACTED] the Task Force Chairman. Other members of the Office of Training, the Board of Visitors for Training and many others also advised the Task Force.

STATINTL

Procedure

The middle-manager is defined as a manager of working-level supervisors, i.e., the Division Chief and his Deputy. In some offices, such as ORD and OSA, the Division Chief is really a first-line supervisor, for he has no branches reporting to him. Yet, these chiefs were included in this study because of their rank. The study was extended to include a representative sample [REDACTED] Several Office Directors were also interviewed but only to gain their views on the training needs of their Division Chiefs. 25X1C

The total DDS&T middle manager population includes 25X1C  
28 Division Chiefs and 17 Deputy Chiefs -- not all  
Divisions have deputies. [REDACTED]

25X1C

[REDACTED] The average age 25X1C  
of the Division Chief is about 48 years, the Deputy  
Chief, about 42 and the [REDACTED] about 36. The  
average length of Agency service is 12, 11 and 7 years,  
respectively.

The Questionnaire. The Task Force prepared a questionnaire  
as a means for quickly surveying the entire Agency  
population of middle-managers. It was designed to elicit  
background information, interests and opinions relating to  
management training; it was not designed to pin point Agency's  
management problems, per se.

The DDS&T response to the questionnaire was about 64%,  
or 39 of the 61 questionnaires sent out. The returns 25X1C  
include 18 Division Chiefs, 10 Deputy Chiefs and 11 [REDACTED]  
Chiefs.

Interviews. The questionnaire provided a basis for  
selecting individuals for interview. The interviews  
expanded somewhat the size of the sample and improved its  
representativeness. Also gained was some appreciation for

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the attitudes of those who did not respond to the questionnaire. Altogether, 19 interviews were conducted which included 7 Division Chiefs, 5 Deputy Chiefs, 4 analysts, and 3 Office Directors.

Quality of Data. The questionnaire proved useful in gathering the desired information; the reply percentage was high and most respondents answered articulately and candidly, though some of the data proved ambiguous and difficult to quantify. Care was taken to provide a reasonably representative sample and to minimize biases that could affect the results. The responses of the middle-managers appear free from "halo effects;" that is, the inclination to provide what they may believe to be the desired answer. The interview data is consistent with the questionnaire data.

To aid in the analysis, a considerable amount of background information, such as past training, was gathered from other sources.

### Findings

Broad Training Needs. Although the Division Chief is very articulate and interested in training as an important management function, he views his own formal training needs in management as minimal. His Deputy, being

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younger and not as close to retirement, senses a somewhat greater need for management training for himself. The Chief and his Deputy believe that they have gained their best training through on-the-job experience, attained through government agency and industrial assignments. Some Chiefs have already had what they believe to be an adequate amount of general traditional management course work, yet he is likely to be interested in attending the prestige management training programs given by universities and the Government. He expects his successor to be similarly prepared for the job and to have had broad management training. He favors early identification and development of managerial talent through progressive rotation assignments and increasing opportunities for responsibility. He is often doubtful that management careers can be planned and recognizes that opportunities for gaining experience are limited.

He favors internships, but only in so far as they provide opportunity for assuming greater responsibility and participation in decision making under specially competent managers. Many internship experiences appear to have been unsuccessful because of poor management.

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The Division Chief relies heavily on the existing natural selection process for good managers and not on training. Indeed, he distrusts training as a way of selecting or of "making" managers. The Chief tends to stress common sense and technical competence over management knowledge, though he appreciates the value of the latter.

The S&T manager has a conservative view of the role of general courses in management training. For him they are likely to be too theoretical and impractical. The general courses should be given early in one's career and at the beginning of management assignments, and above all should not conflict greatly with the pursuit of office work. When interviewed, he is not likely to admit freely to his own personal management problems, but he is willing to talk, in general, on problem areas where training may apply. Generally, he feels that both Agency and external management training have been of value to him.

He is especially interested in obtaining better orientation to Agency problems, to his role in the government and to world affairs generally. Hence, his frequent

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expressions of interest in the executive seminar courses of OT and in external training to broaden his horizons. The executive management training programs at Harvard, Brookings Institute, Civil Service Commission, and other similar programs are highly regarded.

The Division Chief and Deputy Chief average between 1 and 2 management courses taken from the Office of Training and between 1 and 2 external courses in management. They are about equally trained in management. The most frequent Agency course has been the Management Grid course and the Advanced or Senior Management Seminar or some earlier Agency management courses. External training most often includes attendance at one of the management seminars provided by the Civil Service Commission or the USDA graduate school. About 15 percent have attended courses provided by the Brookings Institute or by various college management programs. About the same percent have attended the senior service schools such as the Industrial College of the Armed Forces. The Division Chiefs of some offices are professionally trained in management, and some of these are functioning more as management specialists than as middle-managers. A few appear to have had no management training at all.



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Many individuals have had one or more special courses in management, for example, R&D contracts and performance appraisal. Much of the Chief's management training is old, given 5 to 10 years ago or longer.

Individual Differences. Most believe that some form of management training would be useful, provided it is tuned to their own real problems. The specific needs of Division Chiefs appear to vary widely, mainly because of differences in experience and training and the differing functions of their Divisions and Offices -- to say nothing of the differences among Directorates.

The intelligence production offices such as OSI and FMSAC are interested, though cautiously, in the management sciences such as new analytical techniques and information systems in management, systems approaches and forecasting techniques. The technical offices such as ORD and OEL, while also interested in some aspects of management science, appear more interested in courses in advanced contract management and special courses for the management of engineers and technical projects. The OCS and OSA have special managerial and support functions, such as computer programming which are reflected somewhat in their management training needs. For example, some of

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the Chiefs in OSA function more as management specialists than as middle-managers. Some of these managers are very well trained in their management functions.

The major common denominators to all of the Directorate's training needs are the manager's interest in defining objectives, improving office communications, the behavioral aspects of management, standards and performance evaluation, and career management. The special problem of managing scientific and technical personnel is probably the quintessential difference that distinguishes the training needs of this Directorate.

#### Areas of Training Interest

The expressions of training interest when taken collectively suggest the continued need for across-the-board training in management, at least early in the manager's career. A number of special areas seem of particular interest to the manager, which he tends to think may be best satisfied by short seminars. While some short courses are already available in contracting, performance appraisal and ADP, other specific topics may require similar attention.

Planning and Decision Making. The manager senses a need for better understanding of Agency processes for planning,

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decision making, budgeting and coordination and his role in these processes. He is interested in the objectives of the Agency and the process of setting them and in how to manage accordingly. He wants to understand better modern planning techniques, but skeptical of some, such as the PERT system when applied to his own programs. He has an interest in how to plan for and manage unusual or crisis situations. Training probably can continue to help in these areas either through the Advanced Management Planning Course or through special courses.

Behavioral Sciences and Career Guidance Aspects of Management.

A keen interest exists in such topics as motivation, leadership, values, interpersonal relationships, self-appraisal, disciplining, employee guidance, drug abuse, youth culture and other subjects in the management psychology field. These interests were generally strong throughout. Very few managers have had recent formal training in the behavioral sciences, even as they may apply directly to management. A definite training need exists in this area for the Division Chief and the subject lends itself easily to training.

Career management problems exist throughout the Divisions, but the practicality of career planning programs

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is often questioned, because of the limited opportunities for advancement to management positions. The importance of self-reliant initiative in career development is occasionally mentioned, others feel that more responsible attention should be given to career planning by the Offices, perhaps through employee counseling, more rotations and opportunities for assuming responsibility. More understanding of employee needs and aspirations and related Agency policies and practices seems to be needed by managers. Training may have an important role in any such management program.

Management Sciences. Interest in the management science fields is strong. Among the subjects mentioned are systems approaches to management, estimating and forecasting techniques, problem solving and decision making. Operations research, however, has acquired a bad name. Some Chiefs expressed doubt that a useful short course could be devised in management science by the Agency. This kind of training is possibly more suitable when given externally at universities under highly competent instructors. Yet, some of the experience gained by some Offices in technological forecasting, in estimating and planning techniques may be a basis for short internal seminars.

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A significant number of managers are interested in ways of introducing new ideas, new techniques or technology into their operations. Indeed, the missions of one or two offices (e.g., ORD) are partly addressed to this problem. The introduction of new information systems, new analytical tools, and forecasting techniques are of high interest to some managers. The subject is probably one that does not lend itself easily to training, though a growing body of research on managing for innovation exists in industry. The Agency, itself, has some experience in this upon which to draw. Perhaps more of our managers should be experts in how to introduce new technology into Agency operations.

Other Specific Interests. A number of managers stressed the problem of setting standards and evaluating performance, the need for advanced training in contract supervision stressing industrial practices in managing government contracts, the need for more opportunities for self-appraisal such as the Grid program, and the need for more orientation to the management problems of the Agency and throughout the intelligence community. Other managers stressed the importance of improving communication skills at all levels.

Training Methods. Some managers have strong preferences for the manner in which training is conducted. The need for intensive demanding courses is sometimes stressed. Tutorial approaches, case studies, research projects, team work and exercises requiring much give - and - take, are frequently suggested. Formal lectures on theory, while considered useful, should be balanced with individual participation. Emphasis is placed on real practical problems.

Some feel that management classes should have a variety of students from all of the Directorates and from other agencies, as is already the case for some courses. Others feel that classes, depending upon the subject matter, should be homogeneous, sharing common problems and clearances. Little interest is shown in courses extending beyond 3 to 4 weeks, except for attendance at the prestige schools such as Harvard and the National Service schools.

Recommendations

An advanced general course in management should again be made available for all managers preferably early in their development or at the beginning of new assignments. For this purpose, the Advanced Management

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Course (AMP) should be reinstated and modified in the light of current Agency problems. The Grid course should be continued and attendance by all managers encouraged.

Introduce a program of special management seminars designed to meet the specific needs of the Chiefs and the various offices. These seminars should concentrate on such subjects as Agency objectives and planning and the decision making process in the Agency, especially as it relates to the Offices. The behavioral sciences and career guidance aspects of management are important problem areas of this Agency where training is strongly recommended. Managing innovations and other areas of management science are believed to be important enough for the Agency to encourage more external training.

Continue the broad orientation courses such as the world affairs and intelligence seminars for all chiefs.

Attention should be given to improving methods of instruction so as to stress participation in practical Agency problems and to make greater work demands upon the manager students.

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**ROUTING AND RECORD SHEET**

OP-800

SUBJECT: (Optional)

Findings of the Management Task Force

FROM: 25X1A



EXTENSION

NO.

1455

DATE

17 April 1973

TO: (Officer designation, room number, and building)

DATE

RECEIVED

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OFFICER'S INITIALS

COMMENTS (Number each comment to show from whom to whom. Draw a line across column after each comment.)

1. DC/DDO/PERS 17 APR 1973 ✓

2. DDO/TRO 18/4 18/4 TTB

4. C/OPSER 19 APR 1973 Jm

4 to 9:  
I assume D/OTR will present his recommendations to the MGT Committee.

8. DDO ✓

9. DDO/TRO Done. TTB

10. - PLS see me - Jm

11. For it, should not a course of the

12. "night school" variety be developed, i.e. home-

13. work reading followed by lecture and

14. seminars, about once a week at the end

15. otherwise this looks fine - WFC