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S-E-C-R-E-T

CENTRAL INTELLIGENCE AGENCY

OFFICE OF CENTRAL REFERENCE

INFORMATION CENTER | TASK TEAM REPORT NO. 11 | TTR/11

17 April 1958

MEMORANDUM FOR: Assistant Director, Central Reference

SUBJECT : Final Report on the Single Information Center Concept, Task Team No. 11.

25X1

1. Membership.

Task Team No. 11 consisted of the following members:

Walter J. Moberg, Chairman	ONE, on assignment as Production Advisor to St/FM/RR
	Chief, Fundamental Science Division, OSI
	Chief, Plans Staff, OCI
	Chief, Satellites Branch, Analysis Division, ORR
	Chief, Analysis Branch, Document Division, OCR

2. Method of Task Team Operation.

The task team set up a plan of operation shortly after its creation which encompassed the following:

a. Definition of the Problem. - A careful study of the consultants' report for an understanding of all of the findings and recommendations relative to the concept of a single information center. In this study the group tried to distinguish between the "central reference" concept as applied to OCR as a whole and the "single information center" within OCR.

b. Orientation of the Task Team. - The task team was briefed in some detail in the Library, IR, BR, GR, DD, FDD, and the Map Library.

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c. Investigation of Present Information Procedures. - Sub-committees were then assigned to visit and study in detail the information units or reference activities of the Library (Reference, Circulation, and Acquisition Branches), IR, BR, GR, DD, and the Liaison Division. Each of these sub-committees followed a uniform plan of investigation and reporting agreed on in advance by the task team as a whole. Summaries of these sub-committee reports and also reports of task team visits to FDD and the Map Library are found in Appendix A.

This investigation, considered by the task team to be its major effort, was focussed on a determination of the feasibility of providing the services of each unit on a centralized basis.

d. Investigation of Customer Needs and Interests. - This investigation was based largely on a questionnaire which was prepared in conjunction with the task teams studying the Intellofax and the Reference Branch. Returns from 421 analysts in the DDI area outside OCR have been received and analyzed. The purpose of this questionnaire, as it applies to the problems of this team, was to obtain information regarding the use customer analysts make of various reference facilities, to determine how these facilities are serving the needs of analysts, and to seek some indication of ways in which the reference services may be improved.

e. Analysis of the Dimensions of the Information Function. - In order to understand the physical dimensions of the units performing or to perform an information function it was necessary to investigate the present space and personnel allocations and the probable requirements under a modified organization in the new building or in a pilot operation. The team was briefed on the space allocations in the new building and gathered data for requirements.

Information was obtained on the volume and nature of requests for information being handled at present in all of the reference areas in order to assess the magnitude of the operation that the consultants wish to centralize.

f. Consideration of the Comparability of OCR and other Libraries. The task team knew of no other intelligence library comparable in its scope and complexity with OCR which it could use as a basis for evaluating OCR's information service. It did consider at some length, however, the extent to which criteria for evaluating the reference functions of conventional libraries may be applied to an intelligence reference service. Although an on-the-spot study of other libraries was tentatively planned, this was not carried through since the pooled experience of the members represented a rather wide acquaintance with library operations.

g. Evaluation of the Data. - The individual members of the task team reported on the visits noted above and also prepared separate studies as needed on questions that arose from time to time. The task team as a whole received and evaluated all of the data.

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3. Recommendations *

a. Administrative Integration of OCR Reference Services. - In order to reflect the essential unity of the various intelligence collections in OCR and in order to achieve greater efficiency and probably economy of operation, it is recommended that careful study be given to the possibility of effecting, as soon as possible, an administrative integration of the Library and the registers under a single administrator responsible only for reference services. (A delineation of the form such a reorganization should take is beyond the area of study assigned to this task team.)
(p. TTR/11-24. See also pp. TTR/11-13, 14.)

b. Establishment of a Central Information Unit.

It is recommended

(1) that, in lieu of the single information unit recommended by the consultants, a central information unit be established within the Library, using the present Reference Branch as a nucleus. This unit should be clearly identified as the place where (a) initial contacts for OCR reference service may be made; (b) information will be available regarding the capabilities of other OCR reference facilities; (c) short-term inquiries of a general reference nature may be answered by the use of orthodox library tools; (d) basic reference materials will be available; (e) bibliographies (including requests for Intellofax runs) will be prepared; and (f) the other reference functions now performed in the Library will be available.
(p. TTR/11-24. See also pp. TTR/11-12, 13, 15, 16, 19-23.)

(2) that the reference functions now being performed by the Circulation Branch be transferred to this unit.
(p. TTR/11-24. See also p. 11-14.)

(3) that, when all of the OCR reference units and FDD are in close proximity, the Acquisitions Branch relinquish its foreign periodical collection and the reference activities related thereto to the main library collection and the central information unit respectively. There should be added to the Library staff at the same time such linguistic capabilities as may be necessary for maintaining and providing reference service in connection with this foreign periodical collection.
(p. TTR/11-24. See also pp. TTR/11-14, 15.)

(4) That the organizational abbreviations file now located in the Document Division be transferred to the central information unit but be maintained by the Document Division or its successor.
(p. TTR/11-24. See also p. TTR/11-15)

(5) that this central information unit be supplied with all of the usual general reference tools as well as with detailed information on the capabilities of the registers and other information units, and that it be staffed with personnel who, by specific training and rotation, are thoroughly familiar with the assets of the registers of OCR and of other information units throughout the Agency.
(p. TTR/11-24. See also pp. TTR/11-19-21.)

* For a summary of task team conclusions, see p. TTR/11-21.

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c. Allocation of Space in the New Building.

It is recommended

(1) that the following activities, whether administratively part of OCR or not, be located in close proximity to each other in the new building and that they be readily accessible from the central information unit: Library, Industrial Register, Biographic Register, Graphics Register, Map Library, and Foreign Documents Division.
(p. TTR/11-25. See also pp. TTR/11-16-19.)

(2) that each of the registers be allocated reference space in the new building readily accessible to the customer but separate from the general reading room, and in close proximity to the register's files.* Such space as may be needed for this purpose should be deducted from the space presently allocated to the projected central reading area in the plans for the new building.
(p. TTR/11-25. See also p. TTR/11-17.)

(3) that the central information unit be centrally located within the Library and adjacent to the general reference materials, the catalog, and the main library collection of books and periodicals and readily accessible to the other reference units listed in paragraph c(1), above.
(p. TTR/11-25. See also p. TTR/11-17.)

(4) that, in addition to the reference space recommended for each register, there be established a large reading area adjacent to the central information unit for the consultation of general reference materials, the general reading of books and periodicals, and other activities related to the functions of the central information unit and the main library collections. 25X1
(p. TTR/11-25. See also p. TTR/11-17.)

WALTER J. MOBERG
Chairman, Task Team No. 11

* It was very apparent to this task team that the Map Library and probably FDD should also have space for an information unit and for the use of customers.

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Attachments:

Task Team Report

Appendix A. Summaries of Information on the Reference Functions of the Library, the Registers, and other Information Units.

I The Reference Branch of the Library
II The Acquisitions Branch of the Library
III The Circulation Branch of the Library
IV The Industrial Register
V The Biographic Register
VI The Graphics Register
VII The International Conferences Branch of the Liaison Division
VIII The Document Division
IX The Foreign Documents Division, OO
X The Map Library, ORR

Appendix B. Selected Returns from Questionnaire on OCR Informational Services.

Appendix C. Estimate of Volume of Traffic to be Handled by a Possible Centralized Service.

Appendix D. Comparison of Existing OCR Space for Reference Purposes and Space Projected for Reference Purposes in the New Building.

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TTR/11-6

THE SINGLE INFORMATION CENTER CONCEPT

Report of Task Team No. 11

17 April 1958

CENTRAL INTELLIGENCE AGENCY

Office of Central Reference

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TTR/11-8

CENTRAL INTELLIGENCE AGENCY

OFFICE OF CENTRAL REFERENCE

The Single Information Center Concept

Report of Task Team No. 11

I. Definition of the Problem.

1. The Problem as Assigned.

"To weigh the advantages and disadvantages of the single information center concept; specifically to determine if

a. it is feasible to create a single point for OCR customer service,

b. short-term requests can be accommodated at the single point without further referral,

c. a pilot approach could be made in advance of the big move,

d. and how the single point idea should be organized."

2. The Problem as Presented in the Consultants' Report.

a. The Consultants' Major Premise.

The consultants' report does not provide a clear and consistent definition of the proposed information center, the establishment of which, they state, is a major premise of their recommended reorganization of OCR. For example, in introducing their proposals for reorganization they state that "This recommendation is based upon the major premise of a centralized information service for CIA in OCR. By this is meant the establishment of one point of contact for users of OCR reference services. It is the intent that each OCR service division be represented at the central point."* Here, and elsewhere in the report, they do not clearly differentiate between the concept of "a centralized information service for CIA in OCR" and the concept of "one point of contact for users of OCR reference services." There is a real distinction between these concepts, however. The former relates to (a) the inclusion in OCR of certain reference services now performed elsewhere in the agency plus (b) the grouping of these together with all OCR reference services administratively in one division. The latter (the concept of one point of contact) more specifically relates to the physical establishment in a particular place of a single information unit manned by reference personnel to serve the needs of all OCR customers. It is the latter concept with which this committee is directly concerned.**

* Report of the Library Consultants, 18 May 1957, p. XVI, S.

** Task Team 16 has been assigned the problem of studying the feasibility of regrouping within OCR of certain reference-type activities now performed by other offices. Task Team 17 (not yet activated) will be responsible for the problem of organization and staffing.

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b. The Consultants' Evaluation of the Existing Information Services.

Since this task team has been asked to deal with an organizational concept as set forth by the consultants, it is important, for a proper understanding of the conclusions and recommendations that follow, that the significant aspects of this concept be noted. Broadly stated, the consultants believe that, because of the present compartmentation (Library, registers, etc.), the customer must go to many places to get the information he requires, and that he "generally does not do that, so that he may not be using all the information available to him in the Agency." They are of the opinion that there is wasteful duplication among the various sources of information in the agency, that the present space arrangements are unsatisfactory, and that satisfactory service is not provided in a reasonable time. It is their judgment that three-fourths or more of the work done by the Library Information Unit is routine reference work of the type done in normal, non-intelligence research libraries. Because library service is poor and not dependable, the customer analyst must maintain personal files on a large scale.

c. The Consultants' Recommendations.

To remedy the situation described above, the consultants strongly recommend (among other things) the establishment of "one point of contact for users of OCR reference services" based on all of the resources of OCR. Although this concept is very inadequately set forth in the report, it is possible to reduce it to a series of proposals regarding organization, space, and service.

(1) Organization. The consultants recommend the creation of a central reference division to include all reference services now performed in OCR and certain other reference activities now located elsewhere in the DDI area. Within this new division an Information Branch consisting of representation from each OCR service division (Library, registers, etc.) would provide reference service for the customer. A separate Bibliography Branch would be created to prepare specialized bibliographies, as at present, and, in addition, to index for the IPI (Intelligence Publications Index) and the Intellofax.

The consultants judge that it will not be necessary to wait for the completion of the new building to reorganize OCR and they indicate the steps that can be taken now to implement their proposals. They concede, however, that there are limitations regarding the extent to which the desired space arrangements can be realized in the present buildings.

(2) Space. The consultants point out that implementation of their recommendations is contingent upon the creation of space arrangements that are based upon the central reference concept. All of the reference supports units (the registers, linguistic unit, map unit, etc.) would be located in close proximity to each other on the periphery of a circle in the center of which would be the reading area and adjacent to which would be the "central reference desk." This central reference desk or "user-reference point of contact" would be the "one point of contact" at which all information available in OCR would be coordinated and made available to the customer.

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(3) Service. The consultants visualize that, with the organizational and space arrangements they recommend, it will be possible for the reference staff to "search and bring together for the user all information available in OCR on any given subject whether in books, documents, maps, graphics, special indexes such as the Industrial Register and the Biographic Register or in other likely sources in the Washington area." They indicate that all of this will be provided "from a single source in the Reference Division on a single request from the analyst... The materials must be obtained [presumably by the reference-librarian], they must be examined and there must be a preliminary selection in the light of the actual needs of the analyst working on a particular job. The materials must then be made available to the analyst in a form that is suitable for his use." The report states that "the questions answered in the Registers generally are no different from those the Reference Librarians answer every day, and a single information center is essential." This strongly implies that such questions can be answered centrally. However, elsewhere in the report, the consultants state that all "short-term transactions should take place at the central point, whereas long-term inquiries should be referred to those persons and files located on the perimeter of the Reading Room. For example, quick identification of a personality can be handled at the central reference point but a request for a biographic report or a biographic briefing would result in sending the user to the Biographic Register. Similar examples could be given for the Industrial Register and the Graphics Register." The committee has found it difficult to define the precise limits of the consultants' concept of the service to be provided at a "central information point." It is clear that the foregoing does not describe a point at which a customer will get his information from a single source on a single request.

In addition to centralizing the service, the report recommends faster service so that given reference questions may be answered in ten minutes or less.

In summary, the consultants state that "optimum service to analysts and others in the Agency requires complete cycle service from a single point rather than the present fragmented approaches."

3. The Limits of this Study.

Because other groups have been working on closely related subjects, this task team has attempted to remain within the limits of its assigned problem. Of necessity, recommendations in borderline areas will need to be reconciled in the discussions with the steering committee. Specifically, however, although each of the following is related to the nature and quality of the information service, this task team has made no recommendations regarding them:

a. the transfer to OCR of reference-type functions now the responsibility of other DDI offices;

b. the substantive quality of the reference services;

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c. the reference tools, the collections, and the systems of information retrieval;

d. the Special Register;

e. the branch libraries.

The proposals for the administrative reorganization of OCR have been dealt with only as they are directly related to the single information center concept.

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V. Conclusions and Findings.

1. General.

a. The "Single" Information Point Concept.

It is a major conclusion of this task team that the single information point concept presented by the consultants is illusory. Although the report states that information should be provided from a single source on a single request, in practice the consultants indicate that, except for short-term transactions, the customers would be referred to the several registers and/or presumably to other supporting information units. This does not differ materially from the present arrangements.

b. A "Central" Information Point Concept.

It should be carefully pointed out that there is a vast difference between a single information unit and a central information unit. The latter is a critical necessity in an organization as large and diverse as OCR. It is the opinion of this task team that such a central unit, the nucleus of which exists in the present Reference Branch, should be established and clearly identified as the place where (1) initial contacts for OCR reference services may be made; (2) information will be available regarding the capabilities of other OCR reference facilities; (3) short-term inquiries of a general reference nature may be answered by the use of orthodox library tools; (4) basic reference materials will be available; (5) bibliographies (including requests for Intellofax runs) will be prepared; and (6) the other reference functions now performed in the Library will be available.

2. Organization.

a. The Proposed Merging of Reference Personnel in a Single Unit.

The consultants base their major recommendations for integration of related operations upon the existence of a "reference function" in a given unit. The reference yardstick is applied throughout OCR and, presumably throughout the DDI complex, to determine whether a particular office, division, or branch should be assimilated into the central reference service. Although this task team is not directly concerned with the question of integrating specific administrative units, it is very much concerned with the fact that the reference yardstick has been extended to the point where it is proposed to separate the reference service per se from each parent organization and incorporate it in a single reference unit. This task team's investigation of the several registers, FDD, and the Map Library has clearly revealed that the reference capability of the individual reference personnel results either from their primary functions as analysts or translators or from their close association with their specialized materials. Separation of such persons from their materials or from their primary functions, and their incorporation in a single reference service would effectively destroy their usefulness as specialized reference personnel. Moreover, the assignment of specialists from the registers and other service units to a single information center, as proposed, would be uneconomical because of wide fluctuations in demands for their specialized services.

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of necessity, they would be required to become general reference librarians in order to keep them usefully employed at all times. It is the belief of this task team that the consultants' study of the registers and of other units outside the Library was too superficial for them to evaluate adequately the unique character of their reference services.

b. The Proposed Merger of Reference Services at the User Level.

The concept of complete centralization of all reference services in a single information unit has a superficial appeal that suggests greater efficiency and economy of operation and a higher level of service to the customer. On the contrary, under the special conditions existing in an intelligence agency, these same objectives may be better achieved by decentralization and specialization at the user level. For this reason this task team believes that the reference services of OCR, with a few exceptions to be noted below, should not be completely merged at the user-reference point. The decentralization of the several registers, for example, provides a logical division of the intelligence resources of OCR for purposes of specialized processing and administration. Such specialization not only contributes to greater efficiency in operation where vast amounts of diverse materials are involved, but it also develops a high degree of substantive capability within each unit which is reflected in a higher level of reference service to the customer. It is possible, although not a part of this study, that these divisions of responsibility may be further refined and that any unnecessary duplication or overlapping may be eliminated. Conceivably, other divisions may be dictated by necessity as the collection continues to grow. Such specialization is a normal development in almost all areas of human endeavor where the dimensions of the activity, the diversity of the product, or the natural divisions of the substance make separation into smaller and more coherent units desirable. It is true of educational institutions, of industry, of government agencies, and of libraries.

At the present time the three registers alone handle more requests each year than the Reference Branch of the Library. These are primarily specialized questions directed to specialized personnel or seeking special materials. It is very doubtful, indeed, that the transfer of these 23,000 requests to a single central reference unit (already handling almost 22,000 requests) would yield dividends in better service or greater efficiency. As the consultants concede, except for short-term requests, these inquiries would of necessity be referred to the registers for complete information. For the experienced analyst who already knows that the material he needs may be found in one of the registers, the interposition of a "single" central reference point would be a wasteful and needless bureaucratic hurdle.

c. Administrative Integration at a Higher Level.

Although this task team cannot endorse in detail the consultants' recommendations regarding a single information unit at the user level, it believes that the emphasis placed upon the administrative integration of the OCR reference services at a higher level is worthy of careful study.

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To be sure, such a reorganization will not, of itself, reduce the number of places a customer must go for information, but, over a period of time, it may very well have a profound rationalizing effect upon the character of the services performed at the user level. The present organization does not provide adequately for the coordination under a single head of the broad range of reference functions being performed in OCR. The very nomenclature, which identifies only one part of the collection as a "Library" (although it all could be so named) tends to convey the impression that there is no central place to which a person may go for guidance and assistance covering all of OCR's assets. The Reference Branch of the Library is actually the central reference point in the present organization but this is not immediately apparent. It is the conclusion of this task team that the most effective centralization of the reference function must take place at a level higher than an information center at the user level. It is unrealistic to expect such a center to effect a centralization in practice of services which are in fact administered separately at the next higher administrative level. The administrative integration of the Library and the several registers (without sacrificing their individual identity by merging them into one unit) may achieve more meaningful results in improved service and elimination of duplication than can the creation of a single information desk at the user level.

d. Consolidation of Reference Functions within the Library.*

The task team finds itself in agreement in principle with the recommendations of the consultants to the effect that the reference functions now being performed by the Circulation Branch and the Acquisitions Branch be transferred to a general reference division or branch.

It appeared to this task team that many of the questions now being handled by the Circulation Branch (especially in its Search Unit) were essentially the same kind that were being presented to and accepted by the Reference Branch. The allocation of the search functions to the Circulation Branch seems to be an improvisation to meet a particular need rather than a logical division of labor between reference and circulation. It is the judgment of this task team that the proper line between reference and circulation comes at the point where a book or document has been positively identified. The searching that may still ensue will then be a search for a known item. The Circulation Branch should be limited to the physical maintenance of the collection and the loan of items whose identity has been established in advance.

The reference function of the Acquisitions Branch is partly a by-product of its major responsibility for the acquisition of books and periodicals and as such is not readily separable from the branch. The remainder of its reference function, however, is related to its maintenance of a collection of foreign periodicals. This is largely an accident of physical location in close proximity to FDD and at a great distance from the main library collection.

* See also Appendix A, Parts I, II, III, and VIII

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When these units are all in close proximity, the Acquisitions Branch should relinquish its periodical collection and the reference activities related thereto to the general reference division or branch. Some of the inquiries now handled by the Acquisitions Branch, however, should probably be referred in the future to FDD.*

The task team also notes that the location of the organizational abbreviations file in the Document Division is one step removed from the Reference Branch where it should properly be kept for users. Its maintenance can still be a responsibility of the Document Division or its successor.

e. Location of the Bibliographic Service.

The consultants recommend that a separate Bibliography Branch be created in the proposed Reference Division. This branch would be separate from the information unit and would be responsible for the compilation of an enlarged IPI and the indexing of all intelligence documents for subject content (Intellofax), in addition to the preparation of specialized bibliographies for customers. Reference work has been defined as "that phase of library work which is directly concerned with assistance to readers in securing information and in using the resources of the library in study and research."** The combining of the indexing of incoming materials with a very important facet of the reference operation, or, to put it differently, the combining of input operations with output operations, in a division the chief function of which should be service to the customer, will create serious administrative problems and will probably reduce the efficiency of the information service. To be sure, a knowledge of the nature of the input is necessary to an informed and efficient preparation of bibliographies based on that input. It is believed that this is not sufficient reason for placing these operations together any more than it would be reasonable to put all ORR analysts on the Reading Panel. The logic of this arrangement would require that cataloging also be incorporated in the Bibliography Branch or elsewhere in the proposed Reference Division.

The professional requirements for indexers are not necessarily the same as those for bibliographers. Indexing does not require formal library training (for example, N.Y. Times indexers) whereas the preparation of specialized bibliographies is usually done by professional librarians. Moreover, the magnitude of the indexing operation in terms of space and personnel would dwarf the strictly bibliographic part of the branch. From the point of view of concentrating on customer service -- the main purpose of the reference operation -- it would be undesirable to have a majority of the personnel and a major part of the space devoted to the processing of the input.

* See Appendix A, Part II for a list of typical questions currently referred to the Acquisitions Branch.

** American Library Association Glossary of Library Terms.

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It is the conclusion of this committee that the preparation of specialized bibliographies is a most important aspect of the information function* and should be a unit of it. The bibliographic service should not be encumbered with and overshadowed by the massive task of indexing the input. Such specialized information as is needed regarding the IPI and the Intellofax can be adequately provided by representation from the units to which these functions will be assigned.

f. Implied Reallocation of Basic Responsibility within the DDI Complex.

The combination of the single information unit and the "complete cycle information service" contemplated by the consultants, if literally carried out, would result in the transfer to reference personnel of functions which are now the responsibility of analysts in the customer offices. They would, in effect, be doing a large part of the analytical work for the customer. Reference librarians are not trained analysts and cannot be expected to substitute for the various specialists in the intelligence production offices. Moreover, such a reallocation of function involves a basic question of the division of responsibility within the DDI complex.**

3. Space.***

a. Physical Centralization of Library, Registers, and Other Information Units.

There is perhaps no library anywhere which is operating under greater handicaps of space allocation than are the Library and the several registers of OCR. The dispersal of the primary reference collections in at least half a dozen different buildings, separated by great distances not only from each other but also from the many and widely dispersed buildings occupied by the customers, creates a formidable problem for the efficient coordination of reference services. It is probable that a very large part of the impression of "compartmentation" and "fragmentation" that disturbed the consultants was the result of the simple physical scattering of reference facilities in so many different locations. They place great emphasis upon the urgent need to bring the various reference units together in the same area in order to achieve an integrated reference operation.

* More than 50% of the time of the present Reference Branch is allocated to the preparation of bibliographies.

** See also sections 4a and b, below

*** See also Appendixes C and D

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It is the conclusion of this task team that, even if there were no administrative changes whatever, the mere physical centralization of the Library, the registers, and other information units in close proximity to each other and to the customer offices would resolve many of the problems which now prevent the provision of a fully adequate reference service. Such a centralization would of itself probably result in the spontaneous elimination of some existing duplication and the development of more efficient procedures. The close relationship of the hitherto separated and widely dispersed elements of OCR's reference collection would quickly become apparent once they were brought together in a single area.

Although no judgment is made regarding the administrative integration of FDD and the Map Library with the reference services of OCR, it is concluded that the services of these units can be performed most efficiently in close proximity to the central information point and to the other reference services. In planning the space allocations in the new building the ready accessibility of all of the reference activities in the same general area should be a prime consideration.

b. The Central Reading Area Concept.

A single, large reading room, as recommended by the consultants, and so long a feature of conventional libraries, does not lend itself to the peculiar needs of an intelligence organization. The mingling of variously classified materials from a number of separately administered collections on the tables of a single room presents serious problems of security control. It is difficult to visualize the commingling of books, periodicals, hard-copy documents (including plant folders and biographic dossiers), intellofax tapes, pictures, microfilms, and maps together in one place with adequate security coverage throughout the day and with expeditious storage at night. The elements of responsible control and individual accountability would be dangerously diluted in such a situation. Quite apart from the security implications of the arrangement, the mere physical control of such a diversity of materials from a number of different collections would present a rather formidable task. It is doubtful that intelligence research could be efficiently carried on in such an environment or that the customer analyst would find it a desirable place in which to work.

It is the firm conviction of this task team that each of the registers should be provided with a reading or information area of its own with adequate facilities for customers to consult the type of material available in that unit. Based upon an on-the-spot observation of the activities of the present information units, it is concluded that space and facilities in close proximity to the files and to the knowledgeable analysts or reference personnel are essential to the provision of efficient reference services to the customer and adequate control of the materials. A central reading area adjacent to a central reference desk and to the main catalog will still be required, but it should not be used for consulting the specialized materials of the several registers or other information units. This reading area should be used for general reading of books and periodicals, consultation of general reference materials, and such other activities as are related to the present library collection and reference service.

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c. The Pilot Approach to the Problem and the Proposed Reallocation of Space.

The consultants recommend that their proposals for reorganization, including the single information unit, be implemented in advance of the big move and that space be reallocated within the present buildings to bring as many reference services as possible together in the Stadium. Since this task team has concluded that a single information unit is neither feasible nor desirable, it has not attempted to suggest how a pilot approach to such a unit should be organized. It has, however, examined the proposals regarding reallocation of space since these have a significance of their own quite apart from the suggested administrative changes.

The conclusions of this task team regarding space reallocation within the present buildings are necessarily incomplete and are related only to the proposals concerning an information center. Any decisions regarding the major movement of OCR units before the move to the new building should be deferred until all of the task team reports are in and a final determination has been made regarding the various proposals for reorganization.

The consultants propose that the Library and either the Graphics Register or the Biographic Register be moved to the Stadium. These moves are contingent upon the movement of a number of other units, including the Document and Liaison Divisions, which would be transferred to M Building. Under this plan one of the registers, FDD, and the Map Library would not be physically in close proximity to the other reference units or to the proposed single information center, and the Acquisitions Branch would not be moved. Full centralization would thus not be achieved.

This task team is willing to accept the consultants' statement that the recommended moves are physically possible. It believes, however, that any advantages that might accrue from such a partial centralization of reference facilities are more than offset by a number of adverse factors. Little would be gained in bringing a larger group of reference people together on the periphery of a circle in the Stadium if by so doing their services became less accessible to the customer. For example, the Library, as presently located in M Building, is readily accessible to ORR and OCI, which together provide more than half of the reference requests from the DDI area.* Moving the Library to the Stadium will certainly make it less accessible to these two major customers and will not bring it closer to other users (in the DDP and DDS areas, for example). Neither the Graphics Register nor the Biographic Register is now located in a building together with any of its customers; moving either one to the Stadium will add little to its accessibility. With respect to GR, the change in location would result in a neglible advantage for ORR, the major agency user of GR (23% of total agency requests in 1957).

* The figures for 1957 use of the Library reference services by DDI offices are as follows:

ORR	OSI	OO	OCI	ONE	Other DDI	Total
3664	2263	862	501	150	304	7,744

The preponderant use of the Main Library by ORR and OCI together is even more evident when it is considered that the vast majority of the OSI requests are handled by a branch library.

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TR, the second largest agency user of GR (17%), as well as substantially all other users outside OCR itself, would gain nothing.* With reference to BR, the chief users (OO and FI), accounting for more than 67% of the requests in 1957, are already separated from it by great distances; a move from North Building to the Stadium would have no significance for them. Although some slight advantage may result where analysts wish to use more than one unit on the same visit; no statistics are available to indicate the extent to which this may be true nor whether the proposed combination in the Stadium would be the optimum one for this purpose. The fact that only partial centralization can be achieved reduces substantially the chances for multiple contacts on a single visit.

It is the judgment of this committee that, whatever small advantages may result from the proposed relocation of the Library and one register in the Stadium, these are insufficient to justify the major disruption of OCR services and the costs that would be involved. There is the added possibility that construction of the proposed bridge over the Potomac may require the evacuation of the Stadium and M Building before the new CIA building is completed. Implementation of the consultants' recommendations and the evacuation of the buildings for the construction of the new bridge would mean two major dislocations of OCR services within a relatively short period of time prior to the move to Langley.

4. Service.

a. The Unique Character of OCR Reference Services.

The consultants' report makes frequent reference to non-intelligence and conventional libraries in evaluating the services of OCR. It is the opinion of this task team that the OCR reference services and those of conventional and non-intelligence libraries are not directly comparable; criteria that apply to conventional libraries should not be used without discrimination to judge the OCR operation. It should be pointed out particularly that the extensive work done by OCR in gaining control of, disseminating, and properly filing the many thousands of documents of all types which come to their attention is unique in a library system. The handling and control of this material, much of which is not readily coded and contains, in most cases, only small scraps of valuable but varied information, is manifestly a much greater task than is the control of the books and periodicals handled by more conventional libraries. As a result, the extensive knowledge possessed by each OCR analyst with regard to the material under his jurisdiction cannot be adequately transferred to the customer through a third party. Close contact and consultation between the OCR specialist and his customer are therefore essential.

This expert knowledge possessed by the OCR specialists is not sufficient, however, to permit the customer to make a single request at a single point and expect that all the required supporting documents will be issued to him almost automatically as the product of "complete cycle service."

* OCR itself also accounted for another 17% of requests.

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He must be able to examine many of the materials which by their very nature cannot be adequately selected by an intermediary. As an example, a customer trained in physical chemistry, assigned to the problem of evaluating Soviet progress in the development of infra red analytical equipment, might well expect the OCR graphic analyst, after consultation between them, to select photographs of numerous research items involving beam transmission. He could hardly, however, expect a degree of expertness which would correctly identify the infra red equipment from among a myriad of items covering X-ray, ultra-violet, visible light, etc. It seems apparent that this total process as described above is vital to the development of research; it is part of the necessary analytical technique and each individual (OCR analyst and customer) must play his own part. It seems clear that the various responsibilities can be delegated only within carefully delineated areas.

b. The Role of the Reference Librarian.

There is still a large area in which general reference librarians may legitimately operate in order to make available to the customer the materials he needs. Guidance in the use of general reference tools, requests upon the Intellofax system for subject retrieval of documents, searches in the book catalog, and the preparation of specialized bibliographies -- all require the services of the trained librarian. These services are in addition to, and not in lieu of, the close contact and consultation between the researcher and the specialist in the registers or other information units.

c. Analysts' Use of OCR Informational Services.

The contention of the consultants that, because there are so many places to go for information, the analyst generally does not go to them is not borne out by the responses of more than 400 analysts to a questionnaire on OCR informational services. This study reveals that, not only is there very extensive use of the several registers and other information units, but, in spite of the great inconvenience of doing so, a very significant percentage of the users actually go to these facilities in person.* The impression of general analyst dissatisfaction with OCR service, which is conveyed by the report, is also not confirmed. The returns on 421 questionnaires do not reveal any widespread criticism of OCR information services nor do they contain significant evidence that a reduction in the number of reference points is urgently desired.

d. The Single Information Point Concept and the Short-term Request.

The consultants believe that "all short-term transactions should take place at the central point...." It appears from the context that a "short-term transaction" is one that can be handled quickly. In another place the report indicates that a "quick reference question" is one that can be answered in ten minutes or less.

* See Appendix B.

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The speed with which a question can be answered depends on many factors -- the nature of the question, the experience and intelligence of the librarian and of the requestor, the availability of the reference tools, the efficiency of the retrieval system, the current workload, and many others. These are matters outside the purview of this task team. The pertinent question for this investigation is whether all questions that can be answered quickly (after clearing the hurdles listed above) could or should be handled at a single, central point.

The fallacy in the consultants' recommendation is one of over-simplification. The length of time it takes to answer a question is not its essential characteristic. It is the substance of a question that determines not only how long the answer will take but also where the answer should be sought. To be sure, many, if not most, quick reference questions will be answered, as at present, at the central reference point on the basis of the general reference tools there available. However, many quick reference questions can and should be answered by the specialists in the several registers who are best able to answer them. The experienced analyst will not be inclined to refer a question to a central point merely because it is brief if he knows that it can be answered even more quickly and accurately in one of the registers.

If "all short-term transactions" are to take place at a central point, then all of the files and all of the specialists must be available at that point. This task team has already rejected the suggestion that the specialized personnel from the registers and other units be added to the central reference staff. It is obvious that only to a very limited degree could the files of the several registers be duplicated at a central point; without these files the specialists would be unable to answer most questions whether they be long or short.

The establishment of a "single point" will not of itself make possible the more expeditious handling of so-called "short-term transactions" nor of long-term ones either. It is the belief of this task team that the single point concept is itself unsound and that multiple contacts are not only desirable but essential.

5. Summary of Conclusions.

a. General

(1) The single point concept is illusory. A careful reading of the consultants' report reveals that the customer will not in fact get his information from a single source on a single request.

(2) A central information unit is desirable, and although the nucleus of such a unit now exists, the concept should be more fully developed; the central unit should be clearly identified and operate as such.

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b. Organization.

(1) The proposed separation of reference personnel from the registers and other information units and their incorporation in a central unit would destroy their usefulness as specialized reference personnel.

(2) The reference services should not be merged at the user level; decentralization and specialization at this level are desirable.

(3) The most effective centralization of the reference functions must take place at a level higher than an information center at the user level.

(4) There are some reference activities now being performed elsewhere in the Library, notably in the Circulation and Acquisitions Branches, which should be transferred to a central information unit.

(5) The bibliographic service should not be encumbered, as proposed by the consultants, with the indexing of incoming materials.

(6) The "complete cycle service" as described by the consultants would result in an undesirable reallocation of basic responsibilities within the DDI complex.

c. Space.

(1) The physical centralization of the various reference activities in close proximity to each other and to the customer offices would resolve many of the problems which now prevent the provision of a fully adequate reference service.

(2) A single, large reading room does not lend itself to the peculiar needs of an intelligence organization. Each of the several reference units should be provided with a reading or information area of its own in the new building in addition to the central reading area adjacent to a central information unit.

(3) Any advantages that might accrue from the proposed reallocation of space in the present buildings are offset by a number of adverse factors. However, a final conclusion in this matter should be deferred until all of the reports are in and a final determination regarding possible changes in organization can be made based upon all of the data available.

d. Service.

(1) The reference services of OCR and those of non-intelligence libraries are not directly comparable.

(2) Although close contact and consultation between the OCR specialist and his customer are essential, and the customer must frequently examine the intelligence materials himself before a selection can be made, there is still a large area in which general reference librarians may properly operate.

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(3) The evidence does not support the consultants' contention that analysts generally do not go to the various registers and other information units.

(4) The establishment of a "single point" will not of itself make possible the more expeditious handling of so-called "short-term transactions."

(5) The single point concept is unsound; multiple contacts are not only desirable but essential.

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I. Recommendations.

1. Administrative Integration of OCR Reference Services.

In order to reflect the essential unity of the various intelligence collections in OCR and in order to achieve greater efficiency and probably economy of operation, it is recommended that careful study be given to the possibility of effecting, as soon as possible, an administrative integration of the Library and the registers under a single administrator responsible only for reference services. (A delineation of the form such a reorganization should take is beyond the area of study assigned to this task team.)

2. Establishment of a Central Information Unit.

It is recommended

a. that, in lieu of the single information unit recommended by the consultants, a central information unit be established within the Library, using the present Reference Branch as a nucleus. This unit should be clearly identified as the place where (1) initial contacts for OCR reference service may be made; (2) information will be available regarding the capabilities of other OCR reference facilities; (3) short-term inquiries of a general reference nature may be answered by the use of orthodox library tools; (4) basic reference materials will be available; (5) bibliographies (including requests for Intellofax runs) will be prepared; and (6) the other reference functions now performed in the Library will be available.

b. that the reference functions now being performed by the Circulation Branch be transferred to this unit.

c. that, when all of the OCR reference units and FDD are in close proximity, the Acquisitions Branch relinquish its foreign periodical collection and the reference activities related thereto to the main library collection and the central information unit respectively. There should be added to the Library staff at the same time such linguistic capabilities as may be necessary for maintaining and providing reference service in connection with this foreign periodical collection.

d. that the organizational abbreviations file now located in the Document Division be transferred to the central information unit but be maintained by the Document Division or its successor.

e. that this central information unit be supplied with all of the usual general reference tools as well as with detailed information on the capabilities of the registers and other information units, and that it be staffed with personnel who, by specific training and rotation, are thoroughly familiar with the assets of the registers of OCR and of other information units throughout the agency.

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3. Allocation of Space in the New Building.

It is recommended

a. that the following activities, whether administratively part of OCR or not, be located in close proximity to each other in the new building and that they be readily accessible from the central information unit: Library, Industrial Register, Biographic Register, Graphics Register, Map Library, and Foreign Documents Division.

b. that each of the registers be allocated reference space in the new building readily accessible to the customer but separate from the general reading room, and in close proximity to the register's files.* Such space as may be needed for this purpose should be deducted from the space presently allocated to the projected central reading area in the plans for the building.

c. that the central information unit be centrally located within the Library and adjacent to the general reference materials, the catalog, and the main library collection of books and periodicals and readily accessible to the other reference units listed in paragraph 3 a., above.

d. that, in addition to the reference space recommended for each register, there be established a large reading area adjacent to the central information unit for the consultation of general reference materials, the general reading of books and periodicals, and other activities related to the functions of the central information unit and the main library collections.

* It was very apparent to this task team that the Map Library and probably FDD should also have space for an information unit and for the use of customers.

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SUMMARIES OF INFORMATION ON THE REFERENCE FUNCTIONS OF THE LIBRARY, THE REGISTERS, AND OTHER INFORMATION UNITS

Part I. THE REFERENCE BRANCH OF THE LIBRARY

1. Location, organization, size, and functions of unit.

a. Location. M Building

b. Number of persons, their average grade levels and qualifications, duties, collateral duties, workload.

The reference function in the Library is primarily handled by the Information Section of the Reference Branch. There is also a small amount of reference service provided by the Circulation Branch. This service arises from the fact that requests for the purchase of documents, books, and periodicals may be incomplete, thereby requiring work by the Search Unit in order to establish a more complete identification. In so doing, the Search Unit utilizes reference material. If this unit is unable to identify the item, the problem is then turned over to the Reference Branch for further action.

The Information Section of the Reference Branch has the following composition:

1	GS-13	Chief
3	GS-12	Senior Librarians
4	GS-11	Librarians
5	GS-9	Librarians
3	GS-7	Librarians
1	GS-5	Clerical
Total 17		

In general, all professionals have a library background gained by formal education leading to a degree in Library Science and/or by experience gained in library practice. All professionals are concerned with satisfying requests by customers, including the necessary research and report writing. Such research may be accomplished with material available in the reference space, or it may require the librarians to consult various other facilities available in the Washington area. As a result, the senior librarians, particularly, are frequently at the Library of Congress or other area libraries.

In addition to carrying out research and related report writing, the librarians, in rotation, serve as advisors in the Reference Information Center, answer telephone requests, and return reference material to the proper shelf.

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c. Space used by reference unit.

The Information Section controls 2160 square feet of space, including stacks, corridor, and librarians' working area. If all librarians are present, this space is completely utilized. To a limited extent, however, customers are able to use this space for research. In general, they use the Reading Room (1150 square feet) for working on reference material.

d. Facilities for customers.

Only very limited facilities are available to customers. For research, as indicated above, they generally use the Reading Room. Mechanical facilities, such as microfilm viewers, enlargers, and printers, are not available in this area; customers are expected to use facilities in other parts of OCR.

2. Identity of customers.

In FY 57 the Library Reference Service answered a total of 21,557 requests, as follows:

a. CIA - 20,360

DD/I	7744	(ORR-3664, OSI-2263, OO-862, OCI-501, ONE-150, Other-304)
DD/P	7327	
Other	5289	

b. Non-CIA - 1197 (State-81, Army-664, Navy-80, Air-100, AEC-2, Other-270)

3. Character of requests.

a. By phone, in person, through intermediaries.

Telephone - The largest number of requests come by this means. Many of these are from IR and BR.

In person - Almost as many requests are made in person as by telephone.

Written - Relatively few written requests come in. These are largely from outside customers (note relatively few non-CIA customers serviced in FY 57).

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b. Types of requests.

The Library divides requests into directional (answered in less than 2 minutes), informational (2-15 minutes), research (16 minutes-2 hours), and bibliographic (more than 2 hours). The distribution of these requests is as follows:

Request	Percentage of Questions	Percentage of Time
Directional	21	0.5
Informational	46	7.5
Research	31	41
Bibliographic	2	51

In general, librarians answer any request they consider reasonable. In so doing they may merely indicate to customers where certain information is likely to be found, up to performing extensive research and report writing for the customer, on and off the premises. In performing their various functions, librarians also process Intellofax requests (select codes, phone machine division, deliver tapes or cards), compile bibliographies, identify documents from incomplete and inaccurate descriptions, and act as intermediaries in obtaining information for customers from BR, IR, GR, State, etc. They do not allow reference material to leave the reference space, but will provide thermofax copies of selected material.

4. Extent of research or screening done by customers in unit or by unit personnel.

Both customers and unit personnel utilize the reference material available in the reference space. Within reason, the librarians provide any service asked of them.

5. Evidence of duplication.

Certain of the reference material is available in other areas of the agency. However, the service provided by the librarians is not duplicated elsewhere. Requests on them for biographic, graphic, or industrial information are turned over to the respective registers. However, the Library frequently aids the registers in answering specific questions on which the information is not available in the given register.

6. Advantages or disadvantages of providing services of this unit through a single central OCR information unit.

This unit would fit fairly well into the concept of a truly centralized service, inasmuch as it appears to function to a certain extent in this manner at the present time.

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Part II. THE ACQUISITIONS BRANCH OF THE LIBRARY.

1. Location, organization, size, and functions of unit.

25X1

a. Location. [redacted] 350-26th Street.

b. Number of persons, their average grade levels and qualifications, duties, collateral duties, workload.

[redacted] 25X1

Branch Chief - is chief of an OCR Branch, and works with the State Department in the procurement of publications.

Area Coordinators (GS-11)

Various other personnel

The function of the branch is to receive periodicals, books, and monographs procured in response to direct request or routinely in selected categories, for either CIA or community needs, as a service of common concern, and to control, catalog, and disseminate such publications.

c. Space used by reference unit.

In lieu of a reference facility, two tables and chairs are provided for accommodation of visiting analysts (generally from other IAC agencies) who desire to make personal contact with the Area Coordinators who, as procurement officers, become knowledgeable on matters of intelligence interest. Acquisitions Branch has a dissemination component, book component, and support functions. Books retained go to the Library. Periodicals are stored in Acquisitions Branch. The volume of material handled each day runs from 15 to 20 Class A pouches.

2. Identity of customers.

Customers include representatives of agencies participating in the PPO program, and the various DD/I and DD/P offices of CIA. FDD, which is the major customer, enjoys first priority in access to periodicals for exploitation.

3. Character of requests.

Typical requests served by this branch:

a. Referring to publication content, bibliographies, identification:

(1) What book, journal, or newspaper carries the speech of a prominent political or military leader? Does the text differ from that carried by AP, UP, etc? Do the Chinese mainland versions compare with the press of the USSR?

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(2) What listings are available, or can one be produced, on Japanese scientific journals, giving identity of issuing authority and category of research produced?

(3) Compare AB holdings of Sov Bloc publications with those of LC, Hoover, Harvard-Yenching, etc.

(4) From garbled intercepts (FBIS) and/or from confused mixture of various transliteration systems (e.g., international, French, LC, etc.), can the true title be established?

(5) Identify USSR publishing houses and illustrate with titles of recent receipts from each.

(6) Can the pre-publication data for monographs issued by MRC or RFE be established and supplied on a periodic basis to DD/P?

b. Referring to operations or operational support:

(1) Prepare list of all diplomatic and consular listings received in calendar year 1957, indicating priority of recipient and total copies received.

(2) Draw up chart showing air and surface pouch times for materials received in 2nd quarter FY 58.

(3) Compare requirements for telecommunication requirements as expressed by WF (OSI, OO, ORR), SP, and INR/SPS.

(4) Prepare report on extent of USSR publication receipts and indexing made on same for all departments and agencies in PPO program.

(5) As received, hold aside all copies of USSR and Soviet Satellite publications which contain illustrations of earth satellites and/or astrophysical developments for calling to DD/I attention.

4. Extent of research or screening done by customer in unit or by unit personnel.

Periodicals (books and monographs) are scanned by FDD. Procurement is through PPO's, attaches, ACSI and ONI.

5. Evidences of duplication in terms of data available, service performed and the like.

A central point of reference does not now exist, resulting in some doubt that if an analyst wants data on a specific incident, all the resources of FBIS, FDD, Acquisitions Branch, and the Library would necessarily be tapped. The branch does no coding or indexing of information.

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6. Advantages or disadvantages of providing services of this unit through a single central OCR information unit.

Proximity to FDD is vital. Location in the new building will improve the opportunity for rendering a better service of common concern, since all repositories of information will be in proximity and presumably none will be overlooked in satisfying a specific requirement.

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Part III. THE CIRCULATION BRANCH OF THE LIBRARY

1. Location, organization, size, and function of unit.

a. Location. M Building

b. Number of persons, their average grade levels and qualifications, duties, collateral duties, workload.

The Circulation Branch consists of three sections under a branch chief:

1. The Control Section (Search Unit) has 11 people:

1-GS-11
2-GS-9
2-GS-7
5-GS-5
1-GS-4 (messenger)

One of this group (the Chief) has an MA in Library Science, seven are college graduates, and the remainder have no previous training or little or no college education.

2. Branch Libraries Section services the libraries in various buildings:

1-Chief, GS-11 (MA in Library Science)

K Branch	-5 people
J Branch	-½ person
Barton Branch	-3 people
Training Branch	-5 people

3. Services Section has the following personnel breakdown:

Book and Periodicals	-5 people
IAC Unit	-5 people
Copy Unit	-7 people
Interlibrary Loan Unit	-6 people

c. Space used.

The Circulation Branch now occupies 9,571 square feet of space. This includes all the auxiliary libraries except training. It is proposed to expand this area in the new building to 17,375 square feet.

d. Facilities for customers. No special facilities.

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2. Identity of customers: the entire intelligence community.

3. Character of requests.

a. By phone, in person (particularly in the branch libraries), and by written requests (over 50%).

b. The Control Section (or Search Unit) was established in 1956 to provide bibliographic identification for any type of request levied upon CIA Library which might result in the purchase of a book or periodical, an inter-library loan, or the loan of documents or books from microfilm or from original copy. The searchers establish the identity of the material so that other Circulation Branch personnel may actually obtain the item either from the CIA Library resources or elsewhere.

4. Evidence of duplication in terms of data available, services performed and the like.

The personnel of the Search Unit perform reference services similar to some of those the Reference Branch provides in the preparation of bibliographies and the answering of normal reference questions involving classified materials. Although the former unit is concerned primarily with identification of documents and other holdings and the latter with subject identification, the line is not clearly drawn. In either case, the search function is essentially the same.

5. Advantages or disadvantages of providing services of this unit through a single central OCR information unit.

The services of the Search Unit are confined to the identification of materials in the Library collection. It would not be feasible to have a single unit of this type perform the same function centrally for all of the registers and other information units as well. However, the number of places a person is required to go for information <u>within</u> the Library could be reduced by combining the reference functions of this unit <u>with</u> those of the Reference Branch.

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Part IV. THE INDUSTRIAL REGISTER

1. Location, organization, size, and functions of unit.

a. Location. 350-26th Street

b. Number of persons, their average grade levels and qualifications, duties, collateral duties, workload.

Supervisor of the Reference Unit. Approximately one-half of his time is spent supervising and participating in this work.

Receptionists (two)
GS-9 (3 year college training) - 100%
GS-5- 100%

These individuals answer the simpler questions, refer customers to specific branches and/or analysts in the Industrial Register, and bring material from the files to the customers.

It should be noted that all of the analysts, insofar as they consult with the customers, answer spot questions and bring file material to their attention, also perform a reference function. File clerks also, to a very limited extent, provide a reference service by bringing file material to the customers.

c. Space used by reference unit.

The space serviced by the two receptionists covers 960 square feet and contains 16 tables or desks. All customers use this space except SAC, which has a separate area of 417 square feet, containing six tables. Certain reproduction equipment is also located in this area.

In an average month the available space is filled by customers on five days. For the balance of the time, the space is more than ample to satisfy the demand.

d. Facilities for customers.

Tables and desks, as indicated above, plus some equipment for making prints from microfilm, and for photo-copying of hard copy.

File material supplied to customers for reference use is almost always in hard copy, but copies produced for customers may be made either by photo-copying of hard copy or by enlarging microfilm.

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2. Identity of customers.

In FY 57 IR provided service as follows:

a. CIA - 2970		
	DD/I	1602 (ORR-993, OSI-337, OO-258, OCI-9, Other-5)
	DD/P	387
	Other CIA	981
b. Other Agencies		3683 (State-22, Army-537, Navy-197, Air-2870, AEC-12, Other-45)

It is interesting to note that the Air Force (primarily SAC) made as many requests for service as did all of CIA.

3. Character of requests.

a. By phone, in person, through intermediaries.

An estimated 15-20% of the requests on IR are calls to analysts and/or receptionists by telephone. An estimated 99% of these telephone calls come from CIA, a majority from BR and GR. Only 1% of the requests are written, not accompanied by the requesters. Approximately 80% of the requests are verbal, made in person by the requesters.

b. Types of requests.

The time necessary to fulfill a request varies from a few minutes up to two weeks. The average time required is approximately 2 $\frac{1}{2}$ hours (time spent by IR analysts, receptionists, file clerks.) In most cases material is supplied to the customer in the form of the entire IR file on a given installation, and it is expected that the customer will perform the necessary research. Copies of any given portion can then be supplied upon request, in the form of photostats of hard copy or enlargement of microfilms (this latter occurs infrequently). In general, IR analysts do not select material from a given file or prepare reports (collation of material) to satisfy customer requests, except for requests originating overseas (DD/P, REG, etc.). In these cases, IR analysts will perform research and produce reports as necessary to answer specific questions. It is this type of service which takes some weeks of effort on the part of IR to satisfy.

4. Extent of research or screening done by customer in unit or by unit personnel.

As indicated above, except for overseas requests, IR analysts simply indicate in which files material is to be found; the customer does the screening. This latter he accomplishes by going over the entire file(s) of given installation(s); the file(s) is delivered to him in the customer area by an analyst, receptionist, or file clerk.

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5. Evidences of duplication.

Most, if not all, of the material which is in the various IR files, is also availalbe from the Intellofax system or in BR or GR. However, only in IR is it available in connection with the specific factory or installation with which the material is associated. Therefore, if one wishes to approach BR or GR material through the factory system, IR is the logical starting place. In this sense, while there is a duplication of material, there is no real duplication of service.

6. Advantages or disadvantages of providing services of this unit through a single central OCR information unit.

Because of the nature of the service provided (individual analyst advice, access to complete files) it is difficult to see, except for spot answers and information on where to go for help, how IR could fit effectively into any completely centralized single service.

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Part V. THE BIOGRAPHIC REGISTER

1. Location, organization, size, and functions of unit.

a. Location. North Building

b. Number of persons, their average grade levels and qualifications, duties, collateral duties, workload.

There is no specific reference unit. However, all analysts (grades GS-9 and GS-11) handle requests for information. Their main duty is to become familiar with personalities in a given area, maintain dossiers, read literature, etc.

c. Space used by reference unit.

None (there is no specific reference unit)

d. Facilities for customers

There are five sections; one desk per section on the average is available for customers.

2. Identity of customers.

In CIA, requests are from DD/P, OSI, and OO (in that order).

3. Character of requests.

a. By phone, in person, through intermediaries.

Most identification requests come in by phone; long-term projects are received by memorandum or by personal call.

b. Types of requests.

60-70% ask for identification of an individual
30-40% are research type of request
In a typical year, there are approximately 4900 requests, covering such items as:

Completely documented reports on 14,000 individuals and 137 organizations.
8700 brief informal summaries on individuals and on 231 organizations.
Thermofax reproductions of biographic information from BR files on 7600 individuals.
Intellofax production of 62,000 Who's Who cards
15,200 dossiers consulted by visitors
85 machine listings containing references to 866,000 names

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4. Extent of research or screening done by customer in unit or by unit personnel.

The customer is encouraged to screen much of the material himself.

5. Evidence of duplication in terms of data available, services performed, and the like.

OSI probably duplicates personality files to some extent on scientists (one girl in OSI/E spends full time preparing 5x8 cards on personalities), OCI probably duplicates State/BI files to some extent on political figures.

6. Advantages or disadvantages of providing services of this unit through a single central OCR information unit.

No one person or persons in BR could perform the reference function and be knowledgeable on all areas. Best approach is a direct contact with the area specialist.

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rt VI. THE GRAPHICS REGISTER

1. Location, organization, size, and functions of unit.

a. Location. Building 14

b. Number of persons, their average grade levels and qualifications, duties, collateral duties, workload.

The function of the Graphics Register is to provide a supplementary service of common concern in providing the intelligence community with "ground" or "spot" photographs, photographs of persons, and motion picture films.

Film Branch

The immediately available assets of the film service consist of a unique collection of non-government produced films. In addition, collections elsewhere in the community are exploitable. The reference function is located within the Service Section of the Branch which is comprised of 4 professionals (GS-9 to GS-12) who have competence in audio-visual arts, and 8 personnel (GS-4 to GS-9) who constitute the support activity, including cataloging. This section performs procurement duties as collateral to primary reference duties.

Photograph Branch

The 4 professionals in the Service Section have part-time duties as reference assistants (time of $1\frac{1}{2}$ men is spent out of the office working on standing requirements for air-photo intelligence on file at defense agencies, and fulfilling needs for air-photo cover in official defense repositories.)

These men are supported by 3 file clerks, 1 control clerk, and 1 technician.

c. Space used by reference unit.

Film Branch: 560 square feet by Service Unit (Reference)
48 square feet by Analysis Section (File Area)
170 square feet by Inspection Unit
187 square feet by Library records from which Intellofax-type runs are made
100 square feet by Editing Unit

Photograph Branch: 460 square feet for reference service
1000 square feet card file space
450 square feet "picture of people" collection

The collection of photos of people has no separate reference activity. Reference functions are conducted collateral to other work done by the GS-9 and GS-11 analysts on this job.

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d. Facilities for customers.

Film Branch

Projection Room (26 seats) where analysts may review films, a room where editing-viewing equipment is available for use by analysts searching for "spot" photographic information, and chairs where analysts sit face to face with service personnel to discuss their needs.

Photograph Branch

Up to 20 customers assemble in reference room at one time where there are 3 large tables to accommodate them.

Customers needing spot or ground photographs may browse at will in the extensive files where about 500,000 photographs of places and things are actually on file, each picture being attached to a card filed alphabetically within areas, and coded by marginal markings indicating subject category.

2. Identity of customers.

Film Branch

In CIA, DD/I is the major group customer, although Office of Training is the largest customer for films, and accounts for about 1/3 of the business done. GR, after receiving notices of films, sends its people to GR to view promising material, or to extract spot "stills" for exploitation.

Service is also rendered to National War College, Foreign Service Institute, IAC members, and others.

Photograph Branch

Customers from CIA constitute 60% of the total, 60% from DD/I and 40% from DD/P. Most customers are regular repeaters.

3. Character of requests.

a. By phone, in person, through intermediaries.

The Service Section receives 300 formal requests per month, equal to 600 to 1000 separate requests for specific films. Requests for reference service are by phone (50%), by memo (30%), and by personal visit (20%).

The Photograph Branch receives requests which total about 650 per month, of which 200 are personal visits, balance being by memo or phone.

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b. Types of requests.

Negatives of spot or ground photographs are filed separately in duplicate from which the customers' needs may be printed. Normal service (95%) takes several days, but crash demands (5%) can be satisfied within the branch.

In response to the 650 requests received, some 15 to 20 thousand pictures per month are delivered, not including another 15 thousand air photographs.

4. Extent of research or screening done by customers in unit or by unit personnel.

The Industrial Register has standing requirements with GR. IR personnel screen photographic material in order to request prints of industrial installations for plant dossiers and town plans.

All unit personnel do extensive screening for special requirements.

5. Evidences of duplication in terms of data available, services performed, and the like.

None

6. Advantages or disadvantages of providing services of this unit through a single central OCR information unit.

At present the library records are situated remote from the reference area on the floor below (some also in room adjacent to Service Section). This situation will be corrected in the new building, where all relevant operations will be in closer proximity.

The reference service rendered is too specialized to be susceptible of complete integration into a centralized reference function in a central activity.

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Part VII. THE INTERNATIONAL CONFERENCES BRANCH OF THE LIAISON DIVISION.

1. Location, organization, size, and functions of unit.

a. Location. 350-26th Street

b. Number of persons, their average grade levels and qualifications, duties, collateral duties, workload.

Liaison Division as a whole: 24 persons, of whom 15 are engaged in direct liaison activity.

International Conferences Branch: 7

c. Space used by reference unit. No separate reference unit.

d. Facilities for customers. No separate facilities for customers.

2. Identity of customers.

In 1957 the Liaison Division received 1453 formal requirements, 956 of which were within CIA and 497 from other agencies. The DD/I area accounted for 742 of the internal requirements. In the same year 14,600 informal service requests were received (not compiled by requesting office), of which 9846 were from CIA and 4754 from outside agencies.

No separate information is available on the number which might be called "reference" requests.

3. Character of requests.

The majority of reference requests are received by the International Conferences Branch as a by-product of their custody of hard-copy material which they hold for operational purposes. The scientific and technical (so-called S & T) material is now being transferred (after pertinent data have been extracted) to BR where it is reportedly inactive. (LD still has a Kardex file of this material to turn over to BR). No similar arrangement has been made for the non-scientific and technical files (1200 or more). The Trade Fair file is almost exclusively related to collection and does not entail significant reference activity.

4. Evidences of duplication in terms of data available, services performed, and the like.

No duplication is evident.

5. Advantages or disadvantages of providing services of this unit through a single central OCR information unit.

The Liaison Division is attempting to rid itself of the reference functions associated with its custody of the international organizations files listed above. It is desirable that these materials be held elsewhere, probably in the registers. Since the remaining reference functions of this division are related either to its own reports or are incidental to its basic operations, they cannot be handled centrally.

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Part VIII. THE DOCUMENT DIVISION

1. Location, organization, size, and function of unit.

a. Location. 350-26th Street

b. Number of persons, their average grade levels and qualifications, duties, collateral duties, workload.

There are two reference-type activities. Both are located in the Analysis Branch of the Document Division. They are rather minor functions conducted as part-time work by regular employees.

The first of these consists of rendering a reference service for abbreviations of various organizations of intelligence interest- world-wide, gleaned from documents- together with a statement of the character of activity in which the organization is engaged. Reference service is rendered as a collateral duty by a GS-9 document analyst. Since 1950 approximately 40,000 cards have been filed with data on abbreviations gleaned from publications during normal coding operations.

The second is concerned with maintaining the "Flash" file and responding to service requests. The "Flash" file consists of large loose-leaf binders containing information on repetitive reports (e.g. State "Weekly Coal Reports"). The original despatch or attache report is coded and entered in the Stellofax system, but subsequent issues are merely logged in on the "Flash" sheet without repetitive coding. The "Flash" files are maintained by a GS-5.

c. Space used. Work done is collateral to other duties.

d. Facilities for customers. No special facilities.

2. Identity of customers.

For the abbreviation file: customers include DD/P, BR, OSI, NSA, and the Reference Branch of the Library.

For "Flash" file : the customer is usually the Circulation Branch of the Library in identifying subsequent issues.

3. Character of requests.

a. By phone, in person, through intermediaries.

For abbreviations: of the 15 requests per month for reference service, phone calls from the Reference Branch total about 70%; others are from DD/P, BR, OSI, and NSA.

For "Flashes" : 90% of the phone calls from the Circulation Branch are for State "Flashes" and the other 10% for information on Defense "Flashes."

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4. Evidences of duplication in terms of data available, services performed, and the like.

No duplication is evident

5. Advantages or disadvantages of providing services of this unit through a single central OCR information unit.

Both of the reference activities would benefit from a location in physical proximity to other reference functions, bearing in mind that the duties are collateral to other work.

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Part IX. THE FOREIGN DOCUMENTS DIVISION, OO

1. Location, organization, size, and functions of unit.

a. Location. [redacted] 25X1

b. Number of persons, their average grade levels and qualifications, duties, collateral duties, workload.

There is no specific reference unit. However, all analysts (average grade GS-9 and higher) handle reference requests. Their main duty is to exploit "documents" on the subject for which each is a specialist (in a given area).

c. Space used by reference unit.

None specifically, only chair space next to an FDD analyst.

2. Identity of customers.

ORR, OSI, and DD/P are the heaviest customers within CIA. All IAC agencies avail themselved of these reference services.

3. Character of requests.

a. By phone, in person, through intermediaries.

Spot requests come by phone. A formal spot request may come through Liaison Division. All long-term projects come through and are approved by the Subcommittee on Foreign Language Exploitation.

b. Types of requests.

No copies of original "document" are ever given out.
Project may vary in length up to months and even years in terms of exploitation.
Verbatim translations are contracted out.

4. Extent of research or screening done by customer in unit or by unit personnel.

Since most customers cannot read the original language, all research or screening is done by unit personnel.

5. Evidences of duplication in terms of data available, services performed, and the like.

Duplications in translations are avoided through the Consolidated Translation Survey.

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6. Advantages or disadvantages of providing services of this unit through a single central OCR information unit.

In the present set-up and in the new building, FDD is adjacent to the Acquisitions Branch of the Library where the foreign language materials are maintained after exploitation.

Requests have to be answered by the subject specialist and no one person in either FDD or in a central reference center could answer the questions. It is necessary for the customer to deal directly with the FDD expert.

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Part X. THE MAP LIBRARY, ORR

1. Location, organization, size, and functions of unit.

a. Location. [redacted] 25X1

b. Number of persons, their average grade levels and qualifications, duties, collateral duties, workload.

Under a branch chief there are six qualified reference librarians or geographers, grades GS-9 to GS-12, who spend full time on reference functions.

c. Space used by reference unit.

6 desks are used for reference people.

d. Facilities for customers.

5 additional desks are for the use of the customers.

2. Identity of customers.

Within CIA, the chief customers are DD/P and ORR;
State Department and Department of Defense also use this facility.

3. Character of requests.

a. By phone, in person, through intermediaries.

There are about 1000 requests a month.
Telephone requests exceed personal visits.
The IAC requests come through Liaison Division.

b. Types of requests.

Maps are provided; either copies or originals of maps can be made available. Analysis of maps is turned over to Geography Division/ORR.

4. Extent of research or screening done by customer in unit or by unit personnel.

The analyst is encouraged to do his own screening of maps or card catalog (by subject and area), if he so desires.

5. Evidences of duplication in terms of data available, services performed, and the like.

None

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6. Advantages or disadvantages of providing services of this unit through a single central OCR information unit.

Map Library is interested in being more centrally located so that customers will find it easier to use their facilities. However, the reference activity must be associated with the maps themselves.

Administratively, the Map Library finds it necessary to be part of ORR/Geography Division in order to work closely on the map procurement aspect which is 50% of the Map Library work.

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TTR/11--APPENDIX B-1

SELECTED RETURNS FROM QUESTIONNAIRE ON OCR INFORMATIONAL SERVICES

1. Components of DDI answering the questionnaire:

a.	[redacted]	277
b.		29
c.		90
d.		15
e.		7
f.		3
	Total	421

25X1

2. Type of position now held:

a.	Analyst, Grade 5-11	154
b.	Analyst, Grade 12 up	205
c.	Branch Chief	40
d.	Other Administration	6
e.	Other	16
	Total	421

3. Length of service in DDI:

a.	Under 6 months	9
b.	6 months but less than 1 year	17
c.	1 year but less than 2 years	44
d.	2 years or more	351
	Total	421

4. Number of times respondents use OCR informational services in a typical work month:

a.	0	19
b.	1 or 2	134
c.	3 to 5	124
d.	6 to 10	74
e.	more than 10	70
	Total	421

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5. Customer Analyst Use of Reference Services of OCR Units, FDD, and Map Library.

Questions 7-19. The customer analyst was asked to circle one or more of the methods he uses in contacting each reference unit. The total of those using the four methods thus exceeds the net total of those using each unit.

Total number of people who answered the questionnaire: 421

Number of respondents who use the MAIN LIBRARY (Question 7) — 398 or 94% of all respondents

In person	365	91%	of those using Main Library
By telephone	178	44%	
In writing	46	12%	
Indirectly	62	15%	

Number of respondents who use the INDUSTRIAL REGISTER (Question 9) — 231 or 55% of all respondents

In person	207	89%	of those using IR
By telephone	83	35%	
In writing	13	5%	
Indirectly	11	4%	

Number of respondents who use the BIOGRAPHIC REGISTER (Question 10) — 142 or 33% of all respondents

In person	81	57%	of those using BR
By telephone	80	56%	
In writing	13	9%	
Indirectly	14	9%	

Number of respondents who use the GRAPHICS REGISTER (Question 11) — 203 or 48% of all respondents

In person	137	67%	of those using GR
By telephone	99	48%	
In writing	28	13%	
Indirectly	39	19%	

Number of respondents who use the ACQUISITIONS BRANCH (Question 12) — 208 or 49% of all respondents

In person	46	22%	of those using AB
By telephone	129	60%	
In writing	46	22%	
Indirectly	60	28%	

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Number of respondents who use the FOREIGN DOCUMENTS DIVISION (Question 18)

282 or 67% of all respondents

In person	133	47%
By telephone	213	75%
In writing	66	23%
Indirectly	53	18%

(47%, 75%, 23%, 18% of those use FDD)

Number of respondents who use the MAP LIBRARY (Question 19)

276 or 65% of all respondents

In person	131	47%
By telephone	205	74%
In writing	28	10%
Indirectly	24	8%

(47%, 74%, 10%, 8% of those using Map Library)

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6. The Character of Research Assistance Preferred by Customer Analysts

Questions 27-29. The customer analyst was asked to indicate for each of the registers separately which one of the responses listed below best described his needs. Only the returns from the three major respondent offices are given.

"The staff of the Biographic Register [Industrial Register, Graphics Register] could best help me in my research on particular subjects if it:

a. Made available guides for me to use in ascertaining which part of the register I should search for information on my subject.

b. Consulted with me in using the guides to find which part of the register I should search for the information I need.

c. Searched the register and made available to me all the information pertinent to my subject.

d. Searched the register and selected from it the most important information for me to examine and use.

e. Prepared for me summaries of the material in the register on the subject in which I am interested.

f. Other (indicate)_____ (Although the number of respondents answering this part of the question are listed in the tables, the responses yield no additional data of importance. In most cases, the people selecting this response either indicated satisfaction with present procedures, a lack of understanding of the question, or infrequent use of the services.)

BIOGRAPHIC REGISTER
(Question 27)

	Number of responses	Distribution of responses											
		a.		b.		c.		d.		e.		f.	
		No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
	170	24	14	12	6	47	27	24	14	40	23	23	13
	32	2	6	1	3	11	35	4	12	6	19	8	25
	54	16	29	1	2	6	11	6	11	14	26	11	21
Total	256	42	17	14	6	64	25	34	12	60	23	42	17

25X1

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INDUSTRIAL REGISTER
(Question 28)

	Number of responses	Distribution of responses											
		a.		b.		c.		d.		e.		f.	
		No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
[redacted]	234	36	15	24	11	74	33	42	19	40	17	18	4
	26	4	15	3	11	8	31	2	7	5	19	4	15
	40	10	25	2	5	9	22	4	10	10	25	5	12
Total	300	50	17	29	10	91	30	48	16	55	18	27	9

25X1

GRAPHICS REGISTER
(Question 29)

	Number of responses	Distribution of responses											
		a.		b.		c.		d.		e.		f.	
		No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
[redacted]	200	36	18	29	14	51	25	36	18	31	15	17	8
	22	1	4	1	4	9	40	6	27	2	9	3	13
	40	10	25	-	-	9	22	8	20	12	30	1	2
Total	262	47	18	30	11	69	26	50	18	45	18	21	9

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ESTIMATE OF VOLUME OF TRAFFIC TO BE HANDLED BY A POSSIBLE CENTRALIZED SERVICE

This estimate of customer demands on the registers and the Library was made to determine whether, on the basis of volume of traffic, a case could be made for or against a single information unit. The data presented below, assuming a 25% increase in demand on the registers and a 40% increase in demand on the Library, indicate that the number of telephone requests per day will average only 109 and the number of personal visits per day will average 96. Neither of these figures, even granting considerable increases for peak loads, provides support for a very large single center for reference purposes nor for decentralization based on volume alone.

1. Biographic Register.

   A. Data

      1. 1957

         3982 Total CIA requests
         920 Other agency requests
         4902 Total

      2. 60 - 70% (av. 65%) identification

      3. 40 - 30% (av. 35%) research

      4. Most identification requests by phone

      5. Research requests are written or in person

   B. Assumptions

      1. 25% increase in demand on BR by 1961

      2. 75% of identification requests are by phone, 25% in person

      3. 50% of research requests are written, 50% in person

   C. Summary

1.	Total estimates requests	6150/yr.
2.	Identification	4000/yr.
3.	Research	2150/yr.
4.	Total phone calls	3000/yr.
5.	Average number of phone calls	12/day
6.	Total visits in person	2075/yr.
7.	Average number of visits in person	8/day

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II. Industrial Register

A. Data

1. 1957

2970 Total CIA requests
3683 Other agency requests
6653 Total

2. 15 - 20% (av. 17.5%) of requests are by phone

3. 80 - 84% (av. 82%) of requests are in person

4. 1% of requests are written

B. Assumptions

1. 25% of increase in demand on IR by 1961

C. Summary

1.	Total estimated requests	8350/yr.
2.	Total phone calls	1460/yr.
3.	Average number of phone calls	6/day
4.	Total visits in person	6850/yr.
5.	Average number of visits in person	27/day

III. Graphics Register

A. Data

1. 1957

7757 Total CIA requests
3546 Other agency requests
11,303 Total

2. 50% of requests are by phone

3. 30% of requests are written

4. 20% of requests are in person

B. Assumptions

1. 25% increase in demand on GR by 1961

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C. Summary

1. Total estimated requests	14,150/yr.
2. Total phone calls	7075/yr.
3. Average number of phone calls	30/day
4. Total visits in person	2830/yr.
5. Average number of visits in person	11/day

IV. Library (Reference)

A. Data

1. 1957

20,360 Total CIA requests
1,197 Other agency requests
21,557 Total

2. Largest number of requests are by phone

3. Almost as many requests are made in person as by phone

4. Few written requests come in. These are largely from outside customers.

B. Assumptions

1. Number of written requests equals number of outside customers.

2. 55% of CIA requests are by phone

3. 45% of CIA requests are in person

4. 40% increase in demand on Library by 1961

C. Summary

1. Total estimated requests	30,200/yr.
2. Total estimated CIA requests	28,500/yr.
3. Total phone calls	15,650/yr.
4. Average visits in person	61/day
5. Total visits in person	12,850/yr.
6. Average number of visits in person	50/day

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COMPARISON OF EXISTING OCR SPACE FOR REFERENCE PURPOSES AND SPACE PROJECTED FOR REFERENCE PURPOSES IN THE NEW BUILDING*

1. Industrial Register

Existing	New Building
960 square feet - general 417 square feet - SAC and reproduction equipment	300 square feet for SAC
Total 1,377 square feet	

2. Graphics Register

Existing	New Building
Film Branch:	
560 square feet - service unit (showing films)	1,900 square feet
170 square feet - inspection unit	250 square feet
100 square feet - editing unit	250 square feet
Total 830 square feet**	2,400 square feet**
Photographic Branch	
430 square feet - reference service	375 square feet

3. Biographic Register

Existing	New Building
No specific space assigned to customer.	No specific space assigned to customer.

4. Library - Reference

Information Section

Existing	New Building
1,150 square feet - Reading Room (utilized also for other purposes)	6,000 square feet (Reading Room) Also 400 square feet uncleared Reading Room and 38 carrels in stacks.

5. Total

Existing	New Building
3,817 square feet	9,075 square feet

*The data cover only the space allocated whole or in part to customer use.
**Available to customers, although also used by members of the branch.

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S-E-C-R-E-T

CENTRAL INTELLIGENCE AGENCY

OFFICE OF CENTRAL REFERENCE

MINICARD PROJECT TASK TEAM REPORT NO. 12 TTR/12

DATE: 25 April 1958

MEMORANDUM FOR: Assistant Director, Central Reference

SUBJECT : Final Report on Minicard Project, Task Team No. 12

25X1

1. Membership

[redacted] Deputy Chief, Document Division, CR

Acting Chief, Machine Division, CR

Chief, Business Machines Service, Management Staff

Mr. Malcolm F. Pratt, Intelligence Production Staff, OSI 25X1

[redacted] Reference Branch, CIA Library, CR

25X1

2. Methods of Task Team Operation

[redacted] Chief, Machine Division, the Chairman of this Team [redacted] drew up the outline for the report, briefed the Team on the many phases of the Minicard and other mechanical systems and assigned sections of the report to the members for drafting. We believe this report generally reflects [redacted] ideas and the recommendations he had in mind as well as the consensus of the Team. 25X1

25X1

3. Recommendations

We recommend:

a. A Minicard Pilot Operation Staff be established immediately in OCR (page 4) with the terms of reference as outlined in Appendix B. This staff should be made up of personnel from the OCR operating divisions with the Chief and key members detailed on a full time basis.

b. A pilot Minicard operation under the direction of this staff be started as soon as possible.

S-E-C-R-E-T

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c. Representatives of the OCR Registers study the Minicard System and collaborate with the staff to determine to what extent it can be used to advantage for their purposes. (See page 7)

d. Experiments be started in OCR to develop expanded concepts of coding techniques applicable to the interests of Research Offices in order to develop methods for the retrieval of information not based on preconceived concepts. Such experiments should be in line with conclusions reached by the other task groups and be directed by an OCR Planning and Management Staff. (See Part IV beginning on page 20)

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TTR/12-3

PROJECT 12, MINICARD TASK TEAM

MINICARD PROJECT

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Appendixes A - Project Outline - Minicard Project dated 25 Apr. 55
B - Suggested Terms of Reference for Minicard Operations Staff.
C-1 - Intellofax System - Input.
C-2 - Minicard System - Input.
C-3 - Retrieval - Intellofax and Minicard Systems.
D-1 - Personnel and Machine Costs for Intellofax System.
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Part I. Assignment, Conclusions and Scope of Report.

1. Assignment

The task of Project Twelve consists of determining if:

a. Minicard offers advantages over Intellofax.

b. The Minicard pilot operations have been satisfactorily planned (and to develop a current plan).

c. OCR should have a continuing high level planning and management staff to investigate new ideas.

2. Conclusions

After much discussion and investigation of the files, plans and other material pertinent to the above questions, we prepared this report and arrived at the following answers:

a. We believe that Minicard does offer many advantages over Intellofax and will substantially improve OCR's support of intelligence research.

b. A satisfactory plan for running a pilot operation for the machine aspects of the Minicard System has been developed by the Machine Division. However, we feel that OCR has been remiss in not having established a "Task Group" (as provided for in the Minicard Project Outline - see Appendix A) to run a complete pilot operation. We recommend therefore that a Minicard Pilot Operation Staff of the OAD/CR composed of a Chief and personnel from the Machine and Document Divisions and the CIA Library be organized immediately to develop policies and procedures for, and to direct the pilot Minicard operation system. This system should include the complete document processing cycle of receipt, analysis, input, retrieval and preparation of final products for the research analyst. The pilot operation should be started as soon as possible.

(Our recommended terms of reference for the proposed Minicard Pilot Operation Staff are contained in Appendix B.)

c. This group believes that OCR should have a high level planning and management staff to investigate new ideas of document receipt, dissemination, indexing and retrieval; to keep abreast of new developments in this field; and to study continually the OCR system in order to recommend changes to improve its efficiency and service to user offices. If the proposed Minicard Pilot Operation Staff were to be included as part of an OCR Management and Planning Staff, it is recommended that personnel assigned to the Minicard Pilot Operation be permitted to concentrate exclusively on that project.

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3. Scope of Report

This report compares the Intellofax and Minicard Systems; describes the present plan for "debugging" the Minicard machinery and for developing operational procedures which will make possible an orderly transition from the Intellofax to the Minicard System; recommends ways of developing the Minicard System as a more useful reference aid; and discusses the specific comments made by the Library Consultants regarding the Minicard Project. We have assumed it is not within the scope of our assignment to determine what categories of documents should be indexed, what specific information in the documents selected should be coded and what classification system(s) should be used to best support intelligence research. However, we feel that continued study and experimentation is necessary to increase the "intellectual level" of indexing, to make use of Minicard's advanced photo-electronic capabilities and must be considered by OCR as part of its over-all responsibility of improving its service to users. The importance of developing adequate codes and properly assigning such codes for indexing and retrieval purposes must be recognized. If inadequate codes are used or adequate codes are not properly applied, Minicard or any other system can only fail in meeting the needs for which it was designed.

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Part II. Comparison of Intellofax and Minicard Systems.

A. Brief Description of Two Systems.

1. Attached as Appendix C are simplified flow charts showing the significant input and retrieval steps for the two systems.

2. The Intellofax System provides bibliographic references on punched cards by specified subject and/or area to information reports filed primarily on microfilm in aperture cards. Desired reports may be viewed on microfilm in the CIA Library or paper prints of individual reports may be obtained. Printed bibliographic references to the information reports are also filed by source for cross reference and research purposes. A paper "Intellofax" tape listing bibliographic references to information reports printed from selected IBM cards and pertinent to specific subject and/or area requests is available under this system. The information reports when received are analyzed and coded in accordance with the Intelligence Subject Code (ISC) which is also used to code requests for retrieval of reports (or references) which have been processed. Only the mechanical aspects of the coding are considered within the scope of this report; the "intellectual level" of the classification process as relates to input and retrieval is being considered by other task groups.

3. The Minicard System utilizes a microphotographic medium in the form of a piece of film, 16 mm x 32 mm, called the Minicard. Alphabetic-numeric information and photographic images can be carried on the Minicard and the composite product produced in sufficient copies to permit deposit of a complete record at each significant code location. Under the system images of the actual documents are available at the same time the coded references to such documents have been selected out of file in response to requests specifying subject(s), and/or area(s), and/or other coded or previously entered clear text information. It is also planned in the Minicard System to incorporate the aperture card file and a substitute for the source card file. These two files are discussed in Part II C and II D of this report beginning on page 12.

4. The Minicard System when developed should offer many advantages over Intellofax. Some of these are:

   a. A more sophisticated searching technique. Many subjects, areas, action codes, names of persons, organizations, etc., as well as document images can be recorded in one Minicard group which will remain together in the file and permit multifaceted search procedures. Under Intellofax not only is the amount of information which can be coded into the cards greatly limited as compared to Minicard but searching for specific relationships between the various separate subject and area files by IBM collator would be an endless time-consuming task. With all the information contained in one Minicard (or two or more filed together) the desired relationships can be searched for and if indicated can be selected out immediately.

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b. Subsidiary files can be created for specific purposes as may be required depending on the type and amount of information "inputed." This suggests that as a bi-product of the Central Minicard System, a document retrieval system for the Registers (IR, BR and GR) might be developed. These possible bi-product should be considered by the Minicard Pilot Operation Staff in collaboration with the Registers.

c. Processing time for input and retrieval should be shortened and aperture and source cards would be in file for service and reference purposes in less time than under Intellofax.

d. The small size of the Minicard will reduce the volume of files to a great extent. One file block of 200,000 Minicards which is the equivalent of approximately 100,000 punched cards and their related documents will take up approximately 1½ cubic feet of space. Space consideration would no longer be paramount in determining when to retire subject and area files.

e. With Air Force, AFCIN, 1B, using the same equipment and classification system, Minicards can be inter-changed which will save the duplicate processing of each others reports.

5. Minicard has the same disadvantage as most other mechanical retrieval systems in that it is a blind system; the Minicards can be handled and selected out of file only by mechanical means. In addition the small size of the "cards" on photographic film will require rigid standards of practice to assure optimum quality of reproduction and control at all stages in the system in order to maintain accuracy of the final products.

6. The Minicard equipment is just now emerging from the development stage, and as with newly developed complex machines, there will be much "de-bugging" required and many necessary modifications to adapt the set of machines to a document "input" and "retrieval" system suitable for serving OCR's requirements. What all these modifications will be can only be determined by experimentation in a complete system pilot operation run separate from the Intellofax System. It is possible that the pilot operation will reveal deficiencies in the equipment or in the elapsed time required to process individual requests for retrieval service co-incidentally with processing a large volume of documents into the system; it also will reveal the appropriate end products which will serve the user offices and outside agencies best. The Minicard equipment has the photo-electronic potential to out-perform the IBM equipment in the Intellofax System and incidentaly it should resolve the pressing space problem. The equipment has already been purchased; some has been received and is in operation and the balance is due for delivery within two or three months. So OCR should immediately start a complete pilot operation to determine exactly what people, machines, space, training, time, classification system, methods and procedures will be required to substitute the Minicard System for the present Intellofax. The experience gained with Intellofax during the past 10 years and the relatively stable and mature organization which OCR now services should make it possible to evolve a highly efficient reference system using the Minicard equipment for raw information reports as well as for other categories of documents.

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Part II.

B. Comparison of Personnel, Machine and Space Requirements.

1. Personnel and Machine Costs.

The table below on page 10 is a comparison of the estimated costs for the Intellofax and Minicard Systems, excluding supervision and administrative expense and the cost for operations which are considered the same under either system. The identical operations are:

a. Receipt, screen, batch and disseminate.

B. Analysis and code.

c. Maintain source files.

d. Receive and code requests for machine searches.

The estimates indicate that the Minicard System would save over $75,000 in personnel costs per year while machine costs would increase by some $4,000. However, it should be noted that in arriving at the estimates for the Minicard System the following assumptions were made:

a. That under the Minicard System, it is not necessary to operate a dual system. Actually it will be necessary to maintain request service and files for the Intellofax System for at least five years after the change over to Minicard which will increase the costs for a five year period. In addition, the costs of the change over for employee training, job reclassification, procedures' development, experimentation, organizational changes and normal passive resistance to change has not been reflected in these estimates.

b. That the volume of documents and retrieval requests processed under Minicard will be the same as during 1957 for Intellofax.

c. That Air Force and CIA have developed a joint program for exchanging Minicards to save the duplicate processing of each others reports.

d. That the cost of machines is distributed over a 10 year period. It should be noted that the annual machine cost of $20,000 for preparing Intellofax tapes is for the machines which will shortly be replaced by card list cameras. Substituting these cameras will reduce the Intellofax machine costs by an estimated $18,000 per year.

e. That there is no substantial difference in the cost of materials for processing the documents between Intellofax and Minicard.

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This group feels that these estimates of the cost for Minicard System are mere "guesstimates" and that proper estimates can only be developed by a pilot operation when detailed steps and procedures can be determined realistically. Our guess at this stage is that the Minicard System when evolved should require fewer personnel to process the present volume of documents and retrieval requests, but that machine costs will be higher. We also know that the change over and a five year dual system operation is going to increase costs considerably over those for a continued operation under Intellofax. However, the possibilities of better service by OCR to its customers must be weighed against these increased costs when both have been realistically determined by the proposed Minicard Pilot Operation Staff. And as stated throughout this report, we believe the pilot operation to test the Minicard equipment in a complete system for document input and retrieval should be started immediately so that proper estimates can be developed at an early date on which to base the decision of whether to change over from Intellofax to Minicard, or continue with Intellofax.

Detailed listings of the personnel and equipment requirements are shown in Appendix D.

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COMPARISON OF COSTS

	Intellofax			Minicard		
Input	Personnel	Equip.	Total	Personnel	Machines	Total
1. Doc'ts. Recd., Screened, Batched & Copies Dissem. #	*(200,110)	-	*(200,110)	*(200,110)	-	*(200,110)
2. Copy Analyzed #	*(153,800)	-	*(153,800)	*(153,800)	-	*(153,800)
3. Multilith Mats Typed & Reproduced	69,135	1,815	70,950	-	-	-
4. Doc'ts. Microfilmed	25,270	936	26,206	18,860	8,708	27,568
5. Aperture Card Prepared	26,160	5,924	32,084	73,259	17,630	90,889
6. Cards Made & Filed by Subj. & Area	32,301	13,344	45,645			
Retrieval						
7. Code Request #	*(11,000)	-	*(11,000)	*(11,000)	-	*(11,000)
8. Control & Machine Requests	31,307	9,332	40,639	27,400	14,828	42,228
9. Prepare Intellofax Tape or Print Minicards	5,440	20,000	25,440	3,670	2,082	5,752
10. Maintain Aperture File (Service Requests)	25,590	2,474	28,064	11,010	3,560	14,570
11. Maintain Source File	*(10,500)	-	*(10,500)	*(10,500)	-	*(10,500)
Machine Maintenance						
12. Maintenance of Equipment	16,320	751	17,071	19,400	11,000	30,400
TOTAL (Excl. 1, 2, 7 & 11)	231,523	54,576	286,099	153,599	57,808	211,407

Amounts taken from Report prepared by Management Staff for Library Consultants.

* Assume same operation under each system - omitted from totals.

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2. Comparison of Space Requirements.

The space needed for the files under Minicard as compared to the present Intellofax System will be greatly reduced and the space required for typing multilith mats and their reproduction will be entirely eliminated. The following estimates show that some 3,500 square feet of space less will be needed by Minicard than for Intellofax, assuming that Intellofax has been completely phased out of all operations:

Operation Involved	Space Requirements Sq. Ft.	
	Intellofax	Minicard
1. Receipt, Screen, Batch, Disseminate	(same)	(same)
2. Analyze and Code	(same)	(same)
3. Type and Reproduce Mat	1,105	-
4. Camera Room	400	434
5. Mount Film in Aperture Cards	150	150
6. Code Requests by Library	(same)	(same)
7. Machine Control Section	880	110
8. IBM Key Punch Section	450	300
9. IBM Tab Section	550	320
10. Make Intellofax Tapes or Print Minicards	648	373
11. Process Film (all phases)	534	
12. Maintain Aperture Card File	700	600
13. Subject and Area Files	455	22
14. Maintain Source Card Files	(same)	(same)
TOTAL	5,872	2,309

This group believes that a Minicard System operation should result in a large saving of space over Intellofax, but the probable extent will have to be estimated as a result of the pilot system operation which has been recommended.

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Part II.

C. Discussion of "Source" Files.

1. The present source file maintained under Intellofax in the Library consists of 3 x 5 cards, each representing a single document and containing specific bibliographic information which includes control number, source, post, report number, date, classification, title, pagination and enclosure data. Arrangements are by source, post and report number, or, when this is not applicable, by some other logical scheme. The file is used more than 800 times a week for the following purposes: (a) to check for receipt of a specific document, (b) to obtain control numbers, (c) to verify bibliographic information, (d) to record data on security reclassification, (e) to make searches of reports from a single post. The CIA Library estimates that the file is referred to 40% of the time to determine control numbers; 50% to obtain enclosure information and 10% for other purposes.

2. It would seem that a cross reference index made from the punched cards used for input processing together with the aperture card file would answer over 90% of the inquiries made on the present "source" file. Less than 10% of the inquiries consist of browsing through the source file to identify reports for which specific references are not known.

3. Some of the possibilities for a "source" file in the Minicard System are as follows:

   a. The first is to make the production of source cards an automatic process and provide them as a product of the Minicard System. A photograph of the upper third of each document would be reproduced on a 3 x 5 card of heavy paper stock suitable for filing. It would contain all of the information now typed on a source card except for pagination and enclosure information. Some scheme for adding this data would have to be devised; and provision would be made for handling studies or other materials whose format does not conform to the serial intelligence report. There are certain advantages to this scheme: it would be essentially an automatic operation, it would be rapid, with cards available for filing within three days (as compared to seven work days under the Intellofax System) after initial receipt of the document; and the cards produced would conform in size and information with those in the present file. (An image Minicard could be inserted into the source card as an added step which would make the whole document immediately available for viewing or for obtaining a copy.)

   b. A second suggestion would be to maintain a hard copy file of the first pages of each document received, annotated to supply information on enclosures or other data and arranged by source, post and report number. This would constitute a file of the same information now available on each source card; it would be sorted, filed and used

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in the same manner as the present file. However, the first pages would vary in size, a new set of cabinets for filing would be required and a completely new file would result. Additional first pages or additional copies of all incoming documents would have to be obtained, or copies of the first page would have to be reproduced by OCR for this purpose. The obvious advantage would be the immediate availability of the "source" information in file upon receipt of the document.

c. A third possibility is a file of Aperture cards containing image Minicards of the documents organized by locator and document report numbers printed out (interpreted) at the top of each card. This system would require more detailed coding of source locator data by analysts than is presently being done. With this type of file to determine information not printed on the card, such as the title of the document, the number of enclosures, or the classification, it would be necessary to remove the card from file and read the image on a Minicard viewer making the whole process of using the file a slow one. Filing of the cards would be uncomplicated, but needed processing time in the Machine Division would delay their receipt by the Library.

d. A fourth possibility would be to furnish interpreted IBM cards showing the control number, source and report date for the "regular" information reports and continue one of the above "source" files for the "non regular" or that category of reports which require a source file. These "non regular" reports would include [redacted] Finished Intelligence Studies and similar material now intellofaxed which are difficult to identify without a source file. It would of course be necessary to identify these items at the "input" stage and separately process them through the system so they would not be intermixed with the "regular" items. 25X1 25X1

e. The last possibility and least costly for "input" would be to provide for a "block file" of 3N Minicards filed by source. This file could be used to furnish either prints or Minicard copy (strip film or cut) of desired segments of the file. This however would be a completely blind file and could be used only after machine selection of specified segments and either reproduction of film or paper prints.

4. The group feels that a combination of (a) and (d) above would be the most efficient, but that final determination should be made as a result of experimentation and experience gained in the Minicard Pilot Operation.

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Part II.

D. Discussion of "Aperture Card" File.

1. Under Intellofax the images of reports are contained in aperture cards filed by document control number. This file located in the CIA Library is used for reproducing copies of specified documents requested by CIA or outside offices or for viewing by individuals for reference purposes. An estimated 6,000 copies are reproduced from this file each month. It is also estimated that about 1/3 of these requests result from the Intellofax tape service. Inasmuch as images of the documents are available in the Minicard System when the selection operation has been completed, it can be assumed that the requests for copies of specific documents under Minicard will be reduced by at least 1/3.

2. If duplicate Minicards are filed in report number order in a block file, requests for copies of specific documents would have to be grouped in order to process them efficiently; an urgent request for a copy of one document would require mechanical selection; duplication and processing on the same equipment being used for the regular "input" and "retrieval" service. In addition, individual document images would not be immediately available for viewing as is now possible with the Intellofax aperture card file.

3. Because the Intellofax manual file of aperture cards has proved to be very efficient in servicing requests for copies of specific documents which have been included therein, this group believes that the Minicard System must provide the same type of service and has included such a file in the current plan.

4. It is possible that equipment could be developed which would efficiently furnish copies of specifically desired documents and make obsolete the manually operated aperture card file. However, that will have to be determined by the Minicard Pilot Operation Staff when such equipment is available.

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Part II.

E. Discussion of Product Available to the User.

1. The Intellofax System provides the following products to the end user for the documents processed in the System. (See Appendix C 3.)

   a. Bibliographic data for each document indexed is printed on its index (IBM) cards which are in the various subject and area files. Cards are selected out of these files in response to a request for references to reports which contain certain specified information. The bibliographic data for the selected group of cards is reproduced on an Intellofax "tape" which is given to the requester. In lieu of a tape, the requester may review the selected group of cards to determine the specific documents he needs. The desired documents may be obtained on microfilm or in hard copy as outlined in (c) below.

   b. A duplicate "unpunched" index card showing the printed bibliographic data for each document is cut down to 3" x 5" size and put into the Source File. This file arranged by source, or post number, etc. can be reviewed manually to identify reports or to obtain cross-reference, enclosure, security and other of the bibliographic data.

   c. Documents are microfilmed and the images are mounted in an aperture card. These cards are filed in document number order. The document image of a specified document may be viewed in the aperture card on a Microfilm viewer or a photostat copy of it can be obtained. If the document has not been processed into an aperture card because of odd size, bulk or poor copy, it may be viewed on 35mm film or access given to hard copy. If the image is on 35mm film, a copy can be furnished. If only the hard copy is available, it may be borrowed.

2. The Minicard System is presently planned to provide the following products for those documents which have been selected for processing: (See Appendix C 3.)

   a. A "stick" of duplicate image 3N - Minicards is available by selection for those documents indexed into the system which contain information pertinent to an individual requirement for specified subject and area or subjects and areas as well as other "coded" information such as clear text entries. This "stick" of Minicards may be viewed by the requester in the Analysis Viewer and he may indicate the documents or individual pages for which copies are desired. The "stick" of Minicards is then processed by the enlarger-print machine and photostat copies of the desired documents are reproduced and handed to the requester. In lieu of the "stick" of duplicate image Minicards, the requester may receive microfilm copies on strips or on actifilm for viewing on a "reader" or a "reader-printer" machine, or he may receive prints of first pages or of the complete document. If the document has not been photographed on the Minicard because of odd size, bulk or poor copy, it may be viewed on 35mm film or access given to hard copy. If the image is on 35mm film it may be viewed or a photostat copy obtained. If only the hard copy is available, it may be borrowed.

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b. A Source File, in place of the bibliographic 3 x 5 cards under the Intellofax System, containing copies of the first pages (or the top 1/3 of the first page) on 3 x 5 heavy paper stock are filed according to source.

c. An Aperture Card File containing the image Minicard(s) will be available in a manual file under the Minicard System and be used in the same manner as in Intellofax.

3. More varied products are available to the user under the Minicard System to satisfy his unique needs and when considered with the higher selective capability of the Minicard selector, the relatively fewer end items which must be reviewed by the user should save valuable research time.

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Part III. Present Plan for the Minicard System.

The current plan for installing the Minicard System which will eventually supplant the Intellofax System consists of (1) a complete mechanical test of all the equipment, (2) the establishment of a pilot Minicard operation and the development of standard operating procedures, and (3) the phasing out of the Intellofax System into the Minicard operation.

A. Mechanical Test of Equipment.

1. When all the Minicard equipment has been delivered, installed and operating (see Appendix E for an itemized listing of equipment delivered and on order), a three month's test using all the "hardware" will be made to ensure that all information (and more) in the Intellofax System for a selected group of reports is efficiently retrievable and can be made available to users in a suitable form.

2. In order to have a large enough group of "Minicards" for this purpose, the Machine Division since August 1957 (when the Minicard Camera began operating) has been photographing codes and the related documents for about 60-70% of the CIA information reports being processed into the Intellofax System. The test at the present time is limited to processing master Minicards into the "block" file because the equipment for further processing has not yet been delivered. There were an estimated 13,000 master Minicards in file as of 1 April 1958. Approximately 100 master cards are being added each working day. The codes on these cards were mechanically converted from IBM cards in the Intellofax System so it will be possible to make detailed comparisons between the two systems for the group of reports involved. It is interesting to note that the mechanical conversion from IBM cards to Flexowriter tape was made possible by the new Flexowriter IBM 024 Key Punch Combination which was specifically developed and built for the Machine Division. This machine makes it possible to process the code "input" into the Minicard System in a more orderly and efficient manner than was originally planned for a Minicard operation. Instead of using short lengths of Flexowriter tape for each individual document and splicing them together in the same order as the batch of documents to be photographed, IBM cards are punched, verified and sorted into the desired order and the codes are converted to a continuous tape for a specified group. This permits group processing and practically eliminates all coding transcription errors.

B. Pilot Minicard Operation.

1. Coincidentally with the mechanical test of the equipment, a Pilot Minicard Operation (see Appendix A, Minicard Project Outline, on page 6) is planned to run separate from and in addition to the Intellofax operation using a selected portion of the daily receipts of information reports. It is suggested that the 00-B series of reports (about 75 per day) be selected for processing for the pilot operation. The operation will be used as a means of developing policies and procedures for analysis, input, processing and retrieval. It should be under the direction of the proposed Minicard Pilot Operation staff of the OAD/CR

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composed of a full time Chief and personnel from the Document and Machine Division, the CIA Library and, if required, the OCR Registers. the Chief and key personnel of this staff should be relieved of other duties so they may devote full time to the development and direction of the pilot system. This staff should keep the AD/CR and the CR Division Chiefs completely up-to-date on all plans and procedures as they are being developed, so that complete OCR coordination will be effected. The personnel necessary to operate the pilot system should be assigned to the project by the operating divisions either on a full time or part time basis as required.

2. Although the Minicard duplicator, selector, sorter and enlarger-print processor have not been delivered, the "input" phase for this pilot operation should be started immediately so that a file of Minicards can be created which will be large enough for proper testing purposes. This will require the establishment of the Minicard Operation Staff, the writing of specific terms of reference, the designation of a Chief and the assignment of required personnel.

3. The input for the pilot operation will contain the following data additional to that now contained in Intellofax cards:

   a. New area codes

   b. Action codes - new

   c. Phrase coding

   d. Clear text entries.

   Action codes, phrase coding and clear text entries will provide for the retrieval of information more specifically and in greater depth than is now possible under the Intellofax System. Briefly, this will be the first step toward the establishment of the more sophisticated system made possible by the Minicard method. Furthermore, the pilot operation input will become a permanent part of the file.

4. As the pilot operation is being conducted, the inherent potential of the Minicard method will become better known. This knowledge will suggest a greater usefulness of the equipment. It will become apparent that the greater flexibility in machine language input of the Minicard will permit the consideration of new methods of indexing and retrieval of information. It is assumed that problems of information retrieval posed by researchers and the OCR specialized registers will be submitted to the Minicard Operation Staff. This staff will study the problem in the light of their newly acquired knowledge of Minicard potential and will recommend project studies or changes in input data to solve such problems. This work will start as soon as sufficient knowledge of the Minicard potential has been gained and will be conducted concurrently with the pilot operation.

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5. During the pilot operation specific operating practices will be developed and standard operating procedures will be written. These procedures will have to cover the entire input, operating and retrieval aspects.

C. Phase Out of Intellofax System.

As stated above, the initial input into the pilot operation will consist of approximately 75 CIA 00-B Information Reports a day. As soon as this operation has been "debugged" and maintenance and operating procedures have been finally determined the entire Minicard operation will be turned over to the operating divisions and the Intellofax operation for this group of reports will be discontinued. From this point on, other types of CIA reports and other categories of information reports will be introduced into the Minicard System. Simultaneously, the related Intellofax operations for such categories will be discontinued and the personnel now typing, photographing and inserting microfilm into aperture cards will become available for reassignment to Minicard or other operations. The speed with which this phasing out can be accomplished will depend on how fast personnel can be trained by the operating divisions in Minicard operations and procedures.

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Part IV. Development of Full Potential of Minicard.

1. A previous section entitled "Pilot Minicard Operation" discusses certain limited and relatively immediate steps which can be taken to make more effective the retrieval of information from the Minicard storage system than is now possible from the Intellofax. However, these represent no fundamental change in present coding operations although they will provide for simple correlations between fixed classification and/or action codes. Descriptor terms in plain language will support the formal coding. Whereas the final outcome of this study will in all probability enhance the pertinency and the amount of material retrieved in response to a specific search requirement, it can at best make use of only a small fraction of the retrieval potentialities built into the logical and discriminatory electronic circuits of the Minicard selector. Also it can obviate only to a small degree a basic limitation of any system, mechanical or otherwise, that employs conventional classification practices, namely: that because the processing of information into such a system involves a predetermination of the concepts within the information by which the user will subsequently wish to retrieve, any recall of the information is strictly limited by the decisions as to the indexing entries which are made at the time of processing.

2. In recognition of this basic fact, the Agency some years ago sponsored external research and performed supplementary research internally which went far to develop certain expanded concepts of indexing and classification for use with electronic data-searching machines of the nature of the Minicard selector. This research gave insight into the intriguing possibilities of establishing and monitoring by machine searching obscure correlations of bits of information, the relation of which was not apparent, in fact, often not perceivable at the time information was processed into the system. It showed also the practicality of increasing the capacity of an information storage system to provide essentially unlimited correlations between personalities, institutes, specific subject areas and prescribed action concepts.

3. Since this research was completed there has been no machine available to the Agency with the logical discriminating electronic circuits to permit a quantitative assessment of the exact degree of improvement that would result or the operational changes that would be involved in the application of these expanded indexing concepts to intelligence documents or other types of information.

4. It is believed highly important that a part of the contemplated pilot plant development operation be designed to make such an evaluation in line with the conclusions reached by other task groups and under the direction of an OCR Planning and Management Staff. Specifically it is proposed that:

   a. A further limited research effort be undertaken at once on a limited and homogeneous segment of intelligence documents that will apply to these expanded and radically different concepts of classifying, coding and indexing, often referred to as multi-dimensional coding. Such an experiment would provide the factual data that must be at hand before policy decisions can possibly be made as to the feasibility and desirability of adoption.

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b. The efforts should be directed in part to the intellectual problem concerned with the ~~semantic~~ and generic relationships in the language of the test set of documents. It should also determine the degree of specificity which needs to pertain in the processing of the information for machine searching. It would measure the improvement that would result in the pertinency in the information recovered in response to detailed search requirements and clearly define the operations involved in processing and retrieving.

5. Whereas this recommended limited phase of the work need not extend the specific coding methodology developed in the prior research and since then considerably expanded by certain private interests, it is virtually certain that the desired factual material can be obtained most readily by doing so.

6. It is visualized that this development work would be done partly under external contract and partly through close cooperation between task forces within using offices of the Agency and the Minicard System operational personnel.

7. Supplementary development projects which would add to the information provided by this proposed project should also be undertaken. There could be made available to the Agency material which has been coded by these expanded indexing concepts in two areas: (1) purely scientific, comprising coded abstracts for the world metallurgical literature for the past year or so; and (2) material of a news nature which was prepared for the purpose of supporting research in the production of what might be termed industrial intelligence. Should evaluation of material retrieved by the Minicard selector from both types of encoded material under a planned program of search requirements be undertaken relatively soon, the results could be expected to influence the direction of the principal project first discussed.

8. It has already been stated that the Minicard System is capable of providing essentially unlimited correlations by personalities, institutes, specific subject areas and prescribed action concepts. Hence, the impact of such a possibility on the operations of the Biographic and Industrial Registers as now practiced is extremely important in any complete evaluation of the Minicard System. It seems to us, therefore, that concurrently with the experiments already proposed similar limited experiments selected from segments of material handled by both Registers should be undertaken.

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Part V. Discussion of Consultant's Comments on Minicard.

1. Consultant's Report XI 4:

> "Present planning for Minicard offers no solution to the present low intellectual level of Intellofax. It is identical also in the large number of false sorts that will result, and will tie the analyst to a reading machine to get even the titles of the documents included in the batch sent to him. This will cost more of the analyst's time."

We believe the "intellectual level" of any indexing-retrieval system whether it be manual, Intellofax, Minicard or any other, is determined by document selection, the classification code and its application, rather than by the equipment used. As stated in the beginning of this report on page 5, we believe it highly essential to determine what categories of documents should be indexed, what specific information in the documents selected should be coded and what classification system(s) should be used to best support intelligence research. However, these matters which determine the "intellectual level" of a system are considered outside the scope of this report. Given the same input as Intellofax, we believe Minicard will give more selective search results and greater choice of form of end product with less elapsed time. Minicard will not "tie the analyst to a reading machine to get even titles of the documents" if he does not so desire; he should receive fewer documents or images to view which are not pertinent to his search due to the greater selectivity of the Minicard equipment.

2. Consultant's Report XXXI 58:

> "Minicard appears to offer some definite advantages over Intellofax in terms of the storage and reproduction of materials but it is currently being considered on the same intellectual level as Intellofax. The system has not been studied fully and it is not possible to predict that it will make any great improvement in the program efficiency of the Agency in the whole information retrieval cycle."

The first part of this comment relative to "the intellectual level" was discussed in paragraph (1) above. Regarding the balance of the comment, we believe that the Minicard System has not only "the advantage over Intellofax in terms of the storage and reproduction of materials", but has the potential of increasing the efficiency of the retrieval of information contained in the reports and documents processed into the system. A realistic estimate of the increased efficiency will have to await the results of the pilot operation. We believe that the Minicard System when evolved will result in a great improvement in the retrieval of information over the present Intellofax System. (See Part II beginning on page 6.)

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3. Consultant's Report page 140-141:

(a) "Development of the Minicard machine is still in process and no one as yet has a complete set of the machines. It should be noted, however, that there has been no study of the Minicard System in terms of manpower required, the number of machines required, the amount of retrieval that can be handled per installation, the intellectual level that can be achieved through the Minicard System, or any of the other basic data that should be obtained."

Although a complete set of machines has not yet been delivered, we agree with the Consultant's that a complete systems study should be made. Accordingly we have recommended that a Minicard Operation Staff be established to evolve a complete system pilot operation and determine the requirements, capabilities and potential of the Minicard System. We do not believe such a study is possible otherwise. OCR has been remiss in not having established this staff as proposed in the Minicard Project Outline. (See Appendix A, page 6).

(b) "As it stands, under the best of conditions, it will be a year and a half after the camera is delivered before anybody has any idea whether this system will give the Agency anything that it does not now have or could not have better by means of other types of bibliographic tools."

The group is concerned with Minicard as compared to Intellofax and has not studied "other types of bibliographic tools". As stated throughout our report, we believe that Minicard will have advantages over Intellofax.

(c) "The Assistant Director/OCR was asked on 9 May 1957 whether there was a staff paper or a formal report evaluating the gains anticipated from the Minicard System. He said that there had been no such report but there had been a good deal of staff thinking about it. He referred the Consultant's to the head of the Machine Division for information about the anticipated operation of the system."

"The conference with the Head of the Machine Division on 9 May indicated that no working paper had been prepared and that the only thing that had been put down on paper on this proposal was a preliminary staff study to get funds for the program, but that was, in his judgment, to general to justify study."

The above comments and those which followed on pages 141,2 of their report were made to illustrate the Constultants' opinion that OCR failed "to follow through on planning of projects." This group being only concerned with the

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Minicard Project has stated above that OCR was tardy in establishing a Staff to follow through with the Minicard project. However, it should be noted that the "preliminary staff study", mentioned above by the Consultant's, provided on page 6 (see Appendix A) for a task group "to operate a full line of Minicard equipment paralleled to but separate from its Intellofax program." It was further provided that "since a parallel set of equipment will be available in Air Force, the two agencies will establish a joint program for Minicard processing of their respective document production during the test period."

4. Consultant's Report page 142:

> "It is quite possible that with proper planning, the Minicard System can be used for part of the storage and retrieval job. In the present state of the art, it does not appear that the Minicard System will solve any of the urgent problems of speed and quality of service outlined above. A great deal of high-level study and planning needs to be undertaken to determine the areas in which this tool can be used effectively, rather than plunging into it as a solution for intellectual problems which have not been approached at all in the preparation for the installation of Minicard."

We believe that not only can Minicard be used to advantage for part of the storage and retrieval job, but that it will also solve many of "the urgent problems of speed and quality of service." We agree that a lot of planning, coordinating, testing and experimentation needs to be undertaken "to determine the areas in which this tool can be used effectively."

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TTR/12--APPENDIX A

25 April 1955

MEMORANDUM FOR: Project Review Committee

THROUGH : Deputy Director/Intelligence

SUBJECT : MINICARD Project

Transmitted herewith is a "Project Outline" which recommends the purchase under contract of MINICARD equipment from the Eastman Kodak Company at an estimated cost not to exceed $330,000.

/s/
James M. Andrews
Assistant Director
Collection & Dissemination

CONCURRENCE:

_____
Chief, Management Staff

_____
Date

ACTION BY APPROVING AUTHORITY:

APPROVED*

_____

_____
Deputy Director/Intelligence

*Funds are available to finance the proposed project within the DD/I allocation for the current fiscal year. Proposed contracting arrangements have been coordinated with [redacted] Chief, Procurement Division.

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PROJECT OUTLINE

25 April 1955

Subject:	MINICARD Project 25X1
Originating Division:	Machine Division and CIA Library, OCD
Project Officers:	
Type of Project:	Purchase and testing of equipment designed to improve OCD's present Intellofax system.
Financial Mechanism:	25X1
Funds Requested:	Not to exceed $330,000 in fiscal year 1955.
Current Status:	New.

C-O-N-F-I-D-E-N-T-I-A-L

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1. OBJECTIVE:

To conduct in OCD an early and large-scale test of a family of data handling equipment known as MINICARD which is believed capable of substantially improving CIA's Intellofax System as a principal instrument in support of intelligence research. MINICARD promises to contribute improved means for collation of intelligence data, greater speed and flexibility in the conduct of document searches and economies in operation, notably spacewise.

2. ORIGIN AND POLICY GUIDANCE:

Under CIA Regulation [redacted] OCD is assigned the following functions: 25X1

a. Design, develop, and operate such central reference facilities as will ensure that the content of all available intelligence materials is immediately accessible to all offices of the Agency in support of intelligence production; and

b. In collaboration with the Management Staff, conduct research into, and advise Agency components upon, the application of machine techniques and special devices to problems of information control and bibliographic research.

3. SITUATION:

a. Advent of MINICARD

The Eastman Kodak Company has developed an information storage and retrieval system utilizing the microphotographic medium in the form of a piece of film, 16mm x 32mm, called the MINICARD. Alphabetic-numeric information and photographic images can be carried on the MINICARD and the composite product produced in sufficient copies to permit deposit of a complete record at each significant code location. The system makes available the advantages of discrete item control, multiple access, the flexibility of electronic searching techniques and the permanence and inviolability of film storage. A comprehensive search-equipment system is now mid-way in development. It includes various types of apparatus for handling, storing, sorting, and delivery of MINICARD data to researchers. Selection from very large numbers of MINICARDS is to be facilitated by pre-sorting and storage of the MINICARDS into as many groups as necessary in order to keep the searching time to an acceptable minimum.

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b. Status of the CIA Intellofax System

The principle features of MINICARD are paralleled by and, to a considerable extent, derived from present document handling techniques evolved since 1947 in CIA's Intellofax System. The latter comprises an Intelligence Subject Code which is immediately applicable to MINICARD; a full range of IBM equipment for storage and retrieval of document subject codes on punched cards; facsimile equipment for production of intellofax "tapes" listing document citations for researchers; facilities for storage on and retrieval of documents from film; and, finally, a Library Reference system employing personnel trained in the utilization of the composite system on CIA and IAC research projects.

MINICARD proposes to combine the storage of subject codes and document images now handled separately under Intellofax. It eliminates storage problems now critical in the punched card and hard-copy document phases of Intellofax by taking fullest advantage of new developments in electronics and in film production and use. Finally, from these new developments it expects to achieve urgently needed processing and retrieval rates many times faster than the best of which Intellofax is capable today.

The urgency of the storage, retrieval, and cost problems facing Intellofax in the immediate future cannot be overemphasized. Its growth to present scale has been accomplished by multiplication of IBM equipment rentals, storage cabinets, space units and personnel. Though declining, researchers' requests for total searches of the seven year Intellofax product still amount to 60% of the flow. Compliance with these requests in categories now numbering tens of thousands of cards is inevitably lengthening search time, multiplying overlap problems and overloading users with insufficiently refined answers. During the past two years the possibilities for solution by multiplication have generally disappeared, particularly in the categories of space and personnel. Until permanent relief can be achieved along lines incorporated in MINICARD, OCD has no alternative but to gradually reduce the range, speed, and quality of the Intellofax Service.

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d. Anticipated results

CIA hopes to see realized from MINICARD:

(1) an IAC program for comprehensive one-time processing of incoming intelligence reports.

(2) a common IAC storage and data retrieval system using a common subject classification scheme, identical equipment and operating procedures, an inviolate subject code record and an inviolate document storage facility.

(3) an improved reference service for IAC researchers built on tested features of Intellofax but amplified in key respects, particularly, retrieval for the researcher of source data according to subject associations, prompt access (50% - 75% faster via MINICARD compared with 1-16 hours via Intellofax), and essentially simultaneous processing of overlapping requests.

(4) economies in operations: (a) The dollar value of access to relevant source materials for analysts is not easily measured. From the OCD point of view, faster service would yield benefits of great value to intelligence at much reduced cost, (b) MINICARD eliminates present-day space considerations. It would allow a million documents with all index references to be stored in the space occupied by a legal size safe file.

e. Evaluation

See paragraph 5B, Sub-proposals or "tasks".

f. Policy questions. NA

g. Congress. NA

h. Extra-Agency action

There are no CIA facilities for developing and constructing the type of equipment needed.

i. Proprietary companies. NA

j. Special considerations. NA

k. Liquidation. NA

ANNEXES:
Tab A - Equipment Costs
Tab B - Comparison of Space Requirements

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C
O
P
Y

MINICARD EQUIPMENT
TO BE PURCHASED FROM
EASTMAN KODAK COMPANY

Item	Function	Cost
4 Flexowriters	Electric typewriters which also perforate a paper tape simultaneous with the typing operation. Document classification codes determined by the document analyst are recorded in the paper tape which is similar to a teletype tape.	$10,000
1 Camera	Records on film the code carried in the perforated paper tape together with an image of the document to which the tape relates.	16,000
1 Processor	Chemically develops, fixes, washes, and dries Minicard microfilm.	10,000
1 Chopper	Cuts reel film into individual Minicards.	6,000
1 Duplicator	Duplicates entire Minicard, and at the same time automatically transfers selected code data to a fixed sorting and selection position on the duplicate Minicard.	53,000
1 Filing Sorter	Operating at high speed, arranges cards and automatically files them in proper sequence.	35,000
1 Selector	Selects as many as 20, six letter or digit code words in one pass of Minicards through the machine. This permits a high degree of document selectivity at high speeds.	70,000
8 Viewers	Desk type microfilm viewer which enlarges the film image to a readable size. It has a device to identify frames which require reproduction.	16,000
1 Enlarger	Automatically prints enlarged copies of Minicard document images.	25,000

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Item	Function	Cost
Miscellaneous Equipment	Includes Minicard manual handling devices, file cabinets, inspection viewers, etc.	$20,000
Installation and systems		10,000
		$271,000
Administrative 3%		8,130
		279,130
Fee 7%		19,540
		298,670
*Contingency 10%		29,330
	TOTAL	$328,000

*To allow for variation in equipment costs. The figures listed are not absolute.

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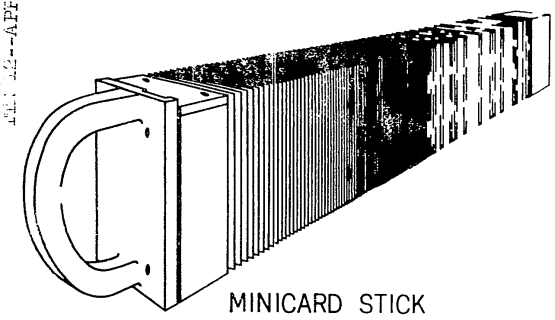
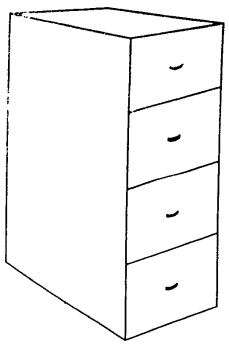
STORAGE

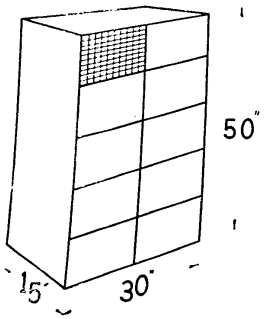


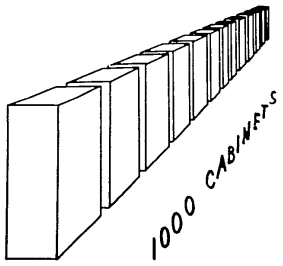
MINICARD STICK

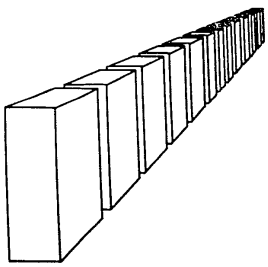
EQUIVALENT TO
ONE FILE HARD
COPY DOCUMENTS



ONE FILE MINICARD STICKS EQUIVALENT TO ONE MILLION DOCUMENTS AND FOUR MILLION TABULATING CARDS







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Suggested Terms of Reference for Minicard Operation Staff

1. Mission

To plan and direct the Pilot Minicard System operation for the development of policies and procedures required for the establishment of a complete processing system using Minicard equipment for the receipt, dissemination, recording, indexing and retrieval of intelligence documents to supplant the present Intellofax System.

2. Functions

a. Determine specific requirements to begin initial phase and subsequent phases of the Pilot operation.

b. Establish target dates for each phase.

c. Submit monthly progress reports to AD/CR.

d. Arrange for necessary personnel.

e. Determine general requirements for specific files, extent of indexing, and for servicing requesters. These general requirements should be coordinated with user offices and be approved by AD/CR.

f. Investigate new ideas of document indexing and retrieval which may utilize the full potential of the Minicard Method.

g. Write standard operating procedures for all phases of the Minicard System, including receipt, selection, dissemination, indexing, processing, searching and retrieval.

h. Develop specific programs for training OCR personnel in the Minicard System so that the Intellofax System can be phased out without interruption in OCR services.

i. Coordinate operation with Air Force (AFCIN-1B) so as to prevent any needless duplication in processing each other's documents.

j. Determine whether the Minicard System can be adapted for use by the OCR specialized registers (IR, BR, GR, SR).

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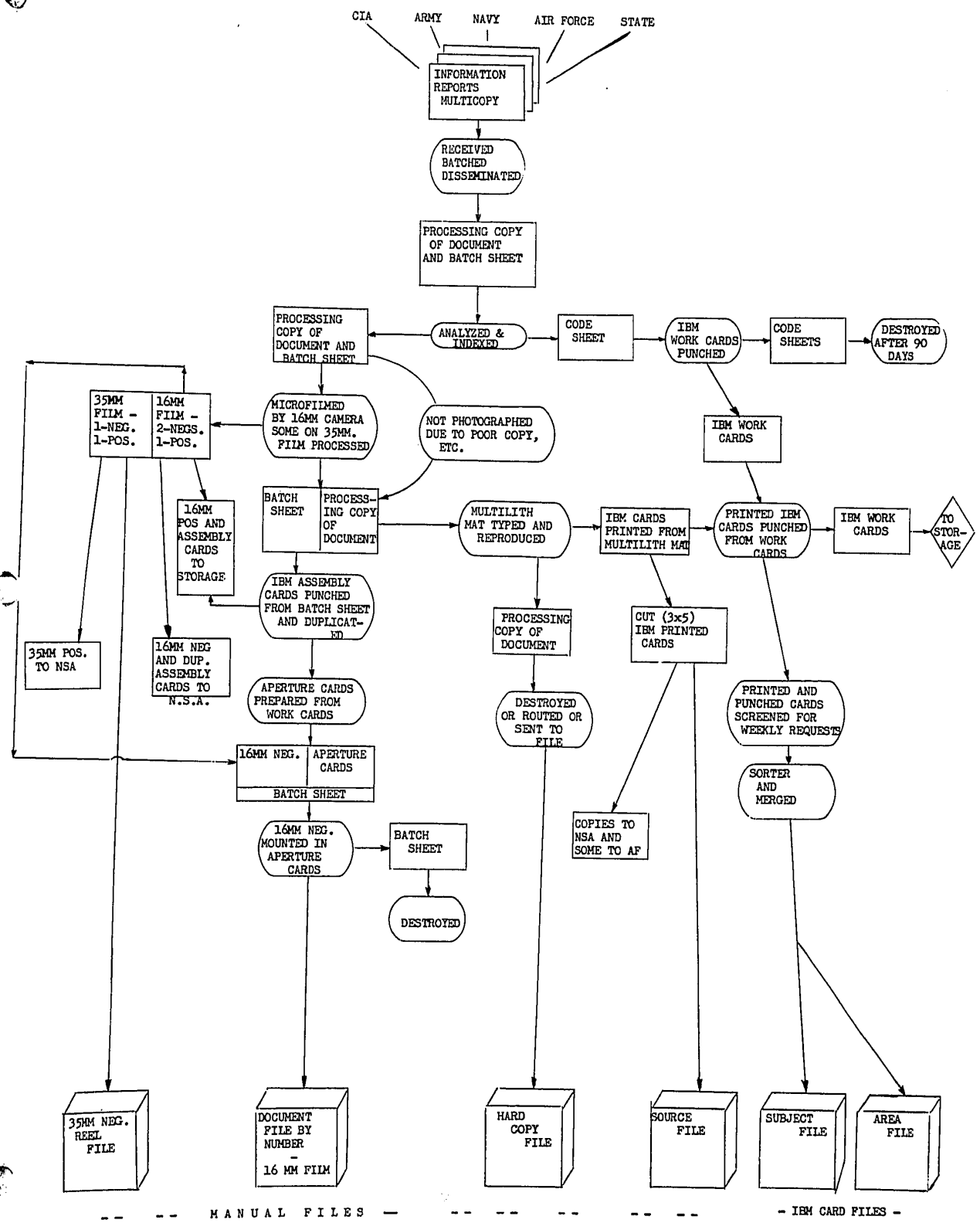
INTELLOFAX SYSTEM INPUT



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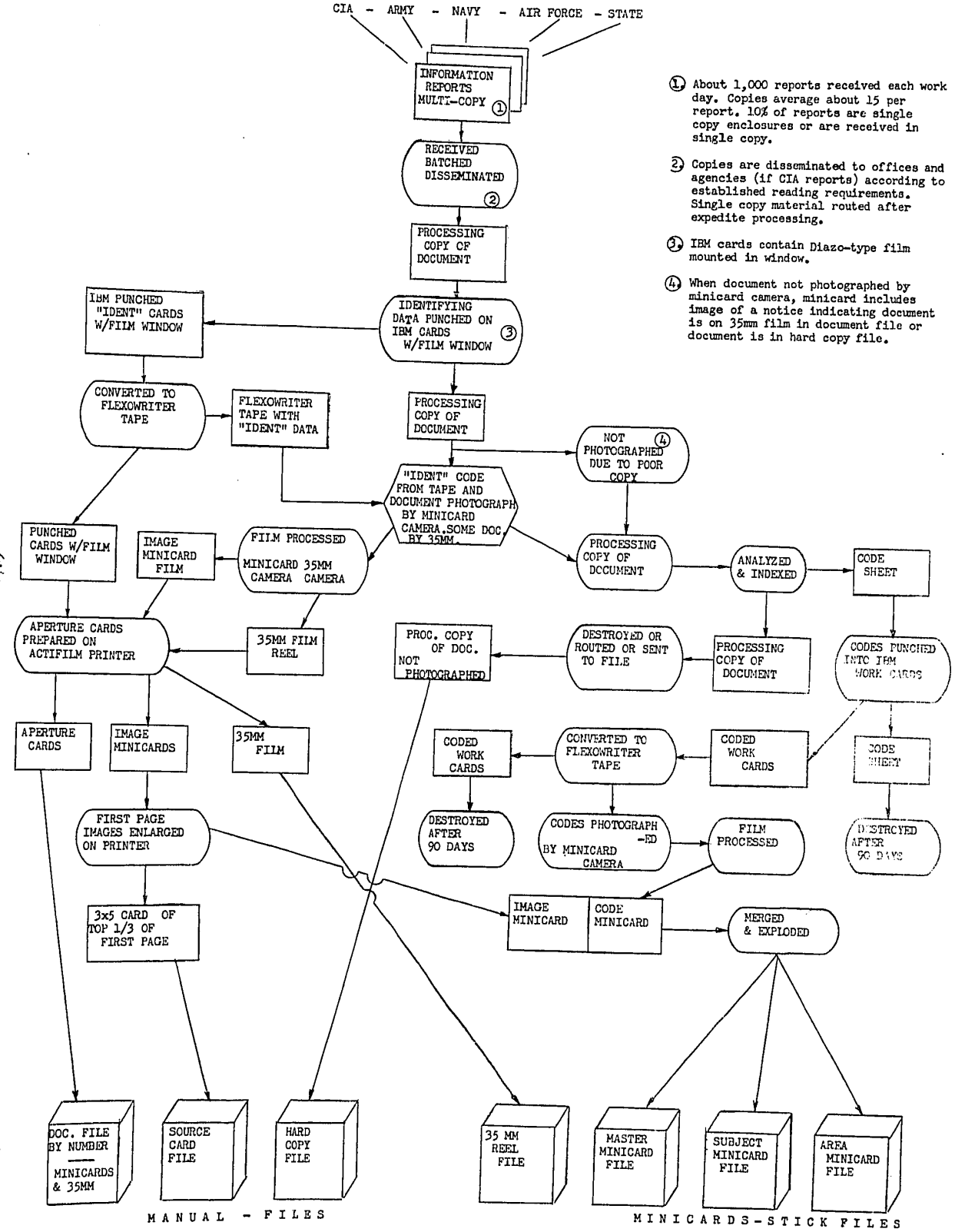
SECRET

MINICARD SYSTEM INPUT

TTH/12--EXHIBIT C-2



① About 1,000 reports received each work day. Copies average about 15 per report. 10% of reports are single copy enclosures or are received in single copy.

② Copies are disseminated to offices and agencies (if CIA reports) according to established reading requirements. Single copy material routed after expedite processing.

③ IBM cards contain Diazo-type film mounted in window.

④ When document not photographed by minicard camera, minicard includes image of a notice indicating document is on 35mm film in document file or document is in hard copy file.

SECRET

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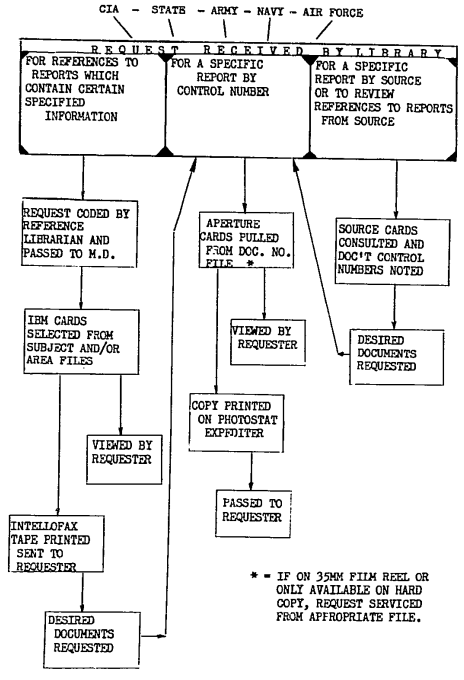
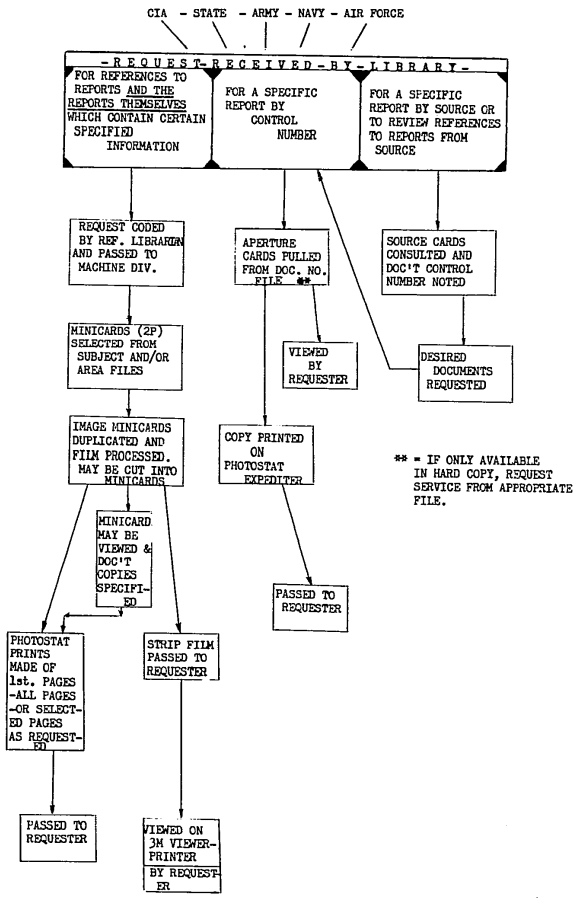
INTELLOFAX SYSTEM - RETRIEVAL



MINICARD SYSTEM - RETRIEVAL



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PERSONNEL AND MACHINE COST PER YEAR FOR INTELLOFAX SYSTEM

OPERATION	PERSONNEL		MACHINES			TOTAL	
	Number and Grade	Cost	Type	Annual Rental	1/10 of Orig. Cost		
			INPUT				
1. Document Received and Disseminated		*(200,110)					*(200,110)
2. Analyze Information Report & Prepare Code Sheet		*(153,800)					*(153,800)
3. A. Type Multilith Master	1 GS-6 6 GS-5 9 GS-4	56,835	IBM-Elec.		765	57,600	
B. Off Set Print Multilith Master (Repro.)	3 LB 9	12,300	3 Off Set Press		1,050	13,350	70,950
4. Filming of Information Rpt.	1 GS-6 1 GS-5 5 GS-4	25,270	4 Model E Cameras		936		26,206
5. Aperture Preparation							
A. Key Punch from Batch Sheet	2/5 GS-4	1,366		460		1,826	
B. Verify Punch from Batch Sheet	1/5 GS-4	683		600		1,283	
C. Machine Prepare and Assemble Aperture	2/3 GS-5	2,446	½ Collator & Repro., 1/3 Sorter	2,157		4,603	
D. Process, Inspect, Film & Make Dup. Copy	1 GS-6 1 GS-5 1 GS-4	11,165	4 Film Processor Misc. Equip.		1,810	12,975	
E. Mounting of Film into Aperture	1 GS-5 2 GS-4	10,500	Mounting Mach. & Viewers		897	11,397	32,084
6. Intellofax Card Process							
A. Hand assemble Intellofax Cards	1 3/5 GS-4	5,464				5,464	
B. Punch & verify Intellofax cards	5 GS-4	17,075		2,640		19,715	
C. Machine Process Intellofax cards	3/4 GS-5	2,752		2,298		5,050	
D. Process Accession into File	3 GS-5	7,010	Sorter, Inter., 4 Collators	8,406		15,416	45,645
			RETRIEVAL				
File Maintenance & Request Service 7. Reference Librarian (Code Request)		*(11,000)					*(11,000)
8. A. Service Standing Weekly Request	¼ GS-5	918	Stat Mach & Sorter	720		1,638	
B. Control Section Rec. & Translate Request to Machine Language, Edit Request	5 3/5 GS-5	15,709	IBM Typewriter		260	15,969	
C. Machine Process Request	4 GS-5	14,680	2 Stat. Mach. 2 Sorters	8,352		23,032	40,639
9. Intellofax Tape Preparation	1 GS-9	5,440	Fax Machine		20,000		25,440
10. Aperture File Maintenance & Request Service	1 GS-6 4 GS-5 2 GS-4	25,590	10 Viewers 3 Photostats		2,474		28,064
11. Maintenance of Source File	1 GS-5 2 GS-4	*(10,500)					*(10,500)
MISCELLANEOUS COST 12. Equipment Maintenance	3 GS-9	16,320			751		17,071
GRAND TOTAL		231,523		25,633	28,943		286,099

* Omitted from totals - assume same operation under each system.

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PERSONNEL AND MACHINE COST PER YEAR FOR MINICARD SYSTEM

OPERATION	PERSONNEL		MACHINES			TOTAL	
	Number and Grade	Cost	Type	Annual Rental	1/10 of Orig. Cost		
			INPUT				
1. Document Received and Disseminated		*(200,110)					*(200,110)
2. Analyze Information Report and Prepare Code Sheet.		*(153,800)					*(153,800)
3. Type Multilith Master							NA
4. A. Key Punch Identification Information	½ GS-5	1,835	Key Punch (1)	462		2,297	
B. Verify Identification Information	½ GS-5	1,835	Verify (1)	594		2,429	
C. Card to Tape Conversion (Image Fix Field)	1/8 GS-6	510	Card to Tape Converter	58	44	612	
D. Filming of Information Report	¼ GS-5	14,680	Minicard Camera		7,550	22,230	27,568
5. A. Key Punch Coded Data	3 GS-5	11,010	Key Punch	1,386		12,396	
B. Verify Coded Data	2 GS-5	7,340	Verify	1,188		8,528	
C. Preparation of Aperture & Coded Work Sheet	1 GS-7 3 GS-5	15,535	1 Repro. ½ Sorter 1/3 Collator	990 660 478		17,663	
D. Card to Tape Conversion (Coded Data)	7/8 GS-6	3,570	Card to Tape Converter	1,328	1,006	5,904	
E. Exposure Coded Data & 35 mm Image	1 GS-6 3 GS-5	10% Night Dif. 16,599	1 35 mm Camera		184	16,783	
F. Film Processing of Image & Coded Minicard							
1. Process Film	1 GS-5	3,670	Film Processor		1,347	5,017	
2. Condition Film (wax)			Film Conditioner		200	200	
3. Inspect Film, Make Gamma & Density Reading	1 GS-7	4,525	Inspection Viewer & Densitometor		50	4,575	
4. Cut Film			Film Cutter		299	299	
5. Duplicate Film & Prepare Question Tape	1 GS-5	3,670	Flexowriter Duplicator		7,824	11,494	
6. Mask Printer			Mask Printer		150	150	
7. Mounting of Film into Aperture	2 GS-5	7,340	Mounting Mach.		540	7,880	90,889
8. Prepare Source Card		Cost Incl. in Step 9	Print Processor				
6. Intellofax Card Process							NA
			RETRIEVAL				
File Maintenance & Request Service Merge Code & Image Card		Cost Incl. in Step 8					
Sort by Subject Code		Cost Incl. in Step 8.					
7. Code Request by Ref. Librarian		*(11,000)					*(11,000)
8. A. Prepare Question Tape for Selector			Flexowriter		735	735	
B. Program Selector & Search File	1 GS-7 2 GS-5	11,865	Selector		8,090	19,955	
C. Sort Selected Cards According to Request	1 GS-5	3,670	Sorter		6,003	9,673	
D. Edit Request (Control Section)	1 GS-7 2 GS-5	11,865				11,865	42,228
9. Enlarge & Print Selected Cards.	1 GS-5	3,670	Print Processor		2,082	5,752	5,752
10. Maintain Request (Aperture File)	3 GS-5	11,010	18 Viewers 2 Photostat		3,560	14,570	14,570
11. Maintenance of Source File		*(10,500)					*(10,500)
MISCELLANEOUS COST							
12. A. Miscellaneous Equipment					400	400	
B. Maintenance of Equipment (CIA)	1 GS-12 1 GS-11 1 GS-9	19,400			1,000	20,400	
C. Eastman Kodak Maintenance (1 yr)					9,600	9,600	30,400
GRAND TOTAL		153,599		7,144	50,664		211,407

* Omitted from totals - assume same operation under each system.

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Minicard Equipment on Hand and "On Order"

	Number of Items	
	Received	On Order
Minicard Camera	2	-
Film Processor	1	-
Inspector Viewer	1	-
Film Cutter	1	-
Film Lubricator	1	-
Analysis Viewer	3	-
Desk Viewer	4	-
Flexowriter and IBM 024 Key Punch Combination	2	-
Flexowriter	2	-
File Cabinet	2	-
File Block	1	11
Sticks, Transfer Trays and Other Handling Equipment	various	various
Duplicator	-	1
Selector	-	1
Sorter	-	1
Enlarger-Print Processor	-	1

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CENTRAL INTELLIGENCE AGENCY

OFFICE OF CENTRAL REFERENCE

REPORTS — TASK TEAM REPORT NO. 13 — TTR/13

MEMORANDUM FOR: Assistant Director, OCR

SUBJECT: Final Report on "OCR Reports System", Task Team No. 13

25X1

1. MEMBERSHIP

[redacted] Office of Central Reference - Chairman

[redacted] Office of Central Reference Management Staff, DD/S 25X1

2. METHOD OF OPERATION

The members of the task team read the Report of the Library Consultants. Several meetings were held at which the comments of the consultants regarding reports and record keeping were discussed. It was agreed that each division should supply the task team with the necessary information regarding its report and recording keeping practices. To achieve this, copies of CIA Form No. 521, Reports Survey, were distributed to each OCR division. Each division completed the Form 521 and attached a sample of the reports prepared by them, with their comments as to the usefulness of the information reported. This information was reviewed and a new philosophy of reporting developed. The new reporting system was presented to the AD and his staff and it was agreed that the proposed system was adequate and that it would be installed in OCR. The Biographic Register was selected as a starting point and the new system was installed in December 1957.

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3. FINDINGS

a. In reply to the Consultants' comment that "too much time is spent keeping unnecessary records", a survey was made in October 1957 which indicated that approximately four man years were spent on the preparation of reports in OCR. This time represents only one half of one percent of available man years in OCR, and does not appear to be excessive. In some of the Divisions there is additional record-keeping which supervisors consider necessary for control purposes, work distribution schedules, etc. The Consultants' criticism appears to be based on their study of fiscal control and accounting procedures in the CIA Library's publications procurement activity. They observed that "at least four man years of time are now consumed in the Acquisitions Branch in bookkeeping and in fiscal control. As is the case in other parts of OCR, the procedure to use IBM cards for bookkeeping and acquisition analysis and control purposes is not found dependable and the records are also kept manually". This criticism is in part a valid one, and is a problem which Task Team 6 has included in its analysis of budgetary and fiscal procedures. It is anticipated that Task Team 6 will recommend that the Technical Accounting Staff of the Office of the Comptroller review the accounting and record keeping systems in the Acquisitions Branch of the Library and recommend a system to eliminate the duplicate record keeping and provide the required accounting information. We have been unable to find a similar problem in other parts of OCR, however, to support the Consultants' generalization on "unnecessary records". To keep OCR records and record-keeping in line with sound management techniques, the Assistant Director has assigned to a member of his staff the responsibility for the continuing review of reporting practices and procedures in each Division.

b. The Consultants stated that "present monthly reports can be revised to better reflect information of especial value". It was agreed that a revision of the monthly report would provide more meaningful information and a new philosophy of reporting was presented

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to the AD and his Staff and is currently being installed in OCR based on reporting on a monthly basis, information on the various activities and the number of man-hours expended on these activities. This new reporting system is intended to provide management with information that will enable them to better control the deployment of personnel by alerting them to changes in the operating picture. In addition, basic manpower statistics will be available to enable OCR to develop its budget estimates in accordance with the Comptroller's emphasis on the establishment of work measurement statistics. This new format (see Appendix A) is currently installed in all of the OCR Divisions, except the Library, which will be considered after the recommendations of the various Task Teams have been reviewed.

c. The Consultants stated "an annual (or semi-annual) report can be devised as an intregral part of OCR's report system, which report would be of value to top Agency management as well as to supervisors within OCR". To provide this, the Assistant Director has issued instructions (see Appendix B) for the preparation of an annual report designed to acquaint the senior officials of the Agency with the nature of the various programs and activities of OCR. Material for this annual report is currently being assembled and will soon be ready for publication. This first report is experimental and will cover the six month period ending 31 December 1957. Present plans, however, call for a regular 12 month report at the end of each Fiscal Year.

4. RECOMMENDATION

It is recommended that the Staff Assistant to the Assistant Director monitor the OCR Reports Program and report annually to him on the effectiveness and changes in the program.

25X1

Attachments:
Appendix A - Working Papers for Discussion of OCR Statistical Reporting Needs
Appendix B - Preliminary Thoughts on Appropriate Content of an OCR Annual Report

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TTR/13/Appendix A

WORKING PAPERS FOR DISCUSSION OF OCR STATISTICAL REPORTING NEEDS

A. Purposes

B. Principles & Techniques

C. Sample Format

D. Definitions of Terms Used in Sample Format

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TTR/13/Appendix A-2

PROPOSED OCR STATISTICAL REPORTING

A. PURPOSES

1. Montly Reports

   a. Identify the major activities.

   b. Report accomplishments under each activity.

   c. Report the cost of each activity. As labor is the major cost, report time worked as the major cost factor.

   d. Time worked by activity gives deployment.

   e. Relate total time accounted for (item c.) to available time (T/O and on board).

   f. Include those data required by higher echelons.

2. Semi-annual or Annual Reports

   a. Trends - by graphs, charts, or recapitulated tables.

   b. Distribution table of work received, by supply source.

   c. Distribution table of service supplied, by major components.

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B. PRINCIPLES & TECHNIQUES

1. Flexibility. If the OCR operation is dynamic, changes in the reporting format, programs, and units of measurement will be necessary. But for maximum consistency, care should be taken to make changes within the philosophy of the reporting system.

2. Narration. When possible, narrative reporting should be keyed to the quantitative reporting. Examples: new or significant developments; new or changed programs.

3. The reporting should be integrated with the organization's work records.

4. The variety of activities precludes a single work unit (other than time or money). For each activity, a unit of measure should be selected which is related to the time required.

5. It must be recognized that some backlog is normal.

6. It is not necessary to report all activities nor to account for all work time. Probably major activities can be reported on one sheet and will account for some seventy percent of time worked. And probably the last thirty percent would require

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two or three more sheets without contributing much information for management.

7. The basic technique for achieving consistency and simplicity is to develop written definitions of activities and units of measure.

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TMD/13 APPENDIX A-5

PERIOD ENDING:

I. WORK FORCE

					Man-Mo.	%
1. Employees gained	2	A.	-	T/O	800	120
2. Employees lost	1	B.	100	On Board	804	121
3. Turnover per cent, this month	3	C.	-	Overtime	4	1
4. Ditto, this month, last year	5	D.	-	Temporaries	2	-
		E.	101	TIME AVAILABLE	810	122
		F.	13	Leave	105	16
		G.	5	Training	40	6
		H.	83	TIME WORKED	665	100

II. WORK ACCOMPLISHED

Activity	Volume Start	End	Rec'd	Fin.	Time/ Unit*	Man-Mo.	%
INPUT							
1. Screen	9	5	40	44	.9	40	6
2. Analyze, Code, and Abstract	14	18	34	30	3.3	100	15
3. Process into Files	29	9	30	50	1.2	60	9
						200	30
SERVICE							
4. Disseminate and Distribute	30	20	200	210	.2	53	8
5. Publications Supplied from Collections				9	5.9	53	8
6. Reference Service	20	40	2020	2000	.04	80	12
7. Publications Procured				27		53	8
8. Publications Purchased for Users				1350	.02	27	4
9. Briefings						27	4
10. External Support (Machine Division)						40	6
						333	50
11. ADMINISTRATION/SUPERVISION						32	5
Total Time Accounted For						565	85
Remainder Unaccounted For						100	15

* Underline if estimate is used. Leave blank if invalid.

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TTR/13/Appendix B

21 October 1957

PRELIMINARY THOUGHTS ON APPROPRIATE CONTENT OF AN OCR ANNUAL REPORT

1. Period Covered

Report would cover the fiscal year, hence annual report would be dated 30 June. Depending on how much of the material for this report is accumulated, it might be desirable to prepare also a preliminary report for the six months ending 31 December.

2. Effort Invested in Preparation

To the extent possible, the report should be based on material prepared for operating and administrative purposes by the branches, divisions, staffs, and the office, during the course of the year. In short, the annual report should be an integral part of OCR's entire records program. Graphics would be used where particularly helpful, but no major costs for graphics or reproduction should be incurred.

3. Scope

The report should compare favorably with one made by an operating division of a large company for its parent corporation, or by the president of a company for his

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board of directors. It should be sufficiently detailed to serve the policy and general management needs of the OCR Operating Committee.

4. Organization and Coverage

In general, the highlights would constitute the body of the report. Basic statistical and organizational material would appear in appendixes. Major sections might include:

A. Important Events, such as important organizational changes in OCR or elsewhere - which have influenced OCR operations significantly.

B. Major Support Programs, recapitulated to show what the programs are, for whom performed, accomplishments during the reporting period, and at what cost,

[redacted] 25X1

C. Community Activity, recapped to highlight efforts in which OCR plays a leading or primary role (e.g., AHIP).

D. Major Problem Areas, including the current and prospective attacks being made on them.

E. Noteworthy Advances in State of Arts in which OCR has a primary interest, and a forecast of their possible significance for OCR.

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APPENDIXES

I. Organizational data, mission statements including bio-info on personnel, from Branch Chief level up, involved in changes.

II. Statistical summaries reflecting workload by organizational units.

III. Budgetary data by class.

IV. Personnel Notes.

V. Identification of physical plant facilities.

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S-E-C-R-E-T

CENTRAL INTELLIGENCE AGENCY

OFFICE OF CENTRAL REFERENCE

TRAINING | TASK TEAM REPORT NO. 14 | TTR/14

26 March 1958

MEMORANDUM FOR: Assistant Director, Central Reference

SUBJECT: Final Report on Training, Task Team No. 14 25X1

25X1

1. Membership 25X1

The Task Team Membership consisted of: 25X1

[redacted] Chairman, Chief, Graphics Register, OCR
[redacted] Chief, Reference Branch, CIA Library
[redacted] Deputy Chief, Intelligence School, OTR
[redacted] Training Officer, Industrial Register, OCR

2. Method of Task Team Operation

a. The Task Team discussed ways in which meaningful data could be accumulated for study. The interview technique was considered, but used only to a limited degree; primary reliance was placed on a questionnaire, as a rapid means of polling a significant number of people. Questionnaires were returned by 449 professional employees of OCR. The findings are tabulated in the tables of Appendix F; each table or group of tables is preceded by a brief explanation.

b. The people filling out the questionnaires were particularly requested to consider only the jobs they were presently in. It was stressed that the questionnaire was designed to show the requirements of the job, what any person in the slot under consideration would need to do the job well; that there was no relationship between a career plan and the questionnaire was emphasized. In spite of this, the person filling out the questionnaire did not always succeed in divorcing his career hopes from the requirements of his job. As an illustration, 35 people who have no supervisory responsibility checked the course in Basic Management as valuable.

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3. Recommendations

a. The Task Team recommends that training be used: first, to raise on-the-job proficiency, and second, to groom a professional staff for continuing service to the Agency (page 7).

b. The Task Team recommends that the training program be tailored to the needs of the individual within the general requirements of the Division (page 7). 25X1

[redacted]

[redacted] Chairman
Task Team Fourteen

25X1

Attachment:
Final Report of Task Team Fourteen

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TTR/14-3

TASK TEAM REPORT No. 14

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II.	Approach to the Problem	4
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Attachments	Appendix
OCR Training Policy (Proposed)	A
[redacted]	25X1
Comparative Training Data: OCR, OSI, ORR	D
Sample Questionnaire	E
Summaries of Replies to Questionnaire	F

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I. PROBLEM

Task Team 14 was organized at the direction of the Assistant Director of Central Reference, to study the training policies of OCR and OTR; specifically to determine if:

(1) Professional employees of OCR should be given the same training program, particularly in introductory courses, as are the analysts in producing offices in the Agency.

(2) A training program can be devised which will enable the professional staff of OCR to give a higher level of reference service to users of OCR facilities from the intelligence community.

II. APPROACH TO THE PROBLEM

The Task Team, for the purpose of this study, divided professional employees of OCR into two categories: (a) analysts, and (b) librarians.

The first category was used for comparing OCR analysts with professionals in the producing offices of the Agency. ORR and OSI were the only producing offices considered for comparison in this survey.

The second category enabled the Task Team to more forthrightly evaluate the recommendations of the library consultants pertaining to library reference services.

With accepted terms of reference, the Task Team then divided the problem into:

(1) A comparison of the training taken by professional employees of OCR, ORR and OSI. (Appendix D)

(2) An evaluation of the training courses provided by the Office of Training, particularly with respect to courses having a common application for the three Offices. (Appendix F)

(3) A consideration of the level of OCR reference services to determine what training could be recommended to increase the level of these services.

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III. CONCLUSIONS AND FINDINGS

1. Professional employees of OCR receive the same training in courses having common application, as analysts from ORR and OSI.

The Agency's Intelligence Orientation Course is the only introductory course provided. This course, (Agency Regulation [redacted]), has been required for all new professional employees of the Agency since March 1953. The survey revealed that the Office of Central Reference had a higher percentage of its employees in this course in 1956 and 1957 than either ORR or OSI. 25X1

[redacted] 25X1

Attendance at Agency Orientation Courses	
Number	Percent
90	17
74	12
17	8
82	18
83	14
18	8

Going beyond this one introductory course, the Task Team considered other training courses having a common application to the three offices. These were grouped in the following categories for purposes of comparison:

Area Studies
Foreign Language Courses
Reading, Writing and Speaking Courses
Supervisory Courses
Courses on Research Methods
Courses on Special Techniques

Comparing the professional staff of the three offices for the years 1956 and 1957, the Task Team found that OCR had the highest percentage of professional participation in area studies and research methods.

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TTR/14-6 25X1

[redacted]

	Research Methods	
	No.	Percent
	10	2
	8	1
	2	1
	1	.2
	0	-
	0	-

There were variations between the three offices and within the offices as to foreign languages, reading, writing and speaking courses, supervisory courses and special training techniques (Appendix D), but the Task Team concluded that the professional employees of OCR do have essentially the same training as analysts in the producing offices.

2. As to over-all professional training, both internal and external, the Task Team found from the study of training registrations on record with the Registrar/OTR (Appendix D) that OCR professionals had about the same amount of training as ORR. OSI had the greatest percentage of training but a significant portion of it was specialized training not applicable to ORR and OCR. 25X1

[redacted]

3. As to raising the level of OCR Reference service, the Task Team is of the opinion that the problem involves more than a question of training.

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It was agreed that the level of reference service presently provided, grade by grade, is commendable, with personnel sincerely extending themselves to render the maximum amount of service. It is believed that the level of reference service, if it is to be raised significantly, must be established by providing a higher grade structure rather than through training at the presently established grades.

Training is desirable and will raise the level of reference service at any grade but it will not accomplish what we think the library consultants had in mind. Training beyond that appropriate to the grade will usually result in a transfer to another job of higher grade, rather than in a sustained higher level of service at the same grade. A Grade 11 level of reference service requires a Grade 11 position.

IV. RECOMMENDATIONS

The Task Team recommends that training be used: first, to raise on-the-job proficiency, and second, to groom a professional staff for continuing service to the Agency.

The training program for on-the-job proficiency should be supported by an Office Training policy. (Appendix A). The Agency training policy established by the Director in October 1955 (Appendix B), provides that five percent of on-duty personnel will be in a training status at all times. In complying with this directive, OCR should incorporate a flexibility so that the application of training within any Division, or as to any individual case, will be governed by the need of the individual in relation to the job he is performing. While the OCR on-duty training will be programmed for five per cent, individual training may vary as required. There might be little or no training in one case; rather extensive training in another.

As to the training program, the Task Team recommends that it be tailored to the needs of the individual within the general requirements of the Division.

For trial purposes, it is suggested that each Division plan and recommend areas of training appropriate to its responsibilities. Particularly during the first years of employment, the need for training will be recognized both by the individual and his supervisors. Training during this period would be planned co-operatively, with the primary objective being improvement in on-the job proficiency.

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The training plan would be reviewed within the Division to insure that it is compatible with the requirements of the job and is scheduled so that it will not disrupt or unduly hinder the work responsibilities of the Division. Training should be reviewed annually so that changes in both courses and schedules can be made from year to year, to take into account changes in work assignments and responsibilities. This will make training a continuing program adjusted annually or as necessary. For each individual the program would be current and continually up-dated.

Beginning with an individual's attainment of Career status, training would be continued under the existing Career Preference Outline concept, which also provides for an annual review.

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TTR/14--Appendix A

OCR NOTICE

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1958

OCR TRAINING POLICY

The training policy of the Office of Central Reference is to provide its personnel with such training as is necessary to increase the capabilities of an individual in terms of OCR needs, and, beyond this, in terms of Agency requirements. The diversity of activities within OCR make impractical the establishment of a standardized training schedule on an Office basis. Therefore, each OCR Division will plan and schedule training for its own personnel in accordance with the following conditions:

1. Division training officers will keep continually informed on approved training to apprise the Division of training which will increase the proficiency of an individual in his particular assignment.

2. All training should be related to the employee's current or projected duty assignment.

3. OCR Divisions should plan and schedule training to encourage growth and advancement within the Division.

4. Training should not disrupt normal operations to meet Division responsibilities.

5. Training must be approved by the Division before forwarding for further appropriate action.

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OFFICE MEMORANDUM UNITED STATES GOVERNMENT

TO : OCR Professional Staff DATE: 16 December 1957

FROM : Chairman, Task Team on Training

SUBJECT: Survey of Training Needs of OCR Professionals

1. The Task Team on Training was formed to study the training policies of OCR and OTR. Specifically, this Task Team is to determine if:

a. Professional employees of OCR should be given the same training program, particularly in introductory courses, as are analysts in producing offices in the Agency.

b. A training program can be devised which will enable the professional staff of OCR to give a higher level of reference service to users of OCR facilities from the Intelligence Community.

2. In support of the work of this Task Team, all professional employees who entered on duty in OCR before 1 December 1956, are requested to fill in the appended questionnaire. Professionals are generally grouped as: (a) analysts and supervisor/analysts, or (b) librarians and supervisor/librarians. The results will provide us with some necessary basic data.

3. The questionnaire should be filled in from the standpoint of skills and knowledge which could be provided by training and are needed by you to perform your work successfully. Since the list of courses is preliminary, please add under each category any other types of training which you feel are or would be of value for performing your job successfully. In suggesting courses, do not limit yourself to what might be offered by the Agency, since some training might be available through local universities. Where possible, please express an opinion even though you may not have taken the course. 25X1

4. Please return this questionnaire to your Division Chief by 20 December.

[redacted]

Chairman,
Task Team on Training

Approved: _____
Paul A. Borel

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OCR TRAINING QUESTIONNAIRE

Name_____ Division_____ Branch_____

No. of Years In CIA_____ No. of Years In Present Division_____

EOD Grade_____ Present Grade_____

Underline your present position (Administrator, Supervisor, Supervisor/Analyst, Analyst, Librarian, Librarian/Supervisor)

Subject and/or area responsibility_____

* * *

The following should be filled in by professionals, other than division or branch chiefs.

Degrees_____ Major Fields of Specialization in College_____

Subjects studied in college or graduate school which are of value in your present position.

_____

_____

Types of work outside OCR which have been of value in your present position.

Type of Work	Years of Experience

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	Of Little Or No Value	Valuable	Essential	I Have Taken This Course
C. Foreign language writing List Language | Proficiency Level Needed*				
List Others				
Research tools and techniques (for analysts)				
A. Effective writing				
B. Writing workshop				
C. English usage				
D. Intelligence techniques (writing examples of reports issued by each of the research components of CIA				
E. Intelligence research techniques and facilities				
F. Seminar in problems of intelligence research				
G. Editing of reports				
H. Use of maps in intelligence				
I. Use of statistics in research				
J. Aerial photo interpretation				
K. Speed writing				
L. Typing for analysts				
List Others				
Administration (for supervisors)				
A. Basic supervision				
B. Basic management				

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	Of Little Or No Value	Valuable	Essential	I Have Taken This Course
C. Conference leadership				
List others				
Professional background (for Librarians)				
A. Introduction to library materials				
B. Introduction to library services				
C. Organization of library materials				
D. Advanced cataloging				
E. Advanced classification				
F. Indexing and abstracting				
G. Referencing and bibliographies				
H. Government documents				
I. Principles of library administration				
J. History of Books and libraries				
K. Principles of book selection				
List others				
Miscellaneous				
A. Reading techniques				
B. Reading analysis program				
C. Applied psychology				
D. Effective speaking				
E. Oral presentation of intelligence				

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Summaries of Replies to Questionnaire

The tables which follow summarize the replies to the questionnaires. The questionnaire itself listed various courses, within categories, and asked for an evaluation of each course in relation to the job. All categories except two, Office briefings and library science, comprised courses given by the Office of Training. Those answering the questionnaires were most nearly unanimous in agreeing on the necessity for a greater knowledge of the functions and resources of other parts of the Agency. Next in importance appear to be the reading, writing and speaking courses, then come area studies and foreign language courses. However, as the breakdown tables show, there is no real pattern, so far as area and language studies are concerned, from which an over-all OCR training policy could be established. For example, 54 percent of the people in Liaison Division felt that area studies were valuable, 15 percent foreign languages; in Document Division the percentages were 57 and 39. In Biographic and Industrial Registers, on the other hand, the percentages were 97 and 98, and 100 and 93 respectively. Library Science, as might be expected, was of real value only to Library employees, but here opinion was 100 percent in favor of library courses.

The conclusion seems to be that every course has value for some job, but except for Orientation and Office briefings, no one course has value in every job.

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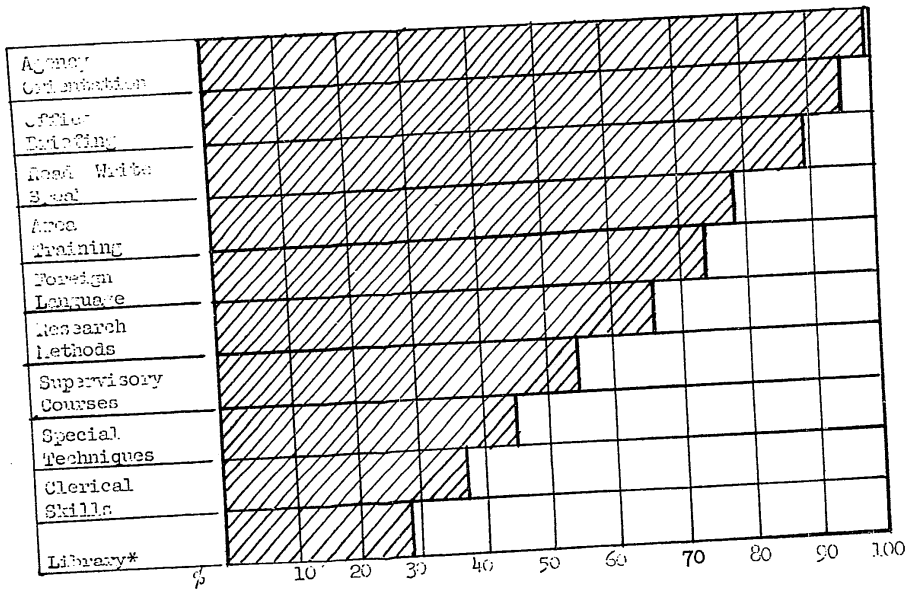
Areas of training considered valuable by the professional staff of the Office of Central Reference. Percentages are based on the total number of questionnaires completed. 25X1



*100% of the CIA Library staff indicated library courses as valuable or essential.

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Areas of Academic Training Considered Valuable

Every person filling out a questionnaire was asked to specify areas of academic training which had proved to be of value in his job. The Task Team hoped that some studies would emerge as of particular importance. However, such was not the case. The answers listed overwhelmingly those studies found in a liberal arts curriculum. Since the professional staff of OCR is composed generally of people who have a liberal arts background, the questionnaires indicate only that education is desirable.

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Area of Work Experience Considered Valuable

People filling out the questionnaire were asked to list prior work experience which had proved of value in the present job. The Task Team hoped that the answers would reveal some work experience which had over-all value and this would indicate lines from which to recruit new employees. However, as with academic studies, the only conclusion to be drawn is that prior experience is valuable.

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S-E-C-R-E-T

CENTRAL INTELLIGENCE AGENCY

OFFICE OF CENTRAL REFERENCE

CUSTOMER RELATIONS TASK TEAM REPORT NO. 15 TTR/15

14 March 1958

MEMORANDUM FOR: Assistant Director, Central Reference

SUBJECT : Final Report on Customer Relations, Task Team No. 15

1. Membership 25X1

The Task Team membership consisted of: 25X1

[redacted] Chairman, Industrial Register, OCR
[redacted] Service Division, ORR 25X1
[redacted] Intelligence Production Staff, OSI
[redacted] Liaison Division, OCR 25X1
[redacted] Documents Division, OCR 25X1
[redacted] Graphics Register, OCR
[redacted], Library, OCR 25X1
[redacted] Biographics Register, OCR

25X1

2. Method of Task Team Operation

The Operating Committee designated the title "Customer Relations" and the number (15) to this project and appointed the undersigned to select and chair a Task Force Team of CIA representatives to resolve the problem. An opportunity was recognized by the team to contact personally a number of IAC users of OCR facilities to determine all problems affecting customer relations. However, the Operating Committee confined the plan of operation to CIA Offices and the problem as stated on page TTR/15-3 of this report. Part (A) of the problem was resolved by the Assistant Director, OCR when he established the Central Reference Advisory Group (CRAG). See Appendix A. The Operating Committee suggested that Part (B) of the problem could be resolved by contacting the programs and policy staff of each office concerned. The Chairman directed each member of his task team to personally contact intelligence producing components at the level suggested by the Operating Committee. CIA components contacted were as follows:

a. Office of Research & Reports, DDI

b. Office of Scientific Intelligence, DDI

c. Office of Basic Intelligence, DDI

d. Office of Current Intelligence, DDI

e. Office of National Estimates, DDI

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I. PROBLEM

To study means whereby OCR can get guidance for its operations from customer offices; specifically to determine if:

A. A Library Committee composed of representatives of all the components of the Agency should be created to serve in an advisory capacity to the Assistant Director, OCR and as a channel of communication to the Agency.

B. A program should be developed to bring together the analyst and the Reference Staff so that the Reference Staff may be aware as much as possible of what intelligence reports and programs are underway so that the staff might give a higher level reference service and be prepared to call to the attention of the analyst pertinent periodical articles, intelligence reports, books, documents, etc., which is a normal special library technique and service.

II. CONCLUSIONS

The need for a formal program to bring together the analyst and the Reference Staff may have existed some months ago but is not deemed necessary today. Two offices, OSI and OBI, have been keeping OCR apprized of their latest research activities by forwarding project outlines in sufficient numbers to distribute to interested OCR Divisions. Both offices desire to continue this procedure. ORR has concluded that information to be gained from published research programs, lists of current or prospective projects and formal ORR requirements is too general to provide OCR with meaningful guidance. The DDP and OCI are not in favor of a formal program as proposed. ONE makes limited use of OCR facilities because they are not engaged in basic research. OO does not normally operate on a set schedule of projects and could not forecast possible future needs to alert OCR. The majority of offices contacted prefer to use the "direct contact" method to alert individual OCR personnel of programs underway and to utilize OCR facilities in ad hoc fashion. Suggestions by some CIA offices to further relations with OCR are noted below:

A. Periodic briefings on OCR as well as personal tours, should be encouraged for all potential users of OCR facilities. While this is being accomplished to a limited degree, no efforts have been exerted to launch such a program on a formal or consistent basis. Some offices expressed a wish that OCR take the initiative.

B. Published descriptions of each OCR Division's services and facilities would be of value to users of these facilities. Though not reflected in all of the findings this was a unanimous suggestion.

C. ORR and OSI desire to designate a member of their staffs to act as a point of contact for OCR personnel to receive guidance on both general and specific questions.

D. ORR desires the establishment by OCR of a single point of contact through which all OCR resources could be tapped. A central reference point would assist an ORR analyst in obtaining the required information in the shortest period of time. However, time permitting, the analyst should be encouraged to contact the OCR components directly.

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3. Periodic briefings or tours should be arranged for ORR personnel, so that the OCR services and facilities of particular relevance to ORR research can be made known to research analysts. To be most meaningful, such briefings or tours should be provided for analysts who have worked in ORR from 3 to 6 months. Detailed arrangements should be worked out by OCR and ORR.

4. Published descriptions of OCR services and facilities should be made available to all ORR analysts, possibly in the form of mimeographed insertions for the ORR Analyst's Manual.

B. Office of Scientific Intelligence, DDI [redacted] 25X1

In connection with the objectives of Part (B) of Project 15 problems, OSI will follow existing procedures. To keep OCR apprized of latest OSI research activities, we will forward project outlines of new projects in sufficient number to distribute to each of the interested Divisions. The annual production program will be made available as in the past. The meetings between OCR and OSI representatives designed to bring OCR more closely into the planning phase of OSI work will continue to be held until each of the OSI divisions are covered. In view of the success of meetings already held it may well be desirable to maintain this practice for an indefinite period.

As a result of my experience on Project 15 and from discussions with OSI members of other OCR task teams, I am recommending that OSI designate a member of its staff to be clearly responsible for OSI-OCR relationships and who will be able to advise OSI analysts in regard to their liaison with OCR.

C. Office of Basic Intelligence, DDI [redacted] 25X1

It is important to realize that OBI is not an intelligence-producing office, in the same sense as ORR. It does not actually research and prepare intelligence reports, and would not have the same reference problems as a producing office, such as ORR, OSI, or the State Department, which must have access to all available material to produce a piece of intelligence reporting. The primary mission of OBI is the coordination, review, and publication of the National Intelligence Survey. The individual NIS units are produced by those agencies of the Government - both IAC and non-IAC - best qualified by reasons of their intelligence responsibilities, production capabilities, and dominant interest. OBI, however, has the responsibility of insuring that NIS standards are met by these producing components. To carry out this responsibility, the review function in OBI is divided between two main components: Editorial Division and Regional Division. The area specialists in Regional Division review each NIS manuscript to insure its regional accuracy and adequacy. The professionals in Editorial Division are functional specialists (geologists, aerographers, economists, etc.) whose job it is to ensure that the subject matter coverage of each NIS is both accurate and adequate.

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In conclusion, OBI's use of OCR facilities has been limited, mainly due to the nature of their operation. However, if the objectives of this task force are realized, OBI will no longer need to advise NIS-producing offices of OCR services and facilities; when the Agency moves to its new location, OBI will make more direct use of OCR's facilities because the distance factor will have been eliminated. There is no actual reference problem here, just possible improvement to existing policies.

D. Office of Current Intelligence, DDI [redacted] 25X1

A reference staff as proposed in Project Fifteen would alter existing contacts. If anything, such a staff might tend to destroy such contacts.

There are no apparent difficulties existing in the relationship between OCI and OCR.

Because OCI operates, generally, on a daily or priority basis, present contacts existing between the OCI analysts and particularly the personnel of the Library and Graphics Register are more than adequate.

It would be of great value to OCI, if OCR would prepare a detailed handbook giving functions, operations, capabilities, file coverage, etc. of the various divisions.

E. Office of National Estimates, DDI [redacted] 25X1

The Office of National Estimates makes limited use of OCR information facilities and services. The consensus among the people interviewed is that the ONE mission is not related to OCR service capabilities. The staff is small, and there is neither time nor need to engage in basic research for the preparation of national intelligence estimates, staff memoranda, or spot appreciations.

ONE writes specifications for the preparation of NIE's and assigns production responsibilities. There is no general rule about the scheduling of projects. Other members of the intelligence community conduct the research necessary for their contributions. ONE depends upon them to use OCR.

ONE makes little use of Liaison Division because of its own direct working relationships with the IAC. ONE comes to the CIA Library for a specific book or document, rarely to determine what material is available on a certain subject or area. The subjects covered in estimates are so broad that the few bibliographies that ONE has requested the Library to prepare have provided material only of marginal interest. ONE makes greater use of State's Division of Biographic Information than it does of CIA's Biographic Register.

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TTR/15--Appendix A

CRAG 1-58
13 January 1958

C E N T R A L I N T E L L I G E N C E A G E N C Y

CENTRAL REFERENCE ADVISORY GROUP

Terms of Reference

Attached are the terms of reference of the CIA interoffice committee organized
7 January 1958 as the Central Reference Advisory Group (CRAG). It is noted
t, in addition to the concurrence of the regular membership, the Office of
ional Estimates, the Office of Current Intelligence, and the Office of
rations, also concurred in these terms of reference, thereby agreeing to
ticipate under the third paragraph.

Paul A. Borel
Assistant Director
Central Reference

stribution:
DD/I
DD/S
IAD's
Chief, FI

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TTR/15--Appendix A-2

7 January 1958

C E N T R A L I N T E L L I G E N C E A G E N C Y

TERMS OF REFERENCE OF THE
CENTRAL REFERENCE ADVISORY GROUP

Recognizing that the Office of Central Reference provides services of common oncern, particularly for the research and operating components of the Agency, and hat there exists therefore an interdependence among our offices requiring coopera- ive effort if we are to serve the best interests of the intelligence community, we re agreed to establish the Central Reference Advisory Group (CRAG).

The regular membership of CRAG, under the Chairmanship of the Assistant irector for Central Reference, shall include the following officials or their esignees:

Assistant Director for Basic Intelligence
Assistant Director for Research and Reports
Assistant Director for Scientific Intelligence
Chief of Foreign Intelligence

Other components of the Agency will be invited to participate in meetings nen an agenda item indicates they have an interest in it.

The general objectives of CRAG are:

a. To provide AD/CR with policy guidance in the conduct of programs in support of research and operations, including matters of interest to the IAC.

b. To facilitate referral by AD/CR to the members for advice of proposed changes in reference service programs.

c. To facilitate referral by the members to AD/CR for appropriate action of plans and programs the implementation of which would affect reference support programs.

d. To provide a forum for the exchange of ideas in areas of mutual interest to the research, operational and reference activities of the Agency.

_____
AD/BI

_____
AD/RR

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AD/SI

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Chief, FI

_____
AD/CR

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CENTRAL INTELLIGENCE AGENCY

OFFICE OF CENTRAL REFERENCE

CORRELATIVE FUNCTIONS — TASK TEAM REPORT NO. 16 — TTR/16

20 March 1958

MEMORANDUM FOR: Assistant Director, Central Reference

SUBJECT : Final Report on Correlative Functions, Task Team No. 16

1. Membership 25X1

William A. Tidwell, Chairman, Office of the DD/I 25X1
[redacted] Geographic Research Area, ORR
[redacted] Plans Staff, OCI
[redacted] Fundamental Science Division, OSI 25X1
Jean W. Moreau, Planning and Coordinating Staff, OO
[redacted] Statistical Division, OCR 25X1

2. The Problem*

To study the feasibility and desirability of regrouping within OCR certain reference-type functions now the responsibility of other Offices; specifically to determine if:

(1) The Map Library, ORR, should be transferred to OCR.

(2) The Foreign Documents Division, OO, should be transferred to OCR.

(3) The Office of Training Library should be transferred to OCR.

(4) The Historical Intelligence Collection should be transferred to OCR.

(5) Such transfers are essential to preserve the "central reference" concept.

(6) Timing of transfer is an important element, assuming transfer.

* In view of other decisions taken outside of the scope of Task Force 16, only items 1, 2, 5, and 6 were considered in our study.

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provides essential technical and other support to the Map Library, and because the Map Library operates as part of an integrated geographic activity under the direction of geographers.

d. "Central Reference" Concept

(1) There should be an integrated program for the development of reference services throughout the Agency.

(2) There are components of the Agency with a reference capability which apparently were not considered by the consultants.

(3) It would be desirable to develop a complete inventory of reference facilities in the Agency and develop an integrated program for them under the leadership of OCR.

(4) It is not essential, however, to have all organizations with a reference capability belong to the same administrative body for them to be part of an integrated program for reference services.

In addition to these views on the specific problems of the Task Force, we felt that our views on a number of related matters should be brought to your attention in the hope that they might help to suggest other ways in which the objectives of the consultants might be reached. These are summarized below:

a. If, as a result of the work of Task Team 11, it is decided to establish a single reference point, such a reference facility could be staffed by highly trained research and reference personnel who would be fully witting of the organization of the Agency, the functions of all components, reference materials available, etc. Such personnel would not be designated reference librarians, but would have a much broader appreciation of the Agency-wide reference resources. On the other hand, if it is decided to staff a single reference point with representatives of all major reference components, the Map Library should be asked to establish an advance element at the reference point on a trial basis. The present physical separation of the Map Library from the probable location of the reference point may make its participation impractical, but this can be determined accurately only by trial. In any case, we feel that the plans for the location of the Map Library in the new building, adjacent to OCR reference facilities, will enable the Map Library to overcome this difficulty in the future.

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b. The Office of Central Reference should develop an independent capability to give first-echelon linguistic assistance to analysts researching foreign language publications and documents. This could be accomplished in time by recruitment and training policies designed to equip OCR reference personnel with the knowledge of languages necessary to undertake this service as a normal part of their reference work.

c. The AD/CR should sponsor the development of an integrated program for the reference functions in the Agency on an evolutionary basis and provide means for the cross-fertilization of ideas and discussion of reference problems among the various components of the Agency having some reference function (not only FDD and Map Library but such others as the Estimates File of ORR, for example). He might consider as a means to this end, developing a subordinate body to CRAG as a working party to help him in this task. The members of the working party should be persons directly concerned with reference activities.

4. Conclusions

It is concluded that:

a. The Map Library should not be transferred to OCR.

b. The Foreign Documents Division should not be transferred to OCR.

c. Such transfers are not essential to preserve the "central reference" concept.

5. Recommendation

It is recommended that FDD and the Map Library not be transferred to OCR.

[redacted] 25X1

WILLIAM A. TIDWELL
Chairman
Task Team Sixteen

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Reports/

Surveys

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END

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