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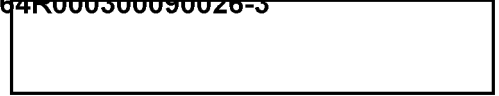

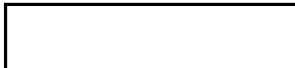


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CATCHING UP WITH HISTORY

1. In the course of the U.S. Government existence, history is most often written when a job assigned a Government agency is finished or is transferred to a new agency. It is this terminal nature of historical writing toward which this paper is addressed.

2. In less than a year the twentieth anniversary of CIA's beginnings, namely, the CIG, will be celebrated. Within these early periods of the Agency, growth was rapid with some employees being recruited from the predecessor intelligence agency, OSS, and others from the varying discontinued wartime and military services. With five or more years of prior government and/or military service, this early group of officers will have completed twenty-five to thirty years of service within the ensuing five-year period. We can anticipate in numbers as many as one thousand of our professional colleagues seeking retirement within the next five to ten years. Indeed, we shall see the end of an exciting, eventful, and, yes, nostalgic Chapter in the History of the Clandestine Services. This group of officers represent a reservoir of historical "I was there, Charlie" experience which will become irretrievable unless we plan for this retirement eventuality now. Concurrently, a mass of archival material encompassing the operational activities of these same officers will reach the maximal retention deadline and will automatically become subject to destruction. It is essential to our mission to salvage these experiences and records while they are still within our grasp.

3. So that the precious experience reposing in these officers can be distilled in a systematic manner, arrangements have been made to notify Chief, HS/CSG of prospective CS retirees. Following this notification a biographic profile will be obtained for determining those experiences of a retiree which might need to be written up, and his aptitude for historical writing. After examination of the profile a member of HS/CSG will approach the selectee to determine his capacity to contribute to the historical program. Likewise, ascertained at this time will be what administrative arrangements may be needed to accomplish the selectee's participation. The results of this meeting, together with suitable recommendations on the subject's eventual debriefing via a tape recording or the scope and phrasing of a proposed historical paper by him, will be forwarded to the CSHE for approval. Meanwhile, as a further means of identification, members of the HS/CSG are compiling from their document analysis activity a list of officers who are knowledgeable in particular areas and activities.

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4. Needed now is action which will formalize the desirability of using these prospective retirees in the CS historical program, and which will set forth the administrative details of finance, security and personnel management inherent in their use. In contemplating the administrative mechanics it becomes obvious that a projected historical endeavor must be carried out at the related CS division or staff desk and generally under the cognizance of the chief of that CS division or staff which will notably benefit from the results. Thus, the CS divisions will support the historical effort in three ways:

a. Detail Prior to Retirement Date. Six to twelve months prior to retirement, an officer usually experiences some relief from maximum responsibilities and could be detailed part-time to an historical research job in either his actual organizational segment or in the area of a previous assignment where a high priority has been assigned by the CS Historical Board. This officer would enjoy full access to the applicable division, staff and Agency archival files, to the CS historical indices and records, and to assistance from the HS/CSG as need dictates. He would be continued in his parent organizational unit until retirement.

b. Lump-sum Contract After Retirement. Prior to retirement the officer's potential contribution to historical literature will be determined. If the substance and priority warrant and he cannot complete the desired work prior to retirement, his use under contract will then be considered and approved by the CS Historical Board. With assistance from the HS/CSG a prospectus will be drawn, pertinent documents and document collections will be identified, and such initial research as is possible will be undertaken. Arrangements will be made with the Office of Security to continue clearances after retirement, and a lump-sum contract will be drawn specifying completion of a particular study within an assigned period of time. The retirees' contracts and the enabling CS project will be administered by the HS/CSG, but the research will be carried on within the appropriate CS staff or division, which will provide space and administrative overhead support. The research product will become a part of the CS History and will be included in the Index of CS History. Its release for use by others will be controlled by the responsible CS division or staff unless it is sufficiently desensitized or covers a defunct element of the Clandestine Services, in which cases it will be controlled by the HS/CSG.

c. Taped Interviews. For that prospective retiree who has no aptitude or inclination toward historical expression,

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insufficient time for research and writing and/or who may have plans to leave the area as quickly as he is relieved of current duties, his experiences must be recorded for processing by others. This can be done by arranging for a taped interview(s) which would then be transcribed, reviewed, returned to the author for his comment and correction, and when completed would be incorporated into the Index to CS History maintained by HS/CSG. In this way others can avail themselves of experience which would otherwise be lost.

5. To achieve the ends set forth above, thoughtful officers must now consider the establishment of DD/P policy embracing these concepts. Thereafter, each CS division and staff should expect and plan to include modest provisions, for the CS historical effort, in its jurisdiction. Moreover, DD/P will need to establish the enabling project from which modest lump-sum payments can be made to retired officers for completing under contract portions of the CS History. (An initial project for \$25,000 is suggested.)

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CONDUCTING THE CS HISTORICAL EFFORT

Historical Staff, O/DCI will:

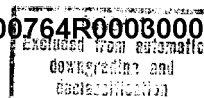
1. Provide general guidance and administrative support for the HS/CSG.
 - a. Service the reference indices of CS organization and people.
 - b. Facilitate the typing of historical papers when such is beyond the capabilities of the office of a contributing writer.
 - c. Relate the CS historical efforts to those of the rest of the Agency.
 - d. Make available the contributions of earlier Agency historians, to the HS/CSG, e.g., the OSS History, the [redacted] History and related papers, the [redacted] History and related papers, selected material from the Studies In Intelligence.
2. Contribute standards and professionalism which will enhance the meaning and usefulness of CS historical papers.

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Clandestine Services Historical Board (CSHB) will:

1. Provide a planned coverage of CS history--
 - a. Establish component and function priorities.
 - b. Select persons to prepare the various segments of the history.
 - c. Approve papers prepared on separate initiative.
 - d. Outline time and scope patterns.
2. Approve and facilitate terms of reference for the CS historical writers--
 - a. Endorse the Handbook for CS Historical Papers.
 - b. Recommend CS Notices and Instructions.
3. Provide guidance to the HS/CSG, through the Executive Secretary--

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- a. Review techniques, indices, procedures and controls developed by the HS/CSG.
- b. Selectively examine historical papers submitted for inclusion in the Index of CS History.
- c. Submit conclusions from meetings.

Clandestine Services Group of the Historical Staff (HS/CSG) will:

1. Prepare the groundwork for CSHB considerations and actions--
 - a. Draft the Handbook for CS Historical Papers.
 - b. Draft proposed notices and instructions to the Clandestine Services.
 - c. Submit progress reports.
 - d. Submit the nature of each index, its purpose, details to be included, methods for its use.
 - e. Submit agenda items and other recommendations and problems for CSHB consideration.
2. Take immediate action to safeguard historical documents--
 - a. Review record material toward the eventual identification of vital CS historical documents still in existence.
 - b. Develop indicators for documents of historical value.
 - c. Review material marked for disposal.
 - d. Establish a center for inactive historical documents with simple reference indicators (where indexing alone will not suffice).
3. Catalog nature and location of basic CS historical documents, the chronological development of the Clandestine Services, and the operational experience and knowledgeability of key CS officers to permit systematic exploitation--
 - a. Establish a reference index of CS documents, including abstracts as appropriate, which cover

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- dates, decisions and actions which shaped the evolution of the Clandestine Services.
- b. Establish a Knowledgeable Persons index.
 - c. Construct a detailed chronology of the organization and leadership of the Clandestine Services.
 - d. Bring to the CSHB, for its consideration, names of individuals who might contribute to the CS historical effort, particularly those about to retire.
4. Facilitate the drafting of CS history--
- a. Indicate appropriate sources, both documental and human resources.
 - b. Guide the use of ES/CSG historical indices and the Handbook.
 - c. Review the application of operational security principles in relation to probable future use of historical papers.
 - d. Examine final papers for conformity.
5. Conduct close liaison with DD/P officers coordinating historical efforts within CS components.

Each Clandestine Services Division and Staff will:

1. Coordinate historical efforts within its field of responsibility--
 - 25X1A a. Maintain the designated series of periodic submissions, e.g., [redacted] Reports, Annual Assessments, RMD's, Annual Programs, Briefing Handbook items, 25X1A Operational Summaries, [redacted], Special Reports for Higher Authority.
 - b. Identify personnel recommended by senior officers and available for writing historical papers.
 - c. Insure the existence of all approved organizational changes and personnel rosters.
 - d. Provide an historian with working space and accessibility to material and personnel.
2. Report as needed to advise the component chiefs, the DD/P, and the CSHB of the status of the overall historical effort by the Clandestine Services.

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PROFILE OF THE CS HISTORY

A. The Clandestine Services

A history will eventually need to be written covering the evolution of the Agency's clandestine efforts in support of NSC 10/2, NSCID 5, etc. This would be a broad-brush wrap-up of histories of the Clandestine Services.

B. DD/P

This will include the operational adjustments to meet shifts in national policy; the intra-Agency and inter-departmental relationships of the DD/P; the functioning of the office of the DD/P; the functioning of committees, boards, panels and other collective bodies established by the DD/P to assist him in the management of the Clandestine Services; the regulations, controls, and executive direction emanating from the DD/P; the conduct of international and other affairs of a clandestine nature at the direction of or in support of the DCI.

C. Headquarters Staffs: FI, CI, CA*

Separate treatment must be given to the larger subordinate groups, e.g., FI--Departmental Coordination, Scientific Intelligence, Div D; CI--Special Projects, International Communism, Police; CA--International Organizations, Propaganda, Political Action, Economic Warfare.

D. Area Divisions (except SR and China)*

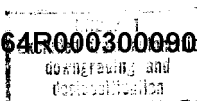
Office of the Chief, Operations, Programming and Support staffs, and evolution of Branch activities, including chronology of adjustments; purpose and effect of fundamental reorganizations; Special Missions; Stations and Bases tied to branch/desk histories-- in some cases regional treatment of groups of nations will be advisable and in most cases sections of stations will be broken out for separate treatment, e.g., Internal Ops Section, External Ops Section, Political Action Section, Special Ops Section.

E. General Divisions: SR, China, TSD,

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In addition to the Office of the Chief and his supporting staffs, the chronology of the organizational

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F. Monographs

Monographs on key operations or operational programs are considered as essential parts of the CS history. They will be earmarked for historical treatment because of their unusual quality, of their particular meaningfulness, because they are well-rounded examples of clandestine operations or are notable efforts carried out in constant reference to or under the review of higher authority.

G. Projects

It is not deemed advisable or expedient to prepare an historical paper on every project. This would make the concept of CS history exhaustive beyond the point of reason or need; such an approach would be impractical. Present plans of the HS/CSG call for the maintenance of a "Project Synopsis File" in each CS component, with pertinent facts covering the approval, pattern of development, shifts in purpose, amendments, funds required and eventually the project termination for every project.

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*A definitive breakdown of the categories of activity under the jurisdiction of each staff will be used as a yardstick in assuring coverage of all CS functions applicable to an area; this will also contribute to an interrelated approach and some uniformity in the various papers. Every area paper will consider the sequence and full scope of the activities being covered against the functional fabric of the Clandestine Services in order to insure a thorough treatment.

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THE SETTING OF AN HISTORICAL PAPER

A. Sequential Arrangement

1. The organizational structure provides the planks in the platforms from which our operations are launched. Changing policy and the resultant shifts in emphasis of the mission will provide direction for the paper.
2. The phasing of the program must be carefully considered and included, together with interim and long-range objectives.
3. In area papers, the epochs or stages in the evolution of a country concerned must be identified and provide part of the framework of the paper.
4. The overtones and undertones of international relationships must be separately handled or woven into the story, e.g., liaison, third country operations, international organizations.
5. Interdepartmental negotiations and arrangements and intra-Agency cooperation and support must be reflected where applicable.

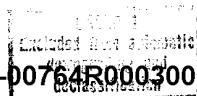
B. Contributing Themes

1. Leadership: its application and effectiveness
2. Personnel: its selection, use and distinguishing characteristics.
3. Cover: type(s), effectiveness, demands and hazards
4. Orientation: geographic location, working and living locations and conditions, time span of the activity(s) involved
5. Chronology of events

C. Supporting Instruments

- | | |
|----------------------|---|
| 1. Technical devices | 8. Graphics |
| 2. Communications | 9. Biographics |
| 3. Security | 10. Geographics |
| 4. Logistics | 11. Research, analysis, evaluation and post mortems |
| 5. Finance | 12. Tradecraft |
| 6. Training | |
| 7. Medical | |

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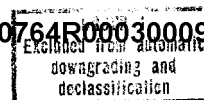
THE INDEX OF SOURCE MATERIAL
OF CS HISTORICAL VALUE

1. It is anticipated the "Index of Source Material of CS Historical Value" will consist of a cross-index of abstract cards of existing documents known to have CS historical significance. These documents will include, but not be limited to, papers dealing with assigned mission and functions, organization, command relationships, policy decisions, intra-Agency and interdepartmental agreements, liaison protocols, operational developments and methods, programs, budgets and directives.

2. This index will be arranged so that its avenues of approach include country, region, Headquarters area, unit and function.

3. The physical storage locations of the material described in this index will depend in part upon agreed security controls, "need-to-know" and special sensitivity. Most items will remain with the originating unit, or in bulk Records Center storage. Others with broad implications throughout the Clandestine Services will be maintained in the CS/TSCO or the HS/CSG for ready access. Eventually such material will be locatable through the "Index of Source Material of CS Historical Value," or if a completed monograph or other completed segment of CS history, through the "Index of CS History."

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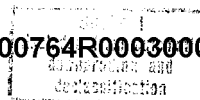


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THE INDEX OF CS CHRONOLOGY

Within the HS/CSG there is being developed an index of organizational events that pertain to the Clandestine Services. At this time the index is maintained on 3 x 5 cards and arranged by the date of the event. A typical entry would show the official date of an organizational change, the nature of the change and the source of the information. The backup material for this chronology will consist mostly of organizational directives, charts and assignment rosters of key personnel.

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DD/P Representative, Historical Staff

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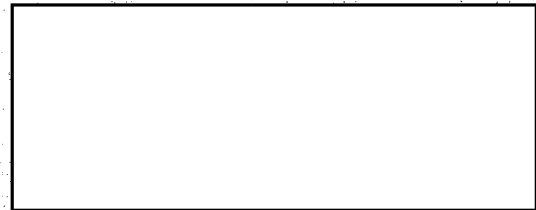
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1. The attached is a progress report covering the first three months of activity of the CS Historical Board and the CS research group in the Historical Staff. Last week Mr. Helms told me that he would like to see this report.

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