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HANDBOOK


OPERATIONS COORDINATING BOARD

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OPERATIONS COORDINATING BOARD



*A descriptive statement of
the organization, functions,
and procedures of the OCB*

September 1955



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ORGANIZATION OF THE OPERATIONS COORDINATING BOARD*

| | |
|--------------------------|--|
| Herbert Hoover, Jr. | Under Secretary of State - Chairman |
| Nelson A. Rockefeller | Special Assistant to the President Vice Chairman |
| Reuben B. Robertson, Jr. | Deputy Secretary of Defense Member |
| Allen W. Dulles | Director of Central Intelligence Member |
| Theodore C. Streibert | Director, U.S. Information Agency Member |
| John B. Hollister | Director, International Cooperation Administration - Adviser |
| Dillon Anderson | Special Assistant to the President for National Security Affairs Adviser |

STAFF

| | |
|-----------------------------|--------------------------|
| Elmer B. Staats | Executive Officer |
| Livingston L. Satterthwaite | Deputy Executive Officer |
| Charles E. Johnson | Executive Assistant |

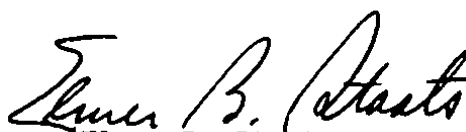
* Executive Order 10483 provides that other agency representatives at the Under Secretary or corresponding level shall serve as members ad hoc when the Board is dealing with subjects bearing directly upon their responsibilities.

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FOREWORD

The underlying descriptive statement of the functions, organization and procedures of the Operations Coordinating Board was prepared by the Executive Officer in cooperation with the Board's participating agencies, and is distributed for their information and convenient reference. At the suggestion of the Board members, this document was prepared to serve as Part I of a short handbook on the OCB. Part II, now in preparation and soon to be released, is intended particularly for the use of OCB working group members and others immediately concerned with the detailed procedures of the Board.

It is contemplated that the handbook will be revised periodically to keep up with current practices.



Elmer B. Staats
Executive Officer





OPERATIONS COORDINATING BOARD
Washington 25, D. C.

FUNCTIONS AND ORGANIZATION OF THE
OPERATIONS COORDINATING BOARD

REASON FOR THE ESTABLISHMENT OF THE OCB

1. Recognizing the need for bringing the Executive Departments and Agencies together to achieve effective actions, President Eisenhower set up the Operations Coordinating Board by Executive Order to further his program to strengthen the Government's national security machinery.* He directed the Board to bridge the gap between policy and operational plans, primarily in the field of foreign operations, by providing for coordinated interdepartmental implementation of national security policies approved by the President after consideration in the National Security Council. Previously, policies established in the NSC were either referred by the President to the State Department for coordination, or, frequently, the paper was referred to more than one agency, and specific arrangements for implementation were left for the agencies to decide case by case.



WHAT THE BOARD IS

2. The Board is the mechanism through which the agencies responsible for carrying out each policy are brought together to develop an agreed statement of what each is to do and to plan for timely and coordinated actions. Through the Board, and the committees and working groups established by it, agency operating plans are consolidated and reviewed for consistency, timing, and adequacy to achieve policy objectives. The members insure that each action makes its full contribution to the desired climate of opinion. In the light of operating experience, the Board then periodically reviews the progress of the program it coordinates, each agency agreeing upon appropriate program changes within its own jurisdiction. The Board then reports progress to the NSC, requests additional policy guidance if necessary, and outlines the principal emerging operating problems. New proposals for action are initiated within the framework of national security policies in response to opportunity and changes in the situation. Special procedures have been adopted by the Board for handling particularly sensitive matters.

3. An important objective in establishing the OCB was to replace as many as possible of the ad hoc coordinating arrangements which previously existed. Although the OCB has become the primary formal channel, it is not intended as

* See E.O. #10483, 10598 and Sec. 303(b) of 10610 attached.

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the exclusive channel for interagency coordination of national security operations. The less formal and often highly effective methods of interagency coordination are fostered and not discouraged by this arrangement. However, where duplicating committees or working groups exist, consolidation with OCB working groups is sought in order to avoid overlapping and confusion as to responsibility.

Meaning of Board Agreement

4. The Board is a cooperative arrangement among responsible action agencies, having no directive authority as a separate body. It provides a forum in which the operating heads of the major departments can meet regularly and agree to take actions in support of a common plan jointly developed. Each Board member, having agreed upon a proposed course of action at a Board meeting, issues appropriate directives to carry out the action within his agency.

HOW THE BOARD IS ORGANIZED AND HOW IT RELATES TO OTHER AGENCIES

Membership

5. The Board consists of the Under Secretary of State (Chairman), the Special Assistant to the President (Vice-Chairman), the Deputy Secretary of Defense, the Director of Central Intelligence, and the Director of USIA. The Special Assistant to the President for National Security Affairs may attend any meeting of the Board, and in practice sits regularly with it. The Special Assistant to the President for Disarmament may also attend any meeting of the Board at his discretion. The Director of the International Cooperation Administration of the Department of State participates in all phases of the work of the Board as an adviser. In addition, by invitation of the Board, a senior representative of the Atomic Energy Commission regularly attends the meetings. Representatives of other agencies participate as ad hoc members of the Board when it is dealing with subjects for which they have Presidential assignments or other significant responsibilities. Executive Order #10483 provides that the ad hoc participants shall be of the rank of Under Secretary or corresponding official, and have the same status on the Board on these occasions as the regular members. The OCB Executive Officer checks at the outset of each project to ascertain the responsibilities of such agencies, and keeps the project under review for the emergence of new interests, in an effort to bring the agencies concerned into the project early in its development.

The Planning Coordination Group

6. On March 4, 1955 the President approved a memorandum from the Director of the Budget (dated March 3), which recommended establishing a Planning Coordination Group. This Group was established within the framework of OCB and is a special grouping of OCB members, chaired by the Special Assistant to the President (Mr. Rockefeller), who is also Vice-Chairman of OCB. This Group

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was established to meet the need, stated in the memorandum, to infuse into plans and programs growing out of national security policies (final implementation of which remains the responsibility of appropriate existing agencies) new ideas to diagnose precisely how best to meet the over-all problems of a given country or area, to bring into balance all aspects of a problem and all resources available to solve it, to find ways effectively to utilize U.S. private organizations and foreign individuals and groups and foreign public and private organizations. In addition, the Planning Coordination Group has been given selected special assignments.

Board Assistants

7. Each member of the Board is aided in his OCB responsibilities by a Board Assistant. These Board Assistants meet regularly as a group to review and ensure the adequacy of papers destined for the consideration of the Board, to assist the Board in carrying out agreed action programs, and in some cases to act on behalf of their principals. The Assistants also act within their respective agencies to ensure staff support of their principals on OCB matters, to assist them in the continuing departmental and interdepartmental coordination of Board problems, and to assist the agency's OCB working group members to meet the requirements of the Board.

Relationship to the NSC

8. The Board's coordinating and reporting responsibilities under Presidentially-assigned NSC policies are mentioned above. The Board by Executive Order serves as an important working extension of the National Security Council machinery. The President's Special Assistant for National Security Affairs, who is also the Chairman of the National Security Council Planning Board, regularly attends meetings of the OCB; a member of his staff participates regularly in the meetings of the Board Assistants. The OCB Deputy Executive Officer, in turn, serves as an advisor to the NSC Planning Board and briefs the Planning Board on OCB Progress Reports when these are scheduled for consideration. The Board reports to the Council on each assignment from the President, approximately every six months, and reviews its total activities in a semi-annual report to the Council. It is under standing instructions from the President to report at any time to the Council on matters which should be brought to the Council's attention.

HOW THE BOARD OPERATES

Origin of Projects

9. The Board receives the majority of its assignments directly from the President, who normally charges it with the coordination of the implementation of the NSC papers when he approves them.

10. As set forth in Section 2 of the Executive Order, the OCB may initiate new proposals for courses of action which are within the framework of national security policies.

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11. Within the spirit of its Presidential charter, the Board also undertakes the coordination of selected national security problems at the request of governmental groups or agencies outside its regular membership.

Outline Plans of Operation

12. As soon as possible after the approval by the President of a national security policy and its subsequent assignment to the OCB, the Board usually through a standing OCB working group begins the preparation of an Outline Plan of Operations, an instrument specifically developed to facilitate interdepartmental coordination of forward planning of operations.

13. The Plan is needed and used by the Board to get concurrence by each agency as to what actions it is to undertake, to plan the most effective manner and timing of execution, and to set a standard for measuring progress toward national security objectives.

14. During the preparation of each Plan, the working group draws upon the experience and advice of authorities responsible for implementation. The interested overseas mission is usually given an opportunity to comment on the draft Plan prior to its consideration by the Board.


15. A typical Outline Plan is a compact catalogue of the courses of action, agency responsibilities, and timing considerations for the implementation of an NSC policy. Each Plan sketches the present situation in the subject country and gives a summary presentation of the timing, desired priority emphasis, and any necessary special operating guidance. It provides a detailed listing of the actions agreed upon and identifies the agencies responsible for operations under each pertinent paragraph of the governing NSC policy. It provides a written guide to concerted action by all the agencies and levels concerned.

16. The process of preparing an Outline Plan is in itself of considerable assistance to the Board. It helps to clarify the substantive provisions of NSC policies and to identify and resolve differences over policy, operating responsibility, or actions to be taken. The preparation also helps to expose in a timely manner operating difficulties which might threaten the success of a policy, and thus contributes to their solution.

17. Outline Plans are normally prepared for all NSC country policies assigned to the OCB. They have proved helpful in some projects initiated by the Board, such as in the case of the Ideological Program.


18. Actions agreed upon by the Board or one of its working groups, or clearly allowable under NSC courses of action, are carried on as usual while an Outline Plan is being prepared. The Plan does not encompass every U.S. agency activity, but it includes the major programs, and stresses those which require interagency coordination. It may be modified to meet changed circumstances through appropriate interagency procedures without necessarily amending the Plan formally.

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Progress Reports

19. Reporting is a major responsibility of the Board under the Executive Order, and the OCB has developed a standard procedure covering its assignments. The progress reports serve three main purposes:

- a. They indicate progress and the effectiveness of operating programs, pointing up operating difficulties and reflecting other considerations affecting the achievement of U.S. policy objectives. They provide a basis for judgment from the operating viewpoint with respect to the need for review of the NSC policy concerned. Emphasis is placed on obtaining frank analyses of operating situations to serve as a basis for guidance to OCB working groups or operating agencies, and for informing the NSC.
- b. They inform the NSC of the operational effectiveness of approved policies, and advise the Council whether or not, in view of operating experience, a review of policy is recommended. Any recommended policy revision is prepared for Council consideration by the NSC Planning Board in accordance with its established function.
- c. They provide a forward look at emerging problems and future actions and call the attention of the Board and the Council to those matters which require advance interagency planning and coordination.



20. In form, each Progress Report on an NSC policy is generally held to 4 or 5 pages, to save time for the Board and the Council. It consists of a Section A summarizing the major actions and decisions during the reporting period, a Section B evaluating progress in implementing NSC policies and objectives, and a Section C listing the major emerging problems and future actions. This concise report is supplemented by an annex containing detail with respect to actions taken.

Special Papers for Board or Council

21. In addition to its standard planning and reporting documents, the Board occasionally considers special papers prepared by the working groups or the agencies to meet some pressing need for information or action to be provided by the Board or recommended to the NSC.

22. Some examples of important subjects which have required special OCB action papers are natural disasters or other overseas emergencies requiring quick, coordinated U.S. action, funding problems requiring readjustments of program priorities or Presidential determination, special problems related to international conferences, the overseas impact of proposed public announcements, and the drafting of special papers to spell out more concretely the implications of general provisions in NSC papers.

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23. From time to time the Board also arranges for the preparation of information documents or for oral briefings for the OCB agenda, as a basis for effective discussion by the members themselves of current problems of common interest.

Weekly Status Report

24. Prior to each meeting of the Board, the Executive Officer prepares a listing of the various OCB assignments or projects indicating significant developments or problems or reporting the status of staff work. Based upon contributions from the OCB working groups and staff, this report provides a current highlight summary of developments relating to the implementation of policies assigned to the OCB. It also picks up current or anticipated operating problems of particular interest to the members of the Board.

25. The Status Report is not designed to be a means for obtaining Board action on emergency problems which do not permit the usual advance documentation and staffing. When such action is unavoidable, however, the Executive Officer gives the maximum possible advance notification to the agencies.


26. In general the Status Report contains only those items which are sufficiently important to the interests and responsibilities of the Board members collectively to deserve their immediate attention as a group. The items are written briefly and clearly and are self-explanatory. The following criteria are used in selecting items for the Status Report:

- a. Is the action a specific and important one taken under an NSC paper or Outline Plan of Operations?
- b. Is it a major action in disagreement?
- c. Is it an action on which there has been undue delay or inactivity on the part of the responsible agencies?
- d. Is it a significant item which has not been generally made known to the Board? For example, an agreed-upon action not yet taken or publicly announced.
- e. Does the item report an emerging problem of sufficient importance to warrant the attention of the Board members?
- f. Is it an action which is important because it is in response to a Board action or a request of a member of the Board?

ROLE AND FUNCTIONS OF WORKING GROUPS

27. Board projects are usually referred to the appropriate OCB working group which is a standing or ad hoc committee of agency personnel having operating responsibilities, plus an OCB staff member, for necessary staff work.


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The working group's functions generally are to assure that approved courses of action are carried out, that interagency matters are fully coordinated and that the Board is kept informed through adequate reporting of the status of its assignments. Its specific duties are defined in terms of reference approved by the Board which define the work to be done, the reporting schedule and the agencies to be represented on the group. The working groups have no responsibility for carrying on operations to implement NSC policies of other Board-agreed actions; these are the responsibilities of the operating agencies involved. At present there are approximately 36 such working groups.

28. The working group member from the member agency having the principal operating responsibility chairs the working group. He is responsible with the assistance of the OCB staff representative on the working group, for the effectiveness of the work of the group. He has the normal duties of any chairman to insure proper reaction by the group to the directions of the Board.

29. An agency representative on a working group has two chief functions: (1) to secure action in his agency, and (2) to share information about his agency's plans and operations with other members of the working group. The bulk of interagency coordination on OCB assignments is carried on through the working group representative or with his knowledge.



30. Working group members are qualified by experience and position in their agency to facilitate obtaining decisions by their agency and also agreement in the group concerning the allocation of operating responsibility for courses of action. In most cases the agency representatives on working groups are considered to be informed but uninstructed with respect to his agency's views on matters requiring interdepartmental coordination. He is thereby in a position to participate on a basis which makes it possible to make adjustments which the process of interagency coordination requires.

31. Working group members need not limit their participation in the group's activities only to their own agency's interests or operating responsibilities. A cross-fertilization of ideas is encouraged by the Board.

32. Important emphasis is given to anticipating emerging operating problems and devising means for overcoming them. The working group is expected to be alert to initiating new proposals for action within the framework of national security policies in response to opportunity and changes in the situation.

33. Most working groups have adopted a regular schedule for meetings while others have agreed to meet on the call of the chairman or OCB staff representative. Each OCB working group convenes at least once each month to review its responsibilities and to assure that the various agencies' programs are being executed in accordance with prescribed policy and plans of operation.

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34. The working group is responsible for calling attention to the Board through the Executive Officer any problem or situation which prevents the working group from carrying out responsibilities assigned to it under prescribed policies or plans.

35. Some of the working group's specific activities are:

- a. Following up on status and effectiveness of actions pursuant to NSC courses of action or specific Board requests, including securing current information for inclusion by the Executive Officer in weekly Status Reports for the Board, identifying gaps in operations, raising urgent problems requiring attention, etc.
- b. Drafting papers (memoranda, progress reports, outline plans of operations, etc.) for the consideration of the Board.
- c. Keeping generally informed of current developments with respect to the area covered by its OCB assignment.
- d. Providing a clearing point for information of interdepartmental concern to OCB member agencies.
- e. Collecting agency views and suggestions and drafting of checklists of possible detailed courses of action for inclusion in Outline Plans of Operations.
- f. Developing recommendations for assignments of agency responsibility and timing for courses of action in NSC papers.

ROLE OF OCB STAFF

36. The OCB staff, under the direction of the Executive Officer, is a small group of professional employees who assist in providing continuing and full-time service and support to the Board and the OCB working groups. Some of the staff were selected for a tour of duty from the member agencies, and will eventually return to them upon completion of their OCB assignments. Others are employed for indefinite service with the Board. All the members of the staff are expected to serve the Board as impartial, full-time assistants, concentrating on those aspects of Board projects which involve interdepartmental coordination. They also help pass on the benefits of experience from one OCB project or working group to another. Certain officers of the staff have continuing regional or functional assignments and serve as members of OCB working groups. Others provide for interdepartmental intelligence support for Board projects or provide secretariat and administrative services for the Board and the working groups. In addition to these general service functions, the staff maintains certain continuing liaison arrangements with other agencies and staffs. For instance, the Deputy Executive Officer serves as an adviser to the NSC Planning Board. Others on the staff keep in touch with the NSC Secretariat and prepare the semi-annual factual report on OCB work as well as keeping touch with the secretariats for the National Advisory Council, the Council for Foreign Economic Policy and other interdepartmental organizations.

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IMMEDIATE RELEASE

September 3, 1953

James C. Hagerty, Press Secretary to the President

THE WHITE HOUSE OFFICE

LOWRY AIR FORCE BASE
DENVER

EXECUTIVE ORDER

ESTABLISHING THE OPERATIONS COORDINATING BOARD

By virtue of the authority vested in me by the Constitution and statutes, and as President of the United States, it is hereby ordered as follows:

Section 1. (a) In order to provide for the integrated implementation of national security policies by the several agencies, there is hereby established an Operations Coordinating Board, hereinafter referred to as the Board, which shall report to the National Security Council.

(b) The Board shall have as members the following: (1) the Under Secretary of State, who shall represent the Secretary of State and shall be the Chairman of the Board, (2) the Deputy Secretary of Defense, who shall represent the Secretary of Defense, (3) the Director of the Foreign Operations Administration, (4) the Director of Central Intelligence, and (5) a representative of the President to be designated by the President. Each head of agency referred to in items (1) to (4), inclusive, in this section 1(b) may provide for an alternate member who shall serve as a member of the Board in lieu of the regular member representing the agency concerned when such regular member is for reasons beyond his control unable to attend any meeting of the Board; and any alternate member shall while serving as such have in all respects the same status as a member of the Board as does the regular member in lieu of whom he serves.

(c) The head of any agency (other than any agency represented under section 1(b) hereof) to which the President from time to time assigns responsibilities for the implementation of national security policies, shall assign a representative to serve on the Board when the Board is dealing with subjects bearing directly upon the responsibilities of such head. Each such representative shall be an Under Secretary or corresponding official and when so serving such representative shall have the same status on the Board as the members provided for in the said section 1(b).

(d) The Special Assistant to the President for National Security Affairs may attend any meeting of the Board. The Director of the United States Information Agency shall advise the Board at its request.

Section 2. The National Security Council having recommended a national security policy and the President having approved it, the Board shall (1) whenever the President shall hereafter so direct, advise with the agencies concerned as to (a) their detailed operational planning responsibilities respecting such policy, (b) the coordination of the interdepartmental aspects of the detailed operational plans developed by the agencies to carry out such policy, (c) the timely and coordinated execution of such policy and plans, and (d) the execution of each security action or project so that it shall make its full contribution to the attainment of national security objectives and to the particular climate of opinion the United States is seeking to achieve in the world, and (2) initiate new proposals for action within the framework of national security policies in response to opportunity and changes in the situation. The Board shall perform such other advisory functions as the President may assign to it and shall from time to time make reports to the National Security Council with respect to the carrying out of this order.

Section 3. Consonant with law, each agency represented on the Board shall, as may be necessary for the purpose of effectuating this order, furnish assistance to the Board in accordance with section 214 of the Act of May 3, 1945, 59 Stat. 134 (31 U.S.C. 691). Such assistance may include detailing employees to the Board, one of whom may serve as its Executive Officer, to perform such functions, consistent with the purposes of this order, as the Board may assign to them.

Section 4. The Psychological Strategy Board shall be abolished not later than sixty days after the date of this order and its outstanding affairs shall be wound up by the Operations Coordinating Board.

Section 5. As used herein, the word "agency" may be construed to mean any instrumentality of the executive branch of the Government, including any executive department.

Section 6. Nothing in this order shall be construed either to confer upon the Board any function with respect to internal security or to in any manner abrogate or restrict any function vested by law in, or assigned pursuant to law to, any agency or head of agency (including the Office of Defense Mobilization and the Director of the Office of Defense Mobilization).

/sgd/ DWIGHT D. EISENHOWER

THE WHITE HOUSE

September 2, 1953

(Published 5 September 1953 in Federal Register as Executive Order 10483.)

EXECUTIVE ORDER 10598

AMENDING EXECUTIVE ORDER NO. 10483,
ESTABLISHING THE OPERATIONS COORDINATING BOARD

By virtue of the authority vested in me by the Constitution and statutes, and as President of the United States, it is ordered that subsections (b) and (d) of Section 1 of Executive Order No. 10483 of September 2, 1953 (18 F.R. 5379) be, and they are hereby, amended to read, respectively, as follows:

"(b) The Board shall have as members the following: (1) the Under Secretary of State, who shall represent the Secretary of State and shall be the chairman of the Board, (2) the Deputy Secretary of Defense, who shall represent the Secretary of Defense, (3) the Director of the Foreign Operations Administration, (4) the Director of Central Intelligence, (5) the Director of the United States Information Agency, and (6) one or more representatives of the President to be designated by the President. Each head of agency referred to in items (1) to (5), inclusive, in this Section 1 (b) may provide for an alternate member who shall serve as a member of the Board in lieu of the regular member representing the agency concerned when such regular member is for reasons beyond his control unable to attend any meeting of the Board; and any alternate member shall while serving as such have in all respects the same status as a member of the Board as does the regular member in lieu of whom he serves."

"(d) The Special Assistant to the President for National Security Affairs may attend any meeting of the Board."

DWIGHT D. EISENHOWER

THE WHITE HOUSE,

February 28, 1955.

(F. R. Doc. 55-1831; Filed, Feb. 28, 1955; 11:07 a. m.)

Reprinted from the Federal Register, Volume 20, Number 41, Tuesday, March 1, 1955.



EXECUTIVE ORDER 10610

Signed May 9, 1955

Effective June 30, 1955

Administration of Mutual Security and Related Functions

Sec. 303.(b) -- "The memberships of the Director of the Foreign Operations Administration on the following bodies, together with the functions of the said Director in his capacity as member of each thereof, are hereby abolished: (1) The National Security Council, (2) the Operations Coordinating Board, (3) the Council on Foreign Economic Policy, (4) the Interagency Committee on Agricultural Surplus Disposal, (5) the Defense Mobilization Board, and (6) the Interdepartmental Committee on Trade Agreements: Provided, That the Director of the International Cooperation Administration or his designated representative shall participate in the deliberations, and assist in connection with the affairs, of the bodies mentioned in items (2) to (6), inclusive, above, and of the Committee for Reciprocity Information."





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OPERATIONS COORDINATING BOARD
Washington 25, D. C.

November 6, 1956

NOTE TO ALL HOLDERS OF OCB HANDBOOK

SUBJECT: New Codification of Part II - Detailed Operating
Procedures

Attached is a new codification of Part II - Detailed Operating Procedures, which incorporates the various revisions which have been individually circularized in Memoranda to Chairmen and Working Group Members and to the OCB Professional Staff in accordance with Board and Board Assistants' discussions.

This new codification also incorporates minor editorial revisions to reflect more fully and effectively the development of procedures during the past few months.

The attached Part II of the Handbook should be substituted in its entirety for Part II dated September 15, 1955, which should be destroyed.



Charles E. Johnson
Executive Assistant

Attachment:

Part II - Detailed Operating Procedures

November 1, 1956

PART II. OCB DETAILED OPERATING PROCEDURES

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II. OCB DETAILED OPERATING PROCEDURES

A. WORKING GROUPS

Purpose

1. OCB working groups are established to assist in the coordinated implementation of NSC policies assigned by the President to the OCB, and for coordination, development or study of other projects which have been approved by the Board. Ad hoc working groups are established for handling emergency or crash projects and short-term assignments.

Role and Responsibility

2. The OCB working group's role is to help the Board carry out its responsibilities under Executive Order 10483, Section 2. Its chief functions are interagency coordination and reporting. Responsibility for carrying out operations to implement NSC policies or other Board-agreed actions remains with the agencies concerned.

3. The OCB working groups, in their consideration of programs and actions to carry out assigned NSC and other responsibilities, should not limit their considerations to matters clearly authorized by existing policy. They should consider all possible courses of action appropriate to the circumstances so that the Board may receive the full benefit of working group thinking. Such proposals may be submitted to the Board at any time and should be plainly identified as being not clearly covered by existing policy.

4. Working group members are urged to give attention to the minute on Agenda Item 3, Report Item 21, of the October 10 meeting (as revised at the October 17 meeting) wherein the Operations Coordinating Board concurred in the agreement:

"That, particularly in the face of the Soviet bloc economic offensive, political and psychological ends should be given appropriate weight in the formulation, determination, and administration of U.S. aid programs; and that, while the fundamental aim of such programs, whether military or economic, should not be diverted to short-term considerations, country plans and objectives should nevertheless include such considerations; and that all persons in the field and in Washington concerned with foreign assistance programs, and the overseas information program, and all OCB working groups dealing with implementation of country and area policies be guided by this conclusion."

5. Working group responsibilities include preparation of the following for submission to the Executive Officer for Board consideration:

- a. Outline Plans of Operations. (See Section B)
- b. Semi-annual Progress Reports to be submitted to the NSC. (See Section C)

- c. Special Reports required by the Board or initiated by the working group.
- d. Other papers, as needed, containing recommendations on matters requiring decision or concurrence of higher authority than that of the working group members.
- e. Each month the working group reviews and concurs in the projected dates listed in the Tentative OCB Reporting Schedule for completion of working group papers or recommends specific alternate dates to enable advance scheduling of the above papers for consideration by the Board Assistants and the Board.

6. The Operations Coordinating Board initiates new proposals for action within the framework of national security policies in response to opportunity and changes in the situation. OCB working groups are expected to be alert to and to develop possibilities for exploitable "targets of opportunity" and to recommend appropriate action. The OCB Intelligence Liaison and Special Projects Staff, through the OCB Staff Representatives, calls opportunities for exploitation to the attention of the working groups.

7. In general, the chairman is responsible for the effectiveness of the working group by exercising initiative and leadership, by developing team spirit, and keeping all members informed directly or through the OCB staff representative as to significant events or actions taken. The chairman's role varies somewhat from case to case, depending upon the problems involved. Among specific responsibilities of chairmen are:

- a. Assuring that implementing actions are consonant with NSC policy;
- b. Convening of working group meetings on his own initiative or on request of any working group member;
- c. Assuring the exchange of action documents or information on action programs;
- d. Directing the preparation of working group papers and assuring their accurate scheduling and submittal for Board action;
- e. Isolating areas of disagreement for appropriate submission to the Assistants, or the Board if necessary;
- f. Arranging for meetings of selected working group members to handle sensitive material on a strictly need-to-know basis and providing for the handling of the documentation and reporting involved in such matters.

Role of OCB Staff Representative as Working Group Member

8. Specific activities of the OCB staff representative as a member of the working group vary from case to case. In general, he acts as an inter-departmental staff assistant to the chairman, and he consults closely with the chairman on all matters concerning working group activities. Experience indicates that there are several types of things which the OCB staff representative can do in the above categories:

- a. Preparation of agenda for working group meetings;
- b. Development of draft papers on the basis of working group discussion or when requested;
- c. Keeping members informed of actions taken in the agencies, and promptly reporting pertinent decisions or discussions at meetings of the Board and the Board Assistants;
- d. Preparation of calendars of events or actions scheduled for the future, which would call for prior coordination of action. Example: speeches, conferences, committee hearings, etc.;
- e. Liaison with OCB Intelligence Liaison and Special Projects Staff, particularly regarding targets of opportunity, new proposals for action which the working group might usefully consider, and intelligence requirements;
- f. Reporting actions taken for Weekly Activity Report to the Board;
- g. Serving as Chairman temporarily or on a continuing basis if provided for in the terms of reference or when so requested by the chairman or the group;
- h. Serving as a channel for intelligence requirements of the working group;
- i. Providing secretariat services for the working group.

Role of Agency Representative as Working Group Member

9. Since the primary emphasis in OCB working groups is the development and execution of action programs, agency representatives on working groups should have appropriate action responsibilities within their agency. Generally these individuals are selected at a reasonably high level and are busy with day-to-day administrative or operating responsibilities. To permit such representatives to concentrate on the most productive action programs:

- a. working group meetings and paper work, including reporting, should be kept to minimum consistent with discharging OCB's coordinating responsibilities, and
- b. the possibilities of ad hoc sub-groups and various agency resources should be kept in mind.

10. An agency representative has two chief functions: to secure action in his agency, and to obtain information about his agency's plans and operations and share it with other members of the working group as needed for coordination and for reports. The bulk of working-level interagency coordination should be carried on with his agency through him or with his knowledge as far as it concerns the OCB assignment in question.

11. An agency representative in the working group is not expected to advocate a rigid agency "position" but to mediate flexibly in the give-and-take process which successful interagency coordination requires. He should also be a source of originality and initiative in developing new suggestions for action.

12. Other normal functions of an agency representative are:

- a. To be informed of his own agency's resources and capabilities;
- b. To follow through on all action required of his agency;
- c. To inform, through appropriate channels, his agency's Board Assistant and Board Member of the status of action being taken by the agency and problems relating thereto;
- d. To obtain an agency position on a given subject if that is required to permit proper functioning of the working group.

Procedures

13. Establishment of Working Group

The working group's assignment is briefly set forth in a Terms of Reference statement which is cleared by member agencies.

Since it is important for a working group to get the clearest view possible of what it is expected to accomplish, its first meeting should be attended by the Board Assistant from the chairing agency, by other Board Assistants, if they wish, and by the Executive Officer or his deputy.

14. Intelligence Support

Intelligence support required by OCB working groups, particularly requests for intelligence which require some research and time to fill, will normally be supplied by the OCB Intelligence Liaison and Special Projects Staff. The OCB Intelligence Liaison and Special Projects Staff deals directly with the Central Intelligence Agency and other appropriate intelligence centers in the Government that can provide the material to enable the working groups to function effectively.

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After consultation with the working group, the CIA member, or the OCB Staff Representative, with the Chairman's agreement, will check with the OCB Intelligence Liaison and Special Projects Staff with regard to intelligence requirements of the working group. This is to prevent duplication of arrangements by the OCB Intelligence Liaison and Special Projects Staff, and will aid in determining whether the requirement is appropriate and whether CIA or some other department should provide the intelligence support.

In addition to securing intelligence for working groups, the OCB Intelligence Liaison and Special Projects Staff secures intelligence upon request for the Special Assistant to the President.

15. Security Clearance

The Personnel Security Policies and Procedures of the OCB, dated February 2, 1955, para. 3, require that members of working groups and panels shall not enter upon the performance of OCB duties until a Top Secret clearance is granted by the member agency on the basis of a full-scale background investigation (within the purview of Executive Order 10450, or similar standards where E.O. 10450 does not apply).

The agency's principal representative and an alternate are designated by the Board Assistant in writing to the Executive Officer, immediately upon the establishment of a working group. Replacements, as required, for working group members are also designated in writing by the Board Assistants.

Top Secret clearances for working group members are certified in writing to the Executive Officer by the Security Officer of the member agency at the time of the designation.

The principal representative on the working group, or the alternate acting for him, is responsible for assuring that any additional representative of his agency who may be required to attend or participate in a working group meeting has a Top Secret clearance which fulfills the OCB requirements.

16. Agenda and Record of Working Group Meetings

An advance agenda for the meetings is usually circulated by the OCB Staff Representative to the working group and interested OCB staff members, and by request of a working group member to other OCB agency officers with an interest in the subject.

A "Memorandum of Meeting" is prepared by the OCB Staff Representative or the Chairman, which records for each meeting: the time, date, place, attendance and a resume of the working group's deliberations. This memorandum is filed in the OCB staff records and given the same distribution as the agenda.

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17. Content of Transmittal Memoranda

Action documents are sent out for appropriate action by the Board Assistants or the Board under a memorandum from the Executive Officer containing the following elements:

- A. AGENDA ITEM FOR:
- B. BACKGROUND: [This should be brief in order to ensure that the following heading C. can appear in its entirety on the front page.]
- C. RECOMMENDED BOARD [or BOARD ASSISTANTS'] ACTION:
- D. PREPARED BY: [Source]
- E. BOARD ASSISTANTS' ACTION: [on papers going to Board]
- F. OUTLINE PLAN OF OPERATIONS: [See Page 12, Para. 7]
- G. DESTRUCTION AUTHORIZED FOR:

When the working group submits a paper to the Executive Officer for action, the working group chairman's transmittal memorandum to the Executive Officer should contain the information needed in the above outline.

18. Points of Contact Coordination Method

The use of points of contact is a method of coordination which does not require the establishment of a working group. The appropriate agencies designate action officers to represent them as points of contact for interagency coordination on an OCB assignment.

This method may be used: (1) on assignments where OCB has responsibility for coordination but implementation is principally in one member agency and formal, continuing interagency staff work is not required; (2) for immediate implementation of urgent and clear courses of action and reporting thereon to the Board; (3) on assignments to the OCB staff, or to the Board Assistants, to prepare staff studies and recommendations for Board consideration; or (4) after discontinuance of a working group to provide reporting as may be required. The work to be done, the point of primary responsibility for initiating action and any special instructions and reporting requirements are usually specified in writing.

The OCB Personnel Security Policies and Procedures are not applicable to individuals designated as points of contact. However, it is essential that such individuals have authorized access within their agency to Top Secret material.

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B. OUTLINE PLAN OF OPERATIONS

Format and Content of Outline Plan of Operations

(CLASSIFICATION)

OPERATIONS COORDINATING BOARD
Washington 25, D. C.

(Date)

OUTLINE PLAN OF OPERATIONS WITH RESPECT TO (Country or Area)

I. INTRODUCTION

- A. References: (1) U.S. Policy toward (Country or Area),
(NSC # _____), Approved by the President,
(Date) _____
- (2) NIE (Title and Date)
- (3) NSC # _____ (The current Basic National Security
Policy paper)

B. Special Operating Guidance: Use this section to indicate guidance with respect to priorities, timing, emphasis, special situations, attitudes vis-a-vis the U.S., and similar operating guidance. This section should also contain particular reference where pertinent to over-all NSC actions or policies bearing upon operations under the Plan, e.g., NSC 5602/1, 5429/5, 5506, NSC Action 1486c, NSC Action 1550.

C. Major U.S. Commitments: List here only those current formal commitments of the United States with the subject country which commit the U.S. in a major way to courses of action involving funds or political actions.

For example, in this section, list such agreements as a military aid, reimbursable or non-reimbursable, agreements such as an economic and technical assistance agreement, a Fulbright agreement, Peaceful Uses of Atomic Energy agreement. Also list such commitments as one to support admission to membership in U.N., or to use U.S.:

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good offices to settle an inter-country dispute. A full list of U.S. bilateral commitments and agreements with that country will be attached as Annex A. Do not list items such as Treaty of Friendship, Navigation and Commerce, Treaty granting preferred postal rates to Civil War veterans writing to relatives in Ethiopia, or Convention on Literary and Artistic Copyrights, protection of trade marks, protection of industrial designs and models unless special financial or political problems are involved.

II. ACTIONS AGREED UPON

Individual action items when extracted from this Plan may be downgraded to the appropriate security classification.

NSC Citations

Para. #: "On the left one-third of the page in quotations cite NSC course of action". (Except in downgraded versions in which appear only the paragraph citations.)

OCB Courses of Action

1. List on the right two-thirds of the page the agreed-upon actions to be taken under each "NSC Course of Action".

Assigned to: State

Support: USIA (Omit if none)

Target Date: June 30, 1956 (be as specific as possible in order to make clear the sequential relationships between actions.)

2. Only activities to be undertaken or continued in the future rather than past activity, should be included in the Outline Plan.

Assigned to: ICA

Support: Defense (Omit if none)

Target Date: March 15, 1957

3. Each action paragraph requires a specific target date.

Assigned to: Defense

Target Date: January 1957

4. Each paragraph through this section should be numbered consecutively to facilitate reference.

Assigned to: State

Target Date: September 10, 1956

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(CLASSIFICATION)

III. ACTIONS NOT AGREED UPON

List the actions recommended by one or more members of the working group but not concurred in by other members and which the sponsors still wish submitted for Board review, together with "pro" and "con" points of view. A concise expression of divergent points of view will facilitate Board consideration of unresolved differences within the working group. This would be an appropriate place to present proposals that may be desirable but appear to be outside existing policy.

IV. ADDITIONAL PROPOSALS UNDER CONSIDERATION IN THE WORKING GROUP

This section should be selective. The items should include only those which the working group believes to be of significant importance and which have elements of desirability and feasibility which make them worthy of further study. This section should not include items which merely await resolution of programming considerations unless the program implications are quite significant. Agency positions, if any, or sponsorship of such proposals will not be shown.

V. ANNEX

A. Bilateral Commitments and Agreements between the U.S. and (Country)

This annex will contain a comprehensive list of formal bilateral commitments and agreements of the U.S. with the subject country.

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(Standard Insert Page for each Outline Plan)

CLASSIFICATION

PURPOSE AND USE OF THIS OUTLINE PLAN OF OPERATIONS

This Outline Plan of Operations sets forth courses of action, responsibilities and timing prepared by the OCB in order to carry out NSC policy with respect to (fill in country and NSC No.) for which the President has designated the OCB as the coordinating agency.

This Outline Plan does not encompass every U.S. agency activity or program but does include major programs, particularly those requiring interagency coordination. It includes contemplated important actions as well as those already in the process of being carried out.

Each agency has agreed to carry out the actions and programs contained in the plan subject to modification or review should a change in circumstances so indicate. Such changes will be agreed through normal interagency coordination, where appropriate, and will be made in accordance with usual procedures and through usual channels, and not necessarily with any formal amendment of this Outline Plan. A new plan will be prepared as soon as practicable following approval of a new or revised NSC statement of policy.

The Department of State will normally transmit the full text of approved Outline Plans to the chiefs of mission concerned for use in exercising their coordinating responsibilities. Other agencies may transmit the complete plan or extracts thereof to senior field representatives on a strict "need-to-know" basis whenever such distribution is essential to effective implementation; provided that distribution to field representatives, when made, will normally be limited to those who are already holders of the basic NSC policy on which the Outline Plan is based.

Concurrence in this plan by the responsible agencies represented in the OCB does not automatically constitute authorization to operating officials to undertake new programs or modify existing programs, but shall serve as a basis for appropriate operating instructions to be developed by each of the participating agencies.

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B. OUTLINE PLAN OF OPERATIONS

Purpose

1. The Outline Plan of Operations is an instrument developed to assist the Board to carry out certain responsibilities of the Board stated in Section 2 of Executive Order 10483, as follows:

"The National Security Council having recommended a national security policy and the President having approved it, the Board shall (1) whenever the President shall hereafter so direct, advise with the agencies concerned as to (a) their detailed operational planning responsibilities respecting such policy, (b) the coordination of the interdepartmental aspects of the detailed operational plans developed by the agencies to carry out such policy, (c) the timely and coordinated execution of such policy and plans, and (d) the execution of each security action or project so that it shall make its full contribution to the attainment of national security objectives and to the particular climate of opinion the United States is seeking to achieve in the world, and (2) initiate new proposals for action within the framework of national security policies in response to opportunity and changes in the situation..."

2. The Outline Plan is a means for the Board to obtain the concurrence of the responsible agencies on what actions each will undertake for as far in the foreseeable future as firm actions can be agreed upon, to plan the most effective manner and timing of the execution of such actions, and to set a standard to assist in measuring progress toward the objectives of the national security policy or policies involved.

3. A typical Outline Plan is a compact, coordinated and agreed catalogue of the courses of action, agency responsibility, and timing considerations for the implementation of an NSC policy. It is drafted to meet the requirements of the operating officers both in Washington and in the field and contains detail that might be omitted if the document were being drafted as a staff paper for Board action. The introductory section of the Plan includes a summary statement of special operating guidance in implementing policy with respect to such matters as timing, desired priorities, emphasis, handling of special situations and reference to applicable overall policies or NSC actions. The introductory section also includes a summary of the major commitments, if any, involving funds or official acts. The main body of the Plan consists of the actions agreed upon and identifies the agencies responsible for each action under pertinent paragraph of the governing NSC policy.

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4. The preparation of an Outline Plan helps clarify the substantive provisions of NSC policies and identify and resolve differences over policy, operating responsibility, or actions to be taken. It also helps to expose any operating difficulties which might threaten the success of a policy, and thus contributes to their solution. Finally, the Outline Plan provides agreed and coordinated agency and inter-agency operations to carry out the national objectives.

Timing

5. After the approval by the President of a national security policy and its subsequent assignment to the OCB, the appropriate OCB committee or working group prepares a new or revised Outline Plan.

6. The OCB committees and working groups also review existing Outline Plans for possible revision when semi-annual progress reports are being developed, when new National Intelligence Estimates are available, or when changed circumstances, such as major legislative and appropriation actions and political developments make review advisable.

7. If a review of the Outline Plan in connection with the preparation of a progress report demonstrates a need for revisions, these are, if possible, submitted for consideration by the Board together with the progress report. If the revisions are not available at that time, the working group includes in its transmittal of the progress report a recommendation on the need for revision, the reasons therefor, and a suggested schedule for the preparation of the revision. This recommendation may suggest the desirability of a Board discussion prior to the revision when, for example, the progress report when approved by the OCB may recommend a review of policy by the National Security Council.

Procedure for Preparing or Revising an Outline Plan

8. While there is no set procedure for preparing an Outline Plan, the OCB working group generally begins by collecting statements of each agency's operating programs and plans. It then usually assigns to one member, often the OCB Staff Representative, responsibility for developing a first draft of the summary statement of special operating guidance and major commitments. When a consolidated first draft of the original or completely new Outline Plan is prepared, it is sent to the field for comment. When the field comments are received the working group members, after checking the text informally with their respective Board Assistants, submit the draft Outline Plan of Operations to the Executive Officer for formal consideration by the Board Assistants and the Board. When the working group initiates a revision of an Outline Plan, the appropriate field mission(s) is requested to forward on an urgent basis any suggested comments or revisions they wish to see made in the existing Outline Plan. These field suggestions will be considered in drafting the revised Outline Plan. The revision of the Outline Plan will not be delayed to obtain field reaction to the proposed new draft. The revised draft should be scheduled for Board consideration if possible at the same time as a semi-annual progress report.

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9. Agreed actions by the Board or a working group, or those clearly allowable under NSC courses of action, are carried on by the operating agencies while an Outline Plan is prepared. The Plan does not encompass every U.S. agency activity, but it includes the major programs, and stresses those which require interagency coordination.

10. Caution is exercised in developing an Outline Plan to avoid excessive detail, particularly numbers which might have to be continually modified as a result of re-programming or new legislation. It is desirable that a general order of magnitude figure be indicated for each agreed program in the Plan. The Working Group keeps the Plan current to the extent required by operations.

11. The Outline Plan may be modified at the discretion of the working group to meet changed circumstances without the necessity of formal amendment. If the working group or any member thereof believes that a proposed change is of such substance as to require formal recognition, the group submits its proposal to the Executive Officer for distribution to the Board Assistants. It is only scheduled for discussion on the initiative of the Executive Officer or one of the Assistants. If no further change is proposed within the usual Board Assistants' staffing period (minimum of six working days), the Executive Officer forwards it for incorporation in the Plan by all holders.

Format

12. Each Outline Plan begins with a standard insert page explaining the purpose of the plan and procedures for handling it (see model on page 10). The body of the plan is prepared in accordance with the "Format and Content of an Outline Plan" on page 7. In the listing of the OCB Courses of Action, the paragraphs should be numbered consecutively.

Presentation to the Board

13. When an Outline Plan is considered by the Board the appropriate Assistant Secretary of State or Deputy or other senior operating officer of a member agency gives a background briefing with respect to the situation in the general area covered by the Outline Plan and the U.S. policies applicable thereto.

Downgrading an Outline Plan

14. The full text of an Outline Plan as approved by the Board and distributed by the Department of State to the appropriate chief or chiefs of mission contains the text of NSC courses of action and usually carries a "Top Secret" classification. To facilitate the handling of

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preparatory drafts and to permit wider distribution by the operating agencies of an approved Outline Plan to operating officials in Washington and in the field, the working group is authorized to prepare an Outline Plan in which the text of the NSC courses of action is omitted. This permits the Outline Plan to carry the classification appropriate to the sensitivity of the content of the Plan itself.

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(2) For recommending review: - "NSC _____ has been reviewed from the standpoint of operating considerations and operating experience to date and of anticipated future developments. It is recommended that policy be reviewed by the National Security Council for the following reasons: _____."

c. Criteria for recommending review of policy are:

(1) Critical new problems require operating decisions which are specifically excluded, or which could be construed as being excluded, by existing policy.

(2) Proposed courses of action might involve major risks or are of such magnitude as to warrant interpretation by NSC as to whether they are in line with policy, even though the general wording of the existing policy might be sufficient to encompass the proposed course of action.

(3) OCB believes certain NSC-approved courses of action are inadequate to obtain satisfactory progress toward major U. S. objectives or to provide necessary guidance to the operating agencies.

(4) Problems of interpretation have arisen in actual operations which cannot be resolved in the OCB.

d. Policy review is not requested merely because an objective has not been fully achieved, or specific courses of action have become impracticable or to bring up to date a policy paper unless there is a clear necessity for new policy.

e. Progress reports do not suggest the language of the new policy or indicate what the policy action should be. When a review of policy is recommended the problem or situation requiring policy review is simply described, leaving to the NSC the formulation of the policy recommendation to the President.

f. The degree of urgency in the revision of policy is also noted, particularly in relation to policy guidance required for forthcoming developments. Where policy revision is not required in relation to a particular development, that is noted as well.

g. In the first progress report after the approval of the Basic National Security Policy Paper (e.g. NSC 5602/1 or successor policies), there is stated any modifications required in the policy covered by the progress report as a result of the new policy.

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2. Summary Evaluations. This paragraph contains an introductory statement that gives the Board's over-all evaluation of the operational success in accomplishing the general objectives of U.S. policy. Titled subparagraphs identifying the specific objectives and major courses of action of the policy paper while still in summary form can present the Board's over-all judgment of progress on these specific courses of action. Reasons for lack of progress are also briefly described.

3. Progress in Carrying Out Commitments for Funds, Goods or Services and Other Programs

a. The "commitments" applicable under this heading are*: (1) Those which meet the test of the definition adopted for the purpose of the "Guidance for Implementation of NSC Action 1550," dated October 5, 1956, which defines commitments as: "...any communication between a responsible United States official and a responsible foreign official which would reasonably be interpreted as being a promise that the United States will provide a foreign government with funds, goods, or services." (2) P.L. 480 agreements as a special group of commitments worthy of separate reporting; (3) Also, Export-Import Bank loans that in the opinion of the working group have an important bearing on the implementation of policy. "Other Programs" are those on which the working group wishes to comment and are not considered to be "commitments" as such.

b. This paragraph mentions briefly that the commitments or other programs are being met, or explains in some detail any important delays, interruptions, or breakdowns in government programs, stressing difficulties in meeting commitments to foreign governments.** (Refer to financial annex where necessary.)

c. The status of foreign aid and P.L. 480 programs is especially important in this section. P.L. 480 agreements, where they exist, should be clearly summarized under a distinct heading to indicate the extent of fulfillment of deliveries. A breakdown of commitments, under appropriate title, is included in the financial annex. Also include total cumulative amount of the approved military, economic and technical assistance programs for countries covered in the progress report, and the total expenditures or deliveries against such programs as of a recent date. Where possible, the amount of the current year's program should be shown separately in addition to its inclusion in the cumulative total approved program figures.

* If an Outline Plan has been completed on a project prior to the preparation of the progress report, Section I-C.2 of the Plan, entitled, "U.S. Commitments for Funds, Goods or Services," should be of assistance here.

**Emergency cases which cannot await the preparation of a regular progress report, and which require more than noting in the Weekly Activity Report, are presented to the Board and, if necessary, to the NSC, in the form of special reports.

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(1) The above information should be developed in narrative form, not as a statistical chart; and while consistent with the financial annex, it does not duplicate that annex.

(2) Insofar as is practical, the time periods covered for the three types of programs should be identical so as to provide comparable data on each program. It would be desirable to use an expenditure or delivery cut-off date which ties into data furnished in the financial annex, i.e. FY 57 column "Through Date" or "Estimated Total."

(3) The Military Assistance Program data should include approved country programs plus the additional amount representing this country's proportion of the world-wide programs for packing, crating, handling and transportation and for rehabilitation of excess stocks.

4. New Commitments for Funds, Goods or Services. In accordance with approved "Guidance for Implementation of NSC Action 1550," dated October 5, 1956, Progress Reports will include pertinent information (e.g., type, date, duration, magnitude, inter-agency aspects, etc.) with respect to any new commitments entered into during the reporting period. If there have been no new commitments during the period of the report, such a statement should be included.

5. Overseas Internal Security Programs. This paragraph summarizes progress, or lack thereof, and the major problems involved in implementation of OCB approved Overseas Internal Security Programs.

B. MAJOR OPERATING PROBLEMS OR DIFFICULTIES FACING THE UNITED STATES

6. Significant problems or areas of difficulty, from the point of view of U. S. operations, or the accomplishment of NSC objectives and courses of action are summarized for the attention of the OCB or the NSC. Separate paragraph headings should be used for each major problem. Abbreviated statements of pertinent governmental actions, in process or under consideration, which are expected to moderate or improve the situation for U.S. operations or objectives should be included where possible in connection with each problem or area of difficulty noted.

C. LISTING OF ADDITIONAL MAJOR DEVELOPMENTS DURING THE PERIOD

7. This section presents a brief list of major foreign and U. S. actions or other developments during the period which do not duplicate information included in Parts A or B but which are significant for the objectives and courses of action in the NSC paper. It is kept as brief as possible and includes only items of sufficient significance for noting by the Council and the President.

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FINANCIAL ANNEX

8. A financial annex is prepared for each country covered by the progress report. An additional page containing a "Pipeline Analysis" with respect to the Mutual Security Program will be attached to the financial annexes when the progress reports are forwarded for Board Assistants' and Board consideration. The figures for this page will be provided by Defense and ICA; and the date on this form will be the agreed date when the report is forwarded to the Board Assistants for their scheduled consideration. (See attached format for contents of the Financial Annex and the Pipeline Analysis, Mutual Security Program.)

9. All figures in the financial annexes should be as firm as it is practicable to make them. It is understood, however, that certain figures, particularly those involving projections, may involve estimates which can be made only as reliable as the assumptions underlying them. All figures over \$5 million should be rounded to the nearest million. Figures up to \$5 million should give the figure to the nearest tenth million. There should be a minimum number of footnotes. It will be assumed that all figures may contain some element of estimate, and it will not be necessary, therefore, to put in footnotes to cover this qualification.

10. In all cases working groups should check to see whether expenditures in either the current or previous fiscal year deviate significantly from the estimates in the NSC financial appendix. If significant deviations appear, this fact should be explained in the comments. Where the differences are relatively small, there need be no mention of the NSC estimates. Major changes in forces or programs made since the last policy paper should be dealt with in the text of the report.

11. No footnote reference to private participation in loans of the IBRD or Export-Import Bank is necessary unless the amounts involved are relatively large.

12. In reference to P.L. 480 agreements, the table should include all such agreements, in chronological order with the most recent first. Where agreements are under negotiation or preliminary discussion, simply use an asterisk in the date column and footnote the status of arrangements. Where arrangements have been completed, use date on which the agreement was signed.

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Economic Relations

Under Section A or B, or according to the facts, the foreign trade relations of each country covered by the progress report which are of particular interest from the standpoint of economic relations with the Sino-Soviet bloc are summarized in short narrative form in an appropriate place in the text. Elements stressed in this coverage are: significant types, directions and quantities of external trade within the period, major trends within the period, and future expectations. Breakdowns are shown for trade with the Sino-Soviet bloc and with the Free World. Any necessary figures are expressed in dollar equivalents and explained in the text; elaborate charts or tables are usually not desirable.

Status of Outline Plans of Operations

The memorandum transmitting the Progress Report to the Board will contain a paragraph commenting on the adequacy of any OCB Outline Plan of Operations under this policy, and referring to any revisions in such Plans that are being proposed for Board consideration. When possible such revisions are submitted for consideration along with the Progress Report.

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FINANCIAL ANNEX TO PROGRESS REPORT ON
 (In millions of dollars over \$5 million. Up to
 \$5 million shown in nearest tenth million.)

EXPENDITURES AND DELIVERIES - CERTAIN U. S. ACTIVITIES

| Activity | FY 1956 | FY 1957 | | FY 1958 (Est. as of) |
|---|---------|--------------|------------|-------------------------|
| | | Est. Through | Est. Total | |
| <u>Military Assistance</u> (Inc. construction & consumables (Direct Forces Support); excess stocks rehabilitation; packing, crating, handling, transportation; excess stocks supplied.) | | | | |
| <u>Economic Assistance</u> (Defense support or Development assistance.) | | | | |
| <u>Technical Assistance</u> | | | | |
| <u>Information Services</u> | | | | |
| <u>Educational Exchange</u> | | | | |
| Total | | | | |
| MAP Sales of Military Equipment & Services | | | | |
| MAP Offshore Procurement Payments (Defense expenditures entering into int'l balance of payments.) | | | | |
| Other U.S. Govt. Payments (affecting int'l bal. of payments - mil. & civ. pay, construction, procurement of U.S. mil. supplies & equipment.) | | | | |

LOANS

| LOANS BY | During Period to | | | As of | |
|------------|------------------|------------|----------------------|-------------------------|------------------|
| | Disbursements | Repayments | New Loans Authorized | Undisbursed Commitments | Outstanding Debt |
| IBRD | | | | | |
| EX-IM BANK | | | | | |

PUBLIC LAW 480 AGREEMENTS

| Date | Title | Amount | Est. % Dels. | Major Commodities | Use of Local Currency or Other Comment |
|------|-------|--------|--------------|-------------------|--|
| | | | | | |

All Notes and Comments Relating to the above figures are shown on a separate page.

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PIPELINE ANALYSIS, MUTUAL SECURITY PROGRAM
(In Millions of Dollars)

COUNTRY

Date _____

MILITARY ASSISTANCE

| | <u>Program</u> | <u>Expenditures</u> | <u>Carryover</u> (at end of period) |
|------------------|----------------|---------------------|--|
| Prior to FY 1956 | | | |
| FY 1956 | | | |
| FY 1957 | | | |
| FY 1958 | | | |

ECONOMIC ASSISTANCE

Obligations

Prior to FY 1956
 FY 1956
 FY 1957
 FY 1958

TECHNICAL ASSISTANCE

Prior to FY 1956
 FY 1956
 FY 1957
 FY 1958

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C. PROGRESS REPORTSPurpose

1. Reporting to the National Security Council on progress on the implementation of national security policies is one of the major responsibilities assigned to the Board. OCB progress reports serve the following purposes.

a. Giving the operating viewpoint as to the need for review, through the regular machinery of the Council, of the NSC policy concerned.

b. Estimating the effectiveness of the action taken, note significant successes or failures, and explain principal difficulties met.

c. Flagging problems expected to require additional planning or future actions and indicating possible solutions.

d. Providing a frank analysis of operating situations for the information of the NSC and the guidance of the agencies.

e. Listing the principal things which the government has done to put policy into action.

General Considerations

2. A typical OCB progress report means different things to the various people in the government who are concerned with it. But above all, it is an accounting to the President by the members of the Board as to how well they have been able to carry out the task he has assigned to them. Since the report is read and acted upon eventually by the heads of agencies and by the President, the members of the Board have asked that it be made as compact, readable and honest as possible. If significant differences of opinion should persist despite the best efforts of the drafting agencies to reach agreement, those differences, together with the respective positions of the various agencies, should be clearly set forth in the report, and not concealed by obscure or compromise language.

3. The same factors which make for readability and effectiveness in a document for the President also enhance its usefulness to the numerous other officers in Washington or in the field who look to it for information or consult it as a guide to action.

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Time Schedule

4. A regular progress report is required at least every six months on the projects which the President assigns to the Board. Each month the OCB staff circulates a Tentative OCB Reporting Schedule of reports and other papers scheduled for Board consideration during the following six months. The dates in this schedule are initially set in accordance with the requirements of the reporting procedures established by the NSC and with a view to coordination where feasible with the estimated completion dates of NIE's and the NSC schedule for the review of policy. The schedule is regularly revised or concurred in by the working groups. Occasional departures from this time period are permitted to take into account an NSC policy review, the timing of National Intelligence Estimates or some unusual external circumstance. Recommendations for such variations are submitted to the Executive Officer for discussion with the NSC staff. Progress reports are also required on a regular basis for Board projects of non-NSC origin.

Special Reports

5. In addition to the regular, periodic progress reports, the Board may request, or a working group may originate, various special papers for the OCB or the NSC. These special reports are used to provide information or obtain action in situations which, because of urgency or for some other reason, cannot be dealt with properly in a regular progress report. While there is no standard format for these special reports, they are transmitted for the attention of the Board by the usual covering memorandum from the Executive Officer.

Procedure for Preparation, Staffing and Consideration of Progress Reports

6. The progress report has been standardized in a format consisting of three sections concisely presented in a total of four or five pages, plus a financial annex with a pipeline analysis. (See sample for content and format.) Where possible, working groups should use the attached format but working groups are permitted to modify this format to make the report more effective or to more fully reflect operational problems for a particular area or subject. Modifications of format should be carefully analyzed to ensure that the report contains the essential elements which the Board members look for in Progress Reports.

7. With respect to the preparation of progress reports, experience has demonstrated it is desirable to begin the development of a report by securing an agreement in the working group on its over-all approach and thereafter obtaining in writing a concise statement from each operating agency represented on the working group of their work in implementation of the policy, and when available suggestions and comments from the field.

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One of the working group, often the OCB Staff Representative, is then assigned to prepare a first draft based on the agency statements plus the general guidance of the working group. This first draft will then be circulated for further comment and revision by the whole working group. Consultation by each working group member with his Board Assistant on the working group draft report before it goes to the Executive Officer is encouraged to help speed the final Board Assistants' consideration of the report. To facilitate consultation between the working group member and his Board Assistant, the "semi-final" working group draft report is sent by the Deputy Executive Officer to the Board Assistants. When the report is submitted by the Chairman of the working group to the Executive Officer, it is as up to date as possible.

8. In connection with the preparation of a semi-annual progress report to the NSC, the working group also reviews any existing related Outline Plan of Operations for possible revision, especially in light of the paragraphs in B. MAJOR PROBLEMS.... Whenever feasible, such revisions to the Outline Plan of Operations including revisions of the Overseas Internal Security Program, as appropriate, should be forwarded concurrently with the Progress Report. (See Part II, B., paragraphs 6 - 7.)

9. The Executive Officer transmits the report to the Board Assistants for their consideration at least a week before it is scheduled for an Assistants' meeting. Usually reports will be transmitted earlier so that the Board Assistants can have five full working days for staffing the paper.

10. Immediately prior to Board Assistants' consideration of the report, the OCB Staff Representative prepares a consolidated list of largely editorial revisions which have been obtained from the agencies as a result of most recent staffing. The revisions are listed in the order of the Progress Report paragraphs to which they pertain and are identified as to the agency proposing the change. The list is distributed at the Board Assistants' meeting to facilitate the consideration of such minor revisions and to permit more time for substantive discussion.

11. The working group members should be alerted to be ready on the day of the Board Assistants' consideration of the report to coordinate, if necessary, revisions suggested by the Board Assistants. The period covered by the report is extended to the date the report is considered by the Board Assistants.

12. After Board Assistants' consideration and/or revision, the Executive Officer then transmits the report to the Board for its consideration no earlier than twelve days following Assistants' meeting. The working group chairman attends the Board meeting when one of his group's progress reports is being considered. At this meeting, the Chairman gives highlights of the report and outlines anticipated problems. In addition, the appropriate

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Assistant Secretary or Deputy or other senior operating officer of a member agency may give a background briefing with respect to the situation in the general area to which the report relates.

13. Immediately after the Board concurs in the report, it is updated by the Executive Officer to the date of Board Action and transmitted to the NSC. Each report on an NSC policy is scheduled on the Planning Board and the Council agenda to provide an opportunity for discussion. When the report is scheduled for Planning Board consideration, the Executive Officer transmits an updating memorandum to the Special Assistant to the President for National Security Affairs informing him of significant operational developments and accomplishments that have occurred subsequent to Board action on the report. Items in the memorandum are checked, as appropriate, with the chairman and other working group members concerned. Copies of the memorandum are sent to the Board Assistants and to agencies not regularly represented on the Board which are especially concerned with a particular progress report, if any. If the report recommends NSC policy review, the Council considers it in conjunction with the Planning Board recommendations. After the NSC action, the report is issued as a Board document (in green covers), with a note as to the action taken by the Board and the NSC.

Sensitive Information

14. Information of an especially sensitive nature is usually discussed at the OCB Luncheon meetings and, if required, a special annex is prepared and circulated in accordance with paragraph 4 of Special Annex - SECRET - to Procedural Memorandum No. 7, dated April 28, 1954.

Security Classification

15. The progress report classification is determined by the sensitivity of the information it contains and need not necessarily be the same as that of the NSC policy paper concerned.

Background Papers

16. The working group may at its discretion develop short background papers to assist the Board Assistants in briefing the Board members on a few of the more important paragraphs included in the progress report which might need further elaboration. The Board Assistants may request additional papers at the time of its review of the reports, although the need for such papers should be coordinated with the appropriate Assistant in advance if practicable. These background papers are not part of the progress report and they are not included in the draft prepared for Board consideration unless the Board Assistants so direct.

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D. WEEKLY ACTIVITY REPORTSample

(CLASSIFICATION)

OPERATIONS COORDINATING BOARD
Washington 25, D. C.

(Date)

WEEKLY ACTIVITY REPORT

This weekly report is a status summary of matters under discussion or coordination in the Board, Board Assistants and OCB working groups or committees. Items included under "OCB Committees and Working Groups" are matters which have been considered, formally or informally (by telephone or otherwise) by the members of one of the OCB committees or working groups. In addition, the report covers the follow-up on special matters discussed at Board meetings and developments in connection with approved OCB papers.

A. THE BOARD

1. Tentative Agenda (for the 2 meetings beyond the current meeting)
2. Assignments Being Coordinated at the Board Level
 - a. NSC Action No. 1550 - (Subcommittee of OCB - State, Defense, President's Representative - working on draft procedure.)

B. THE BOARD ASSISTANTS

1. Tentative Agenda for Meeting of (the next meeting)
2. Other Matters
 - a. At special July 9 meeting, Assistants
 - (1) Agreed on timing and method for revision of Outline Plans of Operations;
 - (2) Agreed to the elimination of the "Detailed Development of Major Actions" and the substitution of elaborating background statements where necessary;
 - (3) Agreed to revisions in the form and content of the Weekly Activity Report in line with the Board's discussion at the July 3 meeting.

C. OCB COMMITTEES AND WORKING GROUPSFAR EAST

1. Southeast Asia (NSC _____)
 - a. Burmese Medical Training - IES is drafting etc.

(CLASSIFICATION)

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D. WEEKLY ACTIVITY REPORTObjectives and Criteria

1. The Weekly Activity Report is a weekly report on the status of matters under discussion or coordination in the Board, Board Assistants and OCB working groups or committees. Items included under "OCB Committees and Working Groups" are matters which have been considered, formally or informally (by telephone or otherwise) by the members of one of the OCB committees or working groups. In addition, the report covers the follow-up on special matters discussed at Board meetings and developments in connection with approved OCB papers. It is a regular feature of each OCB agenda. It is the Executive Officer's principal vehicle for reporting to the members on the current status of Board business, with emphasis on items which are not otherwise carried on the Board's agenda for that day.

2. While its primary purpose is to serve the OCB members, the report has an important related mission of cross-reporting to those participants in OCB operations on related subjects in different geographic areas.

3. The report is organized into three major parts, containing activity reports of the Board, the Board Assistants and the OCB Committees and Working Groups, respectively. The part on committees and working groups is arranged according to major geographic areas, plus a "general" section covering working group assignments of a "functional" nature.

4. The report stresses action rather than information, and seeks to show how the reported actions directly relate to the execution of NSC or other pertinent policies.

5. The Executive Officer's criteria for compilation of the report emphasize brevity, timeliness and the real need to inform the Board members. Some flexibility is allowed in the selection and presentation of contributions, but in general the report contains only those items sufficiently important to the interests and responsibilities of the Board members to deserve their attention as a group.

6. Contributors use the following questions as guides:

a. Is the action a specific and important one taken under an NSC paper, Outline Plan of Operations, or Board assigned project?

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- b. Is it an action in disagreement?
- c. Is it an action on which there has been undue delay or inactivity on the part of the responsible agencies?
- d. Is it a significant item which has not been generally made known to the Board? For example, an agreed-upon action not yet taken or publicly announced.
- e. Is it an action which is important because it is in response to a Board action or a request of a member of the Board?

7. The following instructions are observed in drafting items for the report:

- a. Each entry, where possible, has a clear and appropriate but brief side-heading.
- b. Text begins with an indication of what a specified agency or working group accomplished or implemented in the OCB coordination process; e.g., ICA-State sent, USIA agreed, working group recommended, Defense directed, etc.
- c. Cable material from overseas missions is used only in entries after action items and as additional information explaining coordinated action.
- d. Intelligence information is included only in entries where it is necessary to explain or expand a previously mentioned action. No action, no intelligence.

An example to illustrate the above:

"Re NSC objective (Balkanize the Empire of Mu), State-ICA-Defense are preparing paper for OCB consideration on basis of Embassy Heliopolis report that Mu is vulnerable to charge in UN that Mu is committing genocide against the Lilliputian minority".

- e. Working group recommendations regarding changes in scheduled dates for progress reports, outline plans of operations or such papers will be noted when the change should be noted by the Board members or the Board Assistants.

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8. The report is not meant to be a means for obtaining Board action on emergency problems which do not permit the usual advance documentation and staffing. When such action is unavoidable, however, the Executive Officer gives the maximum possible advance notification to the agencies.

9. In addition to the brief weekly highlight statement under each project, a more comprehensive special report is occasionally appended to the report in response to some particular interest of the Board.

Sample

10. See sample on Page 24 for format and content of the report.

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E. AGENDA PLANNING AND DOCUMENT CONTROL

1. In order that documents submitted for action by the Board Assistants or the Board may receive orderly and thorough staffing by the Departments and Agencies, criteria have been established regarding the time allowance for distributing documents prior to their consideration at meetings.
2. Agenda planning for Board and Board Assistants' meetings is aided by a "Tentative OCB Reporting Schedule", issued monthly, listing for approximately a six-month period the dates for considering regular recurring items, such as Outline Plans of Operations and Progress Reports, and other special papers requested by the Board.
3. In addition to this monthly publication, there is issued each week an "OCB Tentative Agenda" which presents a more up-to-date five-week schedule for items to be discussed at Board and Board Assistants' meetings. New items are scheduled with an eye toward maintaining a reasonably even workload and ensuring that the most important items receive priority.
4. Whenever an OCB Working Group or member agency plans to submit a document for Assistants or Board consideration which is not listed on the Tentative OCB Reporting Schedule, the OCB Secretariat Staff should be notified as early as possible of the expected date for submission to the Executive Officer, to permit as much advance scheduling as possible.
5. When the Executive Officer or one of the member agencies plans to raise an unscheduled item as emergency business at a Board Assistants' or Board meeting, the Board Assistants are notified as early as possible before the meeting.
6. All documents to be considered by the Board Assistants or the Board must be submitted to the Executive Officer for transmittal. The Executive Officer transmits the document by a memorandum containing the pertinent information (See "Content of Transmittal Memoranda", Page 6, A. 17)
 - (a) the date it is to be considered, (b) resume of the background and status of the project, (c) action recommended, (d) who prepared the document, (e) action taken on the document by the Board Assistants (on papers going to the Board), and (f) disposition of previous drafts, if any.
7. Routine documents, the substantive contents of which do not require complete staffing by the Departments and Agencies, are acted upon by the use of a clearance form transmitted with the document. An example of this type of document is the standard terms of reference for a working group. This method is also sometimes used for obtaining final concurrence in revisions of substantive papers which have been thoroughly staffed or previously discussed in a meeting.

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8. After action on a document by the Assistants or the Board, there is made an appropriate distribution of the final document with a suitable transmittal memorandum indicating the nature of the final action and the purpose to be served by the document. Such documents are usually distributed within a week after final action takes place. Progress Reports to NSC, Outline Plans of Operations and similar documents concurred in by the OCB will be distributed under a green cover.

9. The following table shows timing requirements for scheduling and distribution of various OCB documents for Board Assistants' and Board meetings, and issuance dates for other documents:

BOARD ASSISTANTS

| | |
|-------------------|--------------------------------|
| Agenda Item | Delivered one week in advance. |
| Agenda | Delivered by Thursday noon. |
| Meeting | Friday, 9:30 a.m. |
| Record of Actions | Delivered by c.o.b. Tuesday |

BOARD

| | |
|-------------------------|--|
| Agenda Item | Delivered eight days in advance. |
| Agenda | Delivered by c.o.b. Monday. |
| Activity Report | Delivered by 9:45 a.m. Tuesday |
| Meeting | Wednesday 2:00 p.m. (Luncheon 12:30) |
| Minutes - First Draft | Distributed at Friday Board Assistants' Meeting. |
| Second Draft | Delivered by c.o.b. Monday |
| Approved (if necessary) | Delivered by c.o.b. Thursday thereafter |

GENERAL

| | |
|----------------------------|--|
| Annual Status Report | Submitted annually to NSC by August 15. |
| Progress Reports | Submitted semi-annually for each project. |
| Outline Plan of Operations | Prepared as soon as feasible after assignment of new NSC country policy or upon request. |

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GENERAL (Continued)

| | |
|----------------------------------|--|
| Tentative OCB Reporting Schedule | Lists all known scheduled agenda items; issued monthly. |
| Projects List | Lists information regarding each project; issued periodically. |
| Tentative Agenda | Delivered by c.o.b. each Tuesday. |
| Clearance-Slip Action | Clearing documents not requiring a meeting. Ten days allowed. |

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F. INFORMATION BRIEFSDefinition

1. Information briefs are unclassified papers adapted from existing intelligence research material and designed to influence the climate of opinion abroad. Policy guidance for the briefs is secured from the NSC and the State Department. Although they are based on the great body of existing research materials, they do not themselves involve basic research.

Background

2. The importance of exploiting "targets of opportunity" was emphasized in the report of the President's Committee on International Information Activities, dated 30 June 1953. Information briefs make a major contribution to such exploitation. The OCB recognized the importance and need for such briefs in a memorandum of 30 September 1954 on their preparation.

3. The information brief is one of the means at the disposal of the OCB working groups to assist in the discharge of their responsibility for "the execution of each security action or project so that it shall make its full contribution to the attainment of national security objectives and to the particular climate of opinion the United States is seeking to achieve in the world." (From EO #10483)

Procedure

4. There is no single method for the preparation of briefs. The most common method is to reorient and merge existing intelligence studies, using the facts they present, supplemented by additional material as it is needed.

5. The Executive Officer is responsible for the preparation of information briefs. His decision as to their development and use will be taken after consultation with the chairman of the working group concerned, the Special Assistant to the President, or the Board or Board Assistants.

6. Requests for the preparation of information briefs will normally be submitted by OCB member agencies through the Board Assistants, working group members or OCB staff members. Requests should be transmitted through the Executive Officer, OCB, who will in turn submit them to the chairman of the appropriate OCB working group. A memorandum of agreement covering the preparation of each information brief will be recorded by the Executive Officer or the Chief of the Special Projects Staff acting for the Executive Officer, with copies to the pertinent working group chairman and the appropriate OCB member agencies' intelligence offices.

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7. The working group will prepare briefs from intelligence materials supplied by member agencies and made available to the working group by those agencies. The briefs must be coordinated by the working group with the agency or agencies whose source material is employed. The working group will obtain declassification of the information brief from each agency whose material is used in the preparation of that brief.

8. The status and use of information briefs will be indicated in the weekly OCB Activity Report. Completed briefs will then be sent to the chairman of the working group concerned and to the individual making the request. Copies will also be sent for information to contributing agencies. Additional distribution will be agreed upon between the chairman of the working group and the Executive Officer, by the Board Assistants or by the Board.

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