

June 1985

STUDY OF OL's SERVICE ENVIRONMENT AND WAYS TO ENHANCE OL's IMAGE

The Director of Logistics has asked IMSS to undertake a directorate-level objective to enhance OL's image as a service organization. The following questions serve as a point of departure to help us determine how OL can improve its services/support....or better acquaint other components with our role in the Agency. Feel free to tailor the questions to your component or expand them as you think best contributes to this effort. Please add continuation sheets as needed.

1. In your component, what activities/products/services act as "image creators" for you and OL?
 - a. Response time in meeting "due-in dates" on requisitions.
 - b. Telephone manners - helpful attitude - direct responses to questions - avoid passing buck to other components unless you are sure who indeed has action.
 - c. Help in identifying sources or alternate sources when requirements offices do not know where to go.
 - d. PD's role as "enforcers" in many areas— FOICA policies, security policy , competition policy, the ADP&E approval chain, etc.
 - e. Responsiveness to requests for status reports or follow-up action on pending requests.
 - f.
 - g.
 - h.
 - i.
 - j.

*This is a totally
"mechanical" response
to the problem!*

~~SECRET (when filled in)~~

25X1

STAT

SECRET (when filled in)

QUESTIONS FOR OL DIVISIONS/STAFFS (page 2)

2. What do you think are your customers' perceptions of your component's services and image in each of the above areas? Key your answer to the appropriate letter in Question 1.
 - a. See responses to question 13 on recent survey (attached). We were rated good or excellent by 81 to 83% of respondees.
 - b. We were given excellent marks from 33% of our customers; good marks from 44%, and below average marks from 23%.
 - c. Good or excellent from 63% of our customers, fair: 24%; poor: 8%.
 - d. A few understand and appreciate our enforcers role but I am sure that the majority blame us for being bureaucratic bottlenecks & purists.
 - e. It appears that about 25% think we should do better in responding to status requests.
 - f.
 - g.

3. In which areas could your component project a better image or provide a better service? How? (Key your answer to the appropriate letter in Question 1.)
 - a. Keep pressure on vendors by calling them within 14 days or less of a missed delivery schedule. Advise requirements offices when we know their need date is unrealistic and simply cannot be met.
 - b. Provide formal training in telephone manners and urge all employees to be courteous and helpful no matter how ridiculous the request. Insure that calls requesting assistance are returned ASAP or no later than COB of the same day message is received.
 - c. Think we are doing well in this area, but turnover hurts progress. We need more stability among our professional and clericals if we are to make significant progress here.
 - d. Little or nothing can be done on this one. Few people like "cops" to tell them they did something wrong or are not in compliance with established policy. The problem here is that PD gets the blame because people up front in Procurement process are ignorant of policy, and don't like being called up short on it when it means more work on their part.
 - f.
 - g.

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QUESTIONS FOR OL DIVISIONS/STAFFS (page 3)

4. What additional services/support could your component add to improve customer relations and enhance OL's image? Please indicate priority

Achievable with present resources

- a. Although we have been authorized positions to staff a new Contract Admin and Settlement Branch (CA&SB), we are in the process of recruiting to fill those slots. Presently we have 3 full time staffers and one part timer. We are confident that progress is being made to improve vendor delivery. Our customers will be seeing significant improvements in this area in the near future.
- b. We intend to extend D/OL's office visitation program to our Buyers in GPB and our contract officers in other branches. Each officer will visit one of his major requirements offices on a bi-weekly basis.
- c. Within the next three months, all officers will have their own Wang work station and be trained to access the data base which will enhance our ability to respond to customers inquiring on the status of their requisitions.
- f.
- g.

Achievable with additional resources (specify resources)

a.

See Para 5 below

b.

c.

d.

e.

f.

g.

SECRET (when filled in)

3

SECRET (when filled in)

QUESTIONS FOR OL DIVISIONS/STAFFS (page 4)

5. What other factors do you think influence OL's image? How can they be changed to enhance OL's image?

It seems that OL and in many cases specifically PD, is a fall guy and "goat" that always gets the blame when things do not happen fast enough in delivering material and services requested by the operating components. PD is cast in the role of "enforcer" for a variety of internal and external procedural and policy issues that inhibit fast action in the acquisition process.

Starting with Federal Law and regulations governing our activities (which for the most part are complete enigmas to our customers) down to Agency policies which in many areas are ill-defined and lacking clear cut procedural guidelines, procurement personnel are the ones that must say no, maybe, or require additional work on the part of our customer before we can do our job. Specific areas that are particularly troublesome for PD are:

- 25X1
- a. Competition in contracting - Sole source justification.
 - b. F.O. ~~DATA~~ C.I.
 - c. Security procedures and requirements for procurement.
 - d. convoluted and complex approval and coordinating procedures on ADP procurement.
 - e. Ill-trained and inexperienced personnel preparing and documenting requirements, i.e., Statement of Work, Sole Source Justification, etc. They simply do not provide us with the information needed to start action on procurements.

(Second part of #5 continued below)

- ~~b. How can we best communicate to others in the Agency the scope and importance of our services?~~

- a. HOW CAN THIS BE CHANGED?

- Agency managers - (DD's and Office Heads) must be made more knowledgeable of the acquisition process. Get them all to read, understand and appreciate Agency and Federal Policy and procedures on procurement. This is hard to do because our Handbook on Acquisition Process is out of date and we have been trying in vain for the past two years to get it published. Until we have a publication that is meaningful and up to date, there is nothing that can be done! Once we have one, it would take a miracle or Act of God to expect our senior managers to read and understand it -- let alone abide by it if it doesn't suit their purposes. Hence, we are in a Catch-22 situation and I see ~~nothing~~ of improving our "image" in this area.

- b. LITTLE PROSPECTS FOR

- c.

See attached

SECRET (when filled in)

4

In spite of the pessimistic tone above, there may be a few areas where action can be taken; these are:

a. Get on with issuing the long delayed Acquisition Handbook and make it required reading for our Logs officers, admin officers, and COTR's in the operating components. We must elicit their support and understanding in complying with the policy and procedural aspects of the procurement cycle! Hence, some of the "heat" would be transferred to these personnel and not all of the blame placed on OL or OL/PD!

b. Increase staffing of PMS so this unit has resources to clean up the books, i.e., consolidate and re-do our Procurement Notes, spend more time in rationalizing and explaining Agency and Federal policy and procedures to our customers!

c. Obtain a commitment from top management (i.e., DCI, DDCI, and the DD's) that they are willing to devote resources to a formalized acquisition planning program.

SECRET (when filled in)

QUESTIONS FOR OL DIVISIONS/STAFFS (page 5)

7. What public relations tools could you suggest to enhance OL's image (e.g., employee bulletins, posters, brochures, video presentations, briefings)?

a.

NOTHING OTHER THAN MENTIONED

b.

PARA 4 ABOVE.

c.

d.

e.

f.

g.

8. If we were to conduct a voluntary random survey of the perceptions of OL within the Agency, who would you recommend be queried and with what specific questions?

a.

THIS ~~WAS~~ HAS BEEN DONE

b.

WITHIN PAST 18 MONTHS

c.

SEE ATTACHED

d.

e.

f.

g.

SECRET (when filled in)

5

SECRET (when filled in)

QUESTIONS FOR OL DIVISIONS/STAFFS (page 6)

9. Has your component conducted a customer survey within the past two years? Yes If "yes," please make copies of the survey and results available to IMSS. (Elaborate, if desired, on any changes made as a result of the survey or any changes suggested but not implemented.)

COPY OF LATEST SURVUS
ATTACHED!

10. What other suggestions do you have for enhancing OL's image that are not specifically addressed in these questions?

a.

NONE OTHER THAN

b.

MENTIONED ABOVE

c.

d.

e.

f.

g.

SECRET (when filled in)

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02 NOV 1984

MEMORANDUM FOR: Director of Logistics

FROM:

[Redacted]

Chief, Procurement Division, OL

SUBJECT:

Final Report on Procurement Division, FY-84
Management Objective on Customer Survey

1. Attached is the final wrap up on responses to our "Customer Survey". We sent out [Redacted] questionnaires to component Administrative Officers, Logistics Officers and Contract Officer Technical Representatives (COTRs) and only [Redacted] responded. We were a bit disappointed that only [Redacted] of our customers replied.

2. There were no big surprises! The overall impression of Procurement Division support (see Question 14) was favorable with marks of good to excellent of at least 65% in every category and as high as 94% in the "courtesy" category.

3. The only areas identified for further action are:

- a. 19 individuals requested copies of the Acquisition Handbook. (These will be sent when new revision is published.)
- b. 24 individuals asked to be considered for our Acquisition Management Course. (We will identify these individuals to Procurement Management Staff to see when they can be worked into the course.)
- c. 7 respondees asked that imprest funds be established in their units. (We will follow up with unit Budget and Finance offices to see if this can be done.)

[Redacted]

Attachment:
As stated

OL 12158-84

SUMMARY RESULTS OF PROCUREMENT DIVISION CUSTOMER QUESTIONNAIRE

GENERAL:

Questionnaire sent to [] individuals, primarily admin officers and logistics officers in all components in the Agency.

a. We received [] responses from the 83 questionnaires mailed out - for a response rate of []

b. Of those responding:

[] spend less than 10% of their time on procurement matters
[] spend between 10 and 25% of their time on procurement matters
[] spend more than 25% of their time on procurement matters
[] failed to respond to this question.

QUESTION 1. A key factor in PD's ability to take prompt and effective action on your requests is the receipt of clear and detailed nomenclature, complete stock numbers, descriptions, specifications, statements of work, cognizant office approval (or special coordination with medics or security), and where applicable, carefully prepared and properly justified sole source documentation.

How often are you advised by PD or SD personnel that your requests need additional information before procurement action can be started?

Never - 3 or 6%
Seldom - 28 or 56%
Sometimes - 12 or 24%
Frequently - 0 or 0%
Always - 0 or 0%
No response 7 or 14%

QUESTION 2. In those instances when you have been advised that additional data is required before procurement action can be initiated, what data was lacking on your original request?

Responses to this question were somewhat inconclusive. Not all respondents responded to all sub-parts of the question.

a. 12 respondents said they frequently were advised that additional data was required: 4 for sole source justification, 4 because vendor not cleared [] and 3 because of insufficient nomenclature or stock number.

STAT b. Of those respondees who acknowledged they were "rarely" advised that additional data was required: 27 due to insufficient nomenclature, 27 due to sole source, 20 due to [redacted] 18 due to technical specifications, and 16 due to lack of approval by cognizant office.

QUESTION 3. Do you prepare or assist in the preparation of Request for Procurement Services (Form 2420)?

STAT 33 responded yes and 11 no.

QUESTION 4. [redacted] "Acquisition Handbook" is intended for use as a guide for all Agency personnel involved in the acquisition/procurement process.

Are you familiar with the substance of the handbook as it applies to requirements offices? 34-yes and 14-no

Do you have a copy of this handbook readily available? 28-yes and 14-no.

Would you like a copy sent to you? 22-yes and 19-no.

QUESTION 5. Office of Training and Education (OTE) in conjunction with OL Procurement Management Staff (OL/PMS) regularly conducts a 5 day course on the Agency's procurement process entitled "Acquisition Management for CIA Technical Personnel."

Have you attended this course? 4-yes and 43-no.

Would you be interested in attending this course? 24-yes and 20-no.

QUESTION 6. Areas that create significant delays in prompt initiation of procurement action are often up front in the acquisition cycle in that the requesting office does not provide clear and complete documentation when they forward their requests to PD. Listed below are selected key elements that must accompany your request. Please indicate which elements you find troublesome:

a. Only four respondees found any of the key elements in the "Very Difficult" category: two cited technical specifications and two cited contract data classification guide

b. Respondees who found the key elements "Somewhat Difficult" were as follows: 6 cited statement of work, 17 cited technical specifications, 23 cited sole source justifications and 6 cited contract data classification guide.

QUESTION 7a. Were you aware that imprest funds could be used for small cost procurements in lieu of submitting requisitions? 45-yes and 1-no.

b. Does your component or a sub-element thereof, have an imprest fund? 37-yes, 6-no and 3-don't know.

c. If b above is yes, how often do you use the imprest fund for procurement actions under \$300? 1-never, 6-rarely, 24-frequently, and 8 - 50% or more of the time.

d. Do you think the dollar limitation of \$300 per transaction should be higher? 30-yes and 9-no.

e. If b above is no, would you like to have an imprest fund established in your component for your use? 7-yes, 2-no, and 1-undecided.

QUESTION 8. Do you have regular and/or continuing contact with contract officers in Procurement Division? 27-yes and 16-no.

QUESTION 9. Are you aware that your inquiries for status on items requested on Form 88 should be directed to Supply Division, SMB? 46-yes and 0-no.

QUESTION 10. Are you aware that inquiries on status on items requested on Form 2420 should be directed to PD? 27-yes and 1-no.

QUESTION 11. Do you have any problems in checking status of your requests with Procurement or Supply Division/SMB? 12-yes and 31-no.

Comments of the 12 respondees claiming problems in checking status of their requests are attached.

QUESTION 12. Do you feel that you are given prompt and courteous service when telephoning inquiries and/or problems to Procurement Division? 43 responses:

Always	14	or	33%
Frequently	19	or	44%
Sometimes	8	or	19%
Seldom	1	or	02%
Never	1	or	02%

QUESTION 13. How would you rate the Procurement Division's responsiveness in terms of:

- a. Processing priority requests to support your urgent requirements. Poor-1, Fair-6, Good-29 and Excellent-7
- b. Routine requirements.
Poor-3, Fair-5, Good-32 and Excellent-3
- c. Follow-up requests.
Poor-3, Fair-14, Good-22 and Excellent-3

QUESTION 14. What is your impression of PD support in terms of:

- a. Responsiveness (timeliness)
Poor-4, Fair-13, Good-27 and Excellent-3
- b. Professional Assistance
Poor-1, Fair-9, Good-28 and Excellent-9
- c. Initiative/Voluntary helpfulness
Poor-4, Fair-14, Good-24 and Excellent-6
- d. Courtesy
Poor-1, Fair-2, Good-32 and Excellent-12
- e. Concern for Customer's needs
Poor-3, Fair-14, Good-24 and Excellent-6

QUESTION 15. Does your office or division have a focal point officer or special staff responsible for developing an annual overall procurement plan to identify and prioritize major (i.e., above \$50,000 per action) acquisitions for the upcoming year or years?

21-yes, 17-No, and 6-Don't know

RESPONSE TO PROCUREMENT DIVISION QUESTIONNAIRE #11

11. Do you have any problems in checking status of your requests with Procurement or Supply Division/SMB?

It is very hard at times to get a call returned from PD.

SMB advises difficult time in getting answers from PD.

Sometimes it takes awhile to receive an answer on a request for status.

I presently have several requests which I cannot seem to get resolved in PD. Seems to be little or no concern as to our requirements.

At times it is difficult to understand who in PD has the action, especially with 2420's. Would recommend a number be assigned to the 2420 and a copy returned by PD to log office. This would serve as a means of tracing the request.

Do not always get status as soon as needed in order to answer field requests.

Very difficult to get a response to a question in what I consider a reasonable time-frame.

Difficulty in locating a procurement action due to uncertainty, as one of three teams may have action. To verify which actions have been inputted into the OL/B&F computer requires a personal visit to Bldg. and a manual paper by paper comparison. Requests for copies of signed contracts sometimes go unanswered.

Procurement officer names, each one's responsibility and telephone nos. should be published on a regular basis for logistics officers. Also the focal point for 2420 follow-up should be published in order for the log officer to determine who was given action on a particular 2420.

They pay no attention to due dates. On at least two recent occasions delivery was not expected until 6 months after due date - very poor response time.

When following up on requests not on contract, expeditors are told the contract officer is waiting for a quotation/call back from the vendor. However, the CO does not get back to the expeditor with contract/delivery information, although a response has been requested by the expeditor.

Procurement officers frequently do not return phone calls.