


OL Files
OTM

ROUTING AND RECORD SHEET

SUBJECT: (Optional)
OL Planning Calendar and Guide for FY 1988
and Tasking for Fall OL Planning Conference

FROM: [Redacted] Director of Logistics	EXTENSION	NO. OL 4122 87	
		DATE 27 August 1987	

TO: (Officer designation, room number, and building)	DATE		OFFICER'S INITIALS	COMMENTS (Number each comment to show from whom to whom. Draw a line across column after each comment.)
	RECEIVED	FORWARDED		

1.	C/NBPO/OL 1J45 Hqs			
25X1	2. C/IMSS/OL [Redacted]			
25X1	3. C/P&TS/OL [Redacted]			
25X1	4. C/PMS/OL [Redacted]			
25X1	5. C/SS/OL [Redacted]			
25X1	6. C/B&FB [Redacted]			
	7. C/FMD/OL 3E14 Hqs			
	8. C/P&PD/OL 158 P&P Bldg			
25X1	9. C/PD/OL [Redacted]			
25X1	10. C/RECD/OL [Redacted]			
25X1	11. C/SD/OL [Redacted]			
25X1	12. [Redacted]			
	13.			
	14.			
	15.			

Attached are the tasking memorandum for the Fall OL Planning Conference on 21 and 22 October 1987 at the Sheraton-Fredericksburg, the OL Planning Calendar for FY 88, the OL Planning Guide for FY 88, the OL Five-Year Plan for FY 1987-91, the D/L Action Plan for FY 1986-88, and the D/L 30 March 1987 status paper.

Please keep these important planning papers together and note the dates shown on the OL Planning Calendar for future reference. These papers give an overview of the FY-88 planning cycle.

27 AUG 1987

MEMORANDUM FOR: Chief, New Building Project Office, OL
Chief, Information & Management Support Staff, OL
Chief, Personnel and Training Staff, OL
Chief, Procurement Management Staff, OL
Chief, Security Staff, OL
Chief, Budget and Fiscal Branch, OL
Chief, Facilities Management Division, OL
Chief, Printing & Photography Division, OL
Chief, Procurement Division, OL
Chief, Real Estate & Construction Division, OL
Chief, Supply Division, OL

25X1

FROM:

[Redacted]

Director of Logistics

SUBJECT:

OL Planning Calendar and Guide for FY 1988
and Tasking for Fall OL Planning Conference

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[Redacted]

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1. This year we broke scores of records in [Redacted] procurement actions, [Redacted] construction, renovations, and graphics, while supporting [Redacted] providing Flying Squad support, and giving special support [Redacted] As we enter FY 88, the need for advance planning will be more critical than ever. [Redacted]

25X1

2. Attached are a new OL Planning Calendar and a new OL Planning Guide to steer our planning efforts throughout FY 88. Also attached, to guide your thinking is our 1987-1991 OL Five-Year Plan and the 1986-1988 D/L Action Plan and its update of 30 March 1987. The heaviest part of the planning cycle is fast approaching and roughly covers the period from October through December. During that period, the OL components will propose and develop their FY-90 additional and FY-91 new initiatives, FY-88 objectives, FY-88 projects, and FY-88 studies, which will be discussed at the Fall OL Planning Conference to be held at the Sheraton on 21 and 22 October in Fredericksburg. [Redacted]

3. In developing ideas for your initiatives, objectives, projects, and studies, consider the following:

a. Address your planning from an OL global point of view. Be mindful of how your plans interact with other OL components and the Agency. Parochialism is out.

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[Redacted]

OL 4122 87



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b. Consider the impact on OL and your component of the following in your planning:

(1) The emergence of the Commercial Logistics Applications System (CLAS) in FY 88 and its impact on data input, reporting, and skills needed.

(2) MPA/PRA streamlining by FY 89.

(3) Reorganization of Procurement and proposed reorganization of OL.

25X1 (4) Scheduled moves to NHB

25X1 (5)

(6) The proposed emergence of new pay and compensation systems and their impact on panel systems, PARs, incentives, etc.

25X1 (7) The changing nature

(8) The impact of terrorism.

(9) The impact of increased contracting for services.

25X1 (10) Other issues that may impact on planning and our modus operandi.

25X1 4. In general, the planning process will be similar to that followed last year. However, this year I will expect proposed projects and studies, in addition to initiatives and objectives. Also, because quality personnel management is our most important goal and because we are committed to making OL's Career Service the best in the Agency, I will expect one or two objectives from each component that deal with personnel items for FY 88. Additionally, I will expect recommendations on how you will handle any unfinished initiatives, objectives, projects, and studies from FY 87.

5. Please follow the attached OL Planning Calendar for FY 88 to ensure that due dates are adhered to. The first item on the agenda is the submission of the initiatives, objectives, projects, and studies to IMSS by 5 October 1987. For a detailed

25X1 SUBJECT: OL Planning Calendar and Guide for FY 1988
and Tasking for Fall OL Planning Conference

25X1 explanation of the definitions of these terms and how to submit
25X1 these items, formats, milestone chart instructions, etc., see
25X1 the attached Planning Guide. The Information & Management
Support Staff will hold a meeting on 14 September at 10:00 in
the Supply Division Conference Room in 3G06 Page Building for
all OL Division and Staff Planning Officers to cover planning
requirements, formats, how to prepare milestone charts, etc.,
and to answer any questions. Please call

25X1 to identify your component Planning
25X1 Officer and please send that officer or designee to ensure that
25X1 the planning process will go smoothly this year. For
assistance, call Bob or Marie.

Attachments:

- A - Planning Calendar
- B - Planning Guide
- C - Five-Year Plan
- D - D/L Action Plan
- E - 30 Mar 87 Status Report on the D/L Action Plan

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SUBJECT: OL Planning Calendar and Guide for FY 1988
and Tasking for Fall OL Planning Conference

Distribution:

Orig - Each Addressee, w/atts

1 - D/L, w/atts

1 - DD/L, w/atts

1 - EO/OL, w/atts

1 - AEO/OL, w/atts

1 - OL Files, w/atts A & B

1 - IMSS Official, w/atts

8 - IMSS, w/atts

1 - IMSS Chrono, w/o atts

25X1

OL/IMSS/RB:dr/ (25Aug87)

25X1

OL/IMSS/RB:dr/mcb/ (27Aug87)

A - PLANNING
CALENDAR

OL PLANNING CALENDAR - Remainder of FY 87

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- 14 Sep 87 - IMSS planning briefing for all OL planning officers in the Supply Division Conference Room at 10:00 AM.
- *15 Sep 87 - Proposed topics and speakers for 4th Qtr FY 87 OL Quarterly.
- *21 Sep 87 - FY 90 R&D requirements - for submission (via the DDA) to DS&T. (This is a tentative date.)
- *30 Sep 87 - Updated milestone charts, as of end of 4th Qtr, for each FY 87 Directorate- and Office-level objective.

*Date items are due in IMSS.

OL PLANNING CALENDAR - FY 88

- * 5 Oct 87 - (1) Proposed additional budget initiatives for FY 90 and new budget initiatives for FY 91 - for discussion at OL Planning Conference, 21-22 Oct. Additional and new initiatives will be reviewed/modified during November and December at the directorate level and then submitted to the Comptroller in January.
- (2) Proposed Directorate- and Office-level objectives for FY 88, along with projects for FY 88 and studies for FY 88, for discussion at OL Planning Conference, 21-22 Oct.
- * 9 Oct 87 - Report of FY 87 significant accomplishments (including statistical comparisons with FY 86) - to be used in the overview at the OL Quarterly.
- 21/22 Oct 87 OL Planning Conference, Sheraton-Fredericksburg.
- *30 Oct 87 - Revised list of proposed initiatives, objectives, projects, and studies for FY 88 due to IMSS from div/staff chiefs.
- *13 Nov 87 - Updates to the OL Five-Year Plan for FY 87-91 (for preparation of the OL Five-Year Plan, FY 88-92), including:
 - (1) Milestone charts for each new FY 88 objective:
 - Designated as Directorate- or Office-level.
 - Ranked (per D/L's Action Plan 1986/1988 or updated plan) Group A (Critical), Group B (Essential), or Group C (Important).
 - (2) List of projects and studies for FY 88.
 - (3) Lists of additional budget initiatives for FY/90 and new budget initiatives for FY 91.
 - (4) Updates to the narrative portions (Introduction, Assumptions, Goals, Resource Implications, and OL's projections for the future).

*Date items are due in IMSS.

FY 88 OL Planning Calendar (cont'd)

___ Nov 87 - 4th Qtr FY 87 OL Quarterly - Headquarters.

___ Nov 87 - 4th Qtr FY 87 OL Quarterly -

*15 Dec 87 - Input for DCI's Annual Report to Congress (usually due in the DDA's office by the end of December).
(This is a tentative date.)

*15 Dec 87 - Suggested topics and speakers for 1st Qtr FY 88 OL Quarterly.

*30 Dec 87 - Updated milestone charts, as of end of 1st Qtr, FY 88, for each Directorate- and Office-level objective.

___ Jan 88 - Submit one-page summary descriptions of proposed new initiatives to DDA for Comptroller.

*11 Jan 88 - Report of 1st-Qtr activities - to be used in update of significant activities at OL Quarterly.

Jan/Feb 88 - Comptroller review of proposed new initiatives.

___ Feb 88 - OL Executive Conference.

___ Feb 88 - 1st Qtr FY 88 OL Quarterly - Headquarters.

___ Feb 88 - 1st Qtr FY 88 OL Quarterly

___ Feb 88 - Submit updates of ongoing initiatives to DDA for Comptroller.

*15 Mar 88 - Suggested topics and speakers for 2nd Qtr FY 88 OL Quarterly.

*31 Mar 88 - Updated milestone charts, as of end of 2nd Qtr, for each Directorate- and Office-level objective.

*Date items are due in IMSS.

FY 88 OL Planning Calendar (cont'd)

*11 Apr 88 - Report of 2nd-Qtr activities - to be used in update of significant activities at OL Quarterly.

___ Apr 88 - Submit DA Standard Support Requirements initiatives to DDA for Comptroller.

*16 May 88 - Updated portions of OL Emergency Procedures.

___ May 88 - 2nd Qtr FY 88 OL Quarterly - Headquarters.

___ May 88 - 2nd Qtr FY 88 OL Quarterly

*15 Jun 88 - Suggested topics and speakers for 3rd Qtr FY 88 OL Quarterly.

*30 Jun 88 - Updated milestone charts, as of end of 3rd Qtr, for each Directorate- and Office-level objective.

*11 Jul 88 - Report of 3rd-Qtr activities - to be used in update of significant activities at OL Quarterly.

*29 Jul 88 - Updated portions of "OL Yellow Pages."

___ Aug 88 - 3rd Qtr FY 88 OL Quarterly - Headquarters.

___ Aug 88 - 3rd Qtr FY 88 OL Quarterly

*15 Sep 88 - Proposed topics and speakers for 4th Qtr FY 88 OL Quarterly.

*21 Sep 88 - FY 92 R&D requirements - for submission (via the DDA) to DS&T. (This is a tentative date.)

*30 Sep 88 - Updated milestone charts, as of end of 4th Qtr, for each FY 88 Directorate- and Office-level objective.

*Date items are due in IMSS.

B - PLANNING
GUIDE

OL PLANNING GUIDE

OL PLANNING GUIDE

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OL PLANNING CONFERENCE - FALL

1. The fall OL Planning Conference usually takes place in early October at an approved out-of-town conference site. This year, it will be held on 21 and 22 October 1987 at the Sheraton-Fredericksburg. Attendees will include the D/L, DD/L, EO/OL, AEO/OL, the C/NBPO, C/B&FB, all staff and division chiefs, and the Planning Officer/IMSS.
2. In addition to general issues that affect OL's responsiveness and efficiency, proposed "additional budget initiatives" for FY 90, "new budget initiatives" for FY 91, Directorate- and Office-level "objectives" for FY 88, "projects" for FY 88, and "studies" for FY 88 will be discussed and selections made.
3. Before the planning conference, C/IMSS will send a memorandum to the C/NBPO, C/B&FB, and staff/division chiefs requesting suggested initiatives, objectives, projects, and studies by 5 October, along with a brief summary of each item in order to facilitate the discussion process.
4. After the planning conference, the C/NBPO, C/B&FB, and staff/division chiefs are required to submit a revised list of the proposed initiatives, objectives, projects, and studies to IMSS by 30 October for review by the D/L. This revised list should reflect the revisions agreed to at the planning conference (i.e., title changes, objective tracking level changes, additions or deletions to the list, etc.). In early November, the D/L will review the revised list and IMSS will send the approved revised list to the OL components. Based on this list, the OL components will submit properly formatted milestone charts for the approved objectives to IMSS by 13 November.
5. The OL Planning Officer, the staff/division chiefs, the C/NBPO, and the C/B&FB will meet to prioritize all of the proposed OL initiatives and prepare a joint recommendation for final selection and ranking by the D/L for submission to the DDA. Following this meeting, the same group will meet with the D/L, and the prioritized list will be revised/finalized and then submitted to the DDA. Initiatives will be handled thereafter by the C/B&FB, with the assistance of the Planning Officer, IMSS. (Please see separate instructions and samples under the headings "Initiatives," "MBOs and Milestone Charts," and "Projects and Studies.")

INITIATIVES

1. Annually, the C/IMSS sends a memorandum to the C/NBPO, C/B&FB, and staff/division chiefs requesting budget initiatives for discussion at the OL Planning Conference held in the fall. This year IMSS will ask that additional budget initiatives for FY 90 and new budget initiatives for FY 91 be submitted to IMSS by 5 October for discussion at the 1987 Fall Planning Conference to be held on 21 and 22 October at the Sheraton-Fredericksburg.

2. After the conference, the division/staff chiefs are required to submit a revised list of the proposed initiatives, objectives, projects, and studies to IMSS by 30 October for review by the D/L. This revised list should reflect the revisions agreed to at the planning conference (i.e., title changes, objective tracking level changes, additions or deletions to the list, etc.). In early November, the D/L will review the revised list. IMSS will send the list of proposed initiatives to division/staff chiefs, who are then responsible for preparing a properly formatted justification for each initiative (sample attached) that includes the title, date of full operational capability, cost estimates for positions and funds for the number of years involved, problems to be addressed, statement of the proposal, and the coordination required. IMSS will inform division/staff chiefs regarding the date these forms are due in IMSS as soon as this information is available.

3. The OL Planning Officer, the staff/division chiefs, the C/NBPO, and the C/B&FB will then meet to prioritize all of the proposed OL initiatives and prepare a joint recommendation for final selection and ranking by the D/L for submission to the DDA. Following this meeting, the same group will meet with the D/L, and the prioritized list will be revised/finalized and then submitted to the DDA. Initiatives are handled thereafter by the C/B&FB, with the assistance of the Planning Officer/IMSS. Approved initiatives will be included in the budget.

Attachment:
Sample of format

DDA/OL

(Title of Initiative)

Cost Estimate

FY
89

FY
90

FY
91

FY
92

FY
93

Positions:

Funds:

Problem to be Addressed:

Proposal:

Coordination:

OBJECTIVES AND MILESTONE CHARTS

1. Each fall, usually in September, the C/IMSS asks division and staff chiefs to submit at least a few suggested Directorate- and Office-level objectives from each component for the coming fiscal year. These are discussed at the Fall OL Planning Conference and selections are made shortly thereafter. Divisions/staffs are asked at that time to prepare milestone charts for the MBOs chosen.

2. The C/IMSS will request that each division/staff chief submit to IMSS by 5 October a minimum of three or four major, prioritized objectives for FY 88 in support of the D/L's "Action Plan 1986/88" or updated version thereof. In addition, one or two personnel-related objectives should be submitted from each component in recognition of the fact that quality personnel management is OL's most important goal and that OL is committed to making its career service the best in the Agency. Included should be a title and brief narrative description of the proposed objective, plus the category of the plan (Group A, B, or C) it supports.

3. After the planning conference, the division/staff chiefs are required to submit a revised list of the proposed initiatives, objectives, projects, and studies to IMSS by 30 October for review by the D/L. This revised list should reflect the revisions agreed to at the planning conference (i.e., title changes, objective tracking level changes, and additions or deletions to the list, etc.). In early November, the D/L will review the revised list, and IMSS will send the approved revised list to the OL components. Detailed milestone charts for each chosen objective are due in IMSS by 13 November 1987.

4. When selecting possible objectives, keep in mind that an objective should not be contingent on additional resources (either funding or personnel). It should be achievable within present resources and worded to encompass only what can be accomplished during a single fiscal year (even though an overall objective actually may span more than one year).

5. A sample format for milestone charts is attached. So that all milestone charts are uniform, please do the following:

- Center either "Directorate-level" or "Office-level" at the top.
- After "quarter ending," insert the proper date for the end of the quarter being reported upon; i.e., 31 Dec 8-, 31 Mar 8-, 30 June 8-, etc.
- In the upper right-hand corner, indicate whether it is Group A, B, or C (Critical, Essential, or Important - per the D/L's Action Plan).

Objectives and Milestone Charts (continued)

- Begin each milestone activity with a verb, such as "develop," "prepare," "initiate."
- Enter an "X" in the month(s) where your scheduled "O" milestone has been accomplished or put dashes between the scheduled "O" milestone to the month of the anticipated new rescheduled completion; e.g., "O"-----"O". If a scheduled milestone was not met, it's important that you explain why. Also please include, at the bottom or on the back of the page, a very short note giving the updated status, etc., for the quarter being reported on.
- Be sure to include the classification at the top and bottom of the page.

5. IMSS keeps a list of the Directorate- and Office-level MBOs along with a copy of all milestone charts. IMSS assigns a number to each MBO when the list is compiled at the beginning of each fiscal year; this number should be used on the milestone chart when it is updated or referred to.

6. Updated milestone charts are due in IMSS on the following dates:

- 31 Dec 8_ - end of 1st Qtr of each fiscal year.
- 31 Mar 8_ - end of 2nd Qtr of each fiscal year.
- 30 Jun 8_ - end of 3rd Qtr of each fiscal year.
- 30 Sep 8_ - end of 4th Qtr of each fiscal year.

7. Division and staff chiefs should be prepared to brief the D/L on MBOs at their first biweekly meeting after the end of each quarter unless otherwise notified. (C/P&TS and C/SS review their MBOs with the EO/OL and DD/L.)

Attachment:
Sample milestone chart

PROJECTS AND STUDIES

1. Each fall, usually in September, the D/L asks division and staff chiefs to submit at least a few suggested projects and studies from each component for the coming fiscal year. These are discussed at the Fall OL Planning Conference, and selections are made shortly thereafter.

2. The D/L requests that each division/staff chief submit to IMSS by 5 October prioritized lists of projects and studies for FY 88 in support of the D/L's "Action Plan 1986-1988" or updated version thereof. Included should be a title and brief narrative description of the proposed project or study.

3. Projects and studies should not be contingent on additional resources (either funding or personnel). They should be achievable within present resources and worded to encompass only what can be accomplished during a single fiscal year (even though a project or study actually may span more than one year).

4. A project is a tasking agreed to by the D/L and the component head which will be reported on in their biweekly meetings when significant updates are deemed necessary by either the D/L or the component heads.

5. A study is a research effort into the feasibility or practicality of an idea which could ultimately become a project, objective, or even an initiative.

OL QUARTERLY

1. The OL Quarterly is usually held approximately 6 weeks after the end of each quarter of the fiscal year. It is given twice each quarter on consecutive days--in the Headquarters Auditorium on the first day and in [] on the second day. A "Dry Run" takes place approximately 10 days prior to the OL Quarterly. We suggest that speakers also have a "Dry Run" with their division/staff chief before the formal one with the D/L.

2. At the Quarterly held in the Headquarters Auditorium, the DDA presents awards to the OL Employees of the Quarter. Subsequently, individual speakers give their presentations; the C/P&TS/OL speaks briefly on general personnel topics; the C/IMSS gives a short update on OL activities for the quarter or significant accomplishments for the year following the 4th quarter; and then a question-and-answer period follows closing remarks by the D/L.

3. Reports on quarterly activities for the first three quarters are usually due in IMSS by the 10th of the month following the end of the quarter being reported upon; i.e., 10 January for the 1st Qtr, 10 April for the 2nd Qtr, and 10 July for the 3rd Qtr.

4. At the OL Quarterly for the fourth quarter FY 86, the C/IMSS gave an overview of OL significant accomplishments for FY 87 rather than activities for the fourth quarter only. Reports of significant accomplishments for FY 87 and appropriate statistical comparisons with FY 86 should be forwarded to C/IMSS by 9 October 1987. Records regarding fourth quarter activities, along with appropriate statistical comparisons for the quarter, should be maintained by divisions/staffs; but these need not be sent to C/IMSS.

5. Quarterly reports should consist of descriptive narratives on activities or accomplishments, including routine, bread-and-butter functions and, when the subject permits, an appropriate picture, slide, or draft recommended graphic; substantial cost savings realized or anticipated; large or special support projects; and other activities performed under unusual or especially difficult circumstances or in a particularly timely manner. Appropriate statistical comparisons with the same quarter of the previous year should be included in the reports.

OL Quarterly (continued)

6. Suggested topics for the OL Quarterly should be forwarded to IMSS about two weeks before the end of each quarter or may be telephoned to the IMSS Planning Officer, [redacted] at any time. The subjects should be educational and/or help logisticians to do their jobs better. The division or staff suggesting a topic should be prepared to furnish a speaker to make the presentation at the next quarterly meeting. The speaker should have appropriate slides made and forwarded to IMSS prior to the "Dry Run" mentioned in paragraph 1.

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BRIEFING POINTERS for OL QUARTERLIES

1. Know your subject thoroughly.
2. Be sure your presentation is appropriate for the audience and location.
3. Use slides instead of vugraphs. Coordinate with Linda [redacted] Design & Presentations Center, P&PD, GJ4008 HQ, [redacted] early, for guidance/suggestions on your slides. Remember that P&PD must have time to work on them -- and that you'll need them for the "Dry Run" with the D/L (item 11 below).
4. Keep slides simple. They should add to, not be, the presentation. Make sure all are of uniform good quality and are horizontal pictures, not vertical, for the HQ Auditorium.
5. If you'll use notes, have them typed double-spaced on 8 1/2- x 11-inch paper for insertion in a notebook (which IMSS will prepare and have ready for use on the speaker's stand), but DO NOT READ NOTES - MEMORIZE THEM.
6. Practice your presentation in front of a mirror. Time your talk with your visual aids. To keep to the one hour allotted, it's essential to hold your presentation to 10 minutes or less.
7. When you begin, introduce yourself and state what you'll be talking about. When you finish, introduce the next speaker ("Our next speaker will be _____" or "I'll be followed by _____," etc.)
8. Face the audience, not the slides. Glance at the slide to make sure it's the correct one and, if suitable, use a pointer. (If you plan to use the electric-beam pointer in the HQ Auditorium, practice with it beforehand. This pointer is hard to control; to keep it from dancing all over the screen, point it toward the floor when you're not actually pointing.)

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Briefing Pointers for OL Quarterlies (continued)

- STAT 9. [] you'll have a remote device you can operate yourself to change your slides (practice with this just before the "Dry Run"). In HQ Auditorium you must press hard on the button on the right of the lectern to signal the control-booth operator to change the slides (meaning you won't have quite the same instantaneous response). You can practice with this the day of the presentation.
10. Inject some humor if possible. Tell a brief anecdote if appropriate.
11. Have a "Dry Run" with your division/staff chief and/or the IMSS Planning Officer before the official "Dry Run" with the D/L.
- STAT 12. On the day of the official "Dry Run," arrive at [] about 45 minutes early to allow time to insert your slides into the slide tray and run through them once and to test the sound level for your voice.
- STAT 13. Remember that you'll be making your presentation both days -- in the HQ Auditorium []
14. For the actual presentations, arrive at least one hour early if you're bringing your slides; 30 minutes early if they're already in the tray.
15. Enjoy yourself. We're all "family."

SIGNIFICANT ACCOMPLISHMENTS

1. An annual report of significant accomplishments for the previous fiscal year is due in IMSS from each division and staff on 9 October 1987. Submissions for FY 87 will be used in an overview of OL's accomplishments during the past fiscal year, to be given at the November 1987 OL Quarterly.

2. These reports should contain a very brief summary (topic with one- or two-sentence description) of each component's significant accomplishments for FY 87. Appropriate statistical comparisons with FY 86 should be included.

3. To facilitate preparation of the report, divisions and staffs should consider inputting this information into the Wang on a weekly basis (perhaps selecting such items when preparing their own Weekly Report). Thus, the data would be in a document on the Wang when the reports of significant accomplishments -- and quarterly activities -- are required.

FIVE-YEAR PLAN

1. The first step in updating the OL Five-Year Plan is taken in the fall each year, when IMSS sends division/staff chiefs copies of the D/L's most recent Action Plan, along with the current OL Five-Year Plan. The latter addresses OL's assumptions and goals (which support those of the DA) five years into the future, including the projected outlook for requirements levied on OL; OL's financial and personnel resources, space, and facilities; OL's goals for meeting those requirements with the resources anticipated; and OL's projections for the future.

2. Recipients are asked to update the narrative portions of the plan in conformance with the D/L's Action Plan and prepare milestone charts for each new FY 88 objective. To assist divisions and staffs, IMSS sends a list of the proposed Directorate- and Office-level objectives, budget initiatives, projects, and studies for the coming year (discussed at the October OL Planning Conference). The revised narrative, list of objectives (with milestone charts for each), and lists of budget initiatives, projects, and studies become OL's new Five-Year Plan.

3. Divisions/staffs must send to IMSS by 13 November the following:

- a. Your milestone charts for new objectives for FY 88.
- b. Your list of approved additional initiatives for FY 90 and new initiatives for FY 91.
- c. Your list of approved projects and studies for FY 88.
- d. Your suggested updates (for the next five-year period) to the narrative portions of the current OL Five-Year Plan (i.e., Introduction, Assumptions, Goals, Resource Implications, and OL's projections for the future).

4. Milestone charts should be prepared in accordance with instructions in the "MBOs and Milestone Charts" portion of this planning guide. (Properly formatted justifications for additional initiatives for FY 90 and new initiatives for FY 91 should be prepared when directed to do so, but these forms are not included in the Five-Year Plan.)

RESEARCH AND DEVELOPMENT PLANNING CYCLE

1. The objective of the DS&T Research and Development (R&D) planning process is to plan a coordinated program of research, development and engineering that responds to the needs of the Intelligence Community and continues the advancement of state-of-the art technology. The Planning and Resources Staff (P&RS), DS&T, begins the process by requesting prioritized requirements from customer organizations.

2. IMSS forwards memoranda from the DDA and P&RS/DS&T, along with appropriate attachments, to OL divisions/staffs for review, and requests that any ideas for research and development be submitted to IMSS in time to meet the suspense date set by the DDA. We have shown a tentative due date of 21 September 1987 on the Planning Calendar, but this is subject to change. IMSS will advise you as soon as this information is received.

DCI - ANNUAL REPORT TO CONGRESS

1. Usually in December each year, OL is asked to give the DDA information for inclusion in the DCI's Annual Report to Congress. OL's response is usually due approximately one week after receipt of the request from the DDA. For planning purposes, we have therefore scheduled receipt of reports from divisions and staffs for 15 December. This is subject to change depending upon the tasking received from the DDA. IMSS will give you details in this regard as soon as we receive them.

2. In 1985 the DCI's report was organized around a set of intelligence objectives and issues intended to echo themes set forth in the National Foreign Intelligence Strategy (NFIS). The 1986 report did the same, but within the context of a discussion of such topics as consumer demands, the changing intelligence environment, and the need for flexibility in structuring resources. As in the past, notable achievements and shortfalls were emphasized. Photographs or other graphics were requested for possible inclusion in the final report.

3. Information was requested for three categories in 1986:

a. Consumer needs. Discussion of the major requirements and demands placed on us by consumers, citing examples of global, regional, operational, or other requirements that have significantly affected resources.

b. Specific examples of significant activities which called for the provision of intelligence support in 1986

c. Application of broad guidance contained in the NFIS. Preservation of core capabilities in an era of deficit reduction, etc.

4. As suggested under the heading of "Significant Accomplishments," weekly recording on the Wang of significant accomplishments (perhaps when writing the Weekly Report) would also help in preparing OL's submission to the DDA for the DCI's Annual Report to Congress.

STAT

EXECUTIVE CONFERENCE

1. The Executive Conference in late winter is for the purpose of discussing some "gut" issues and problems that confront individual offices in OL, as well as to assess our past responsiveness, efficiency, and potential for future improvements. Like the fall planning conference, it is usually held at an out-of-town conference facility. However, the only participants are division chiefs and the C/IMSS, plus the D/L, DD/L, and EO/OL. Since it is intended to foster as much communication as possible, the schedule is very flexible, and no official transcript is made of the meetings.

2. The AEO/OL is the conference coordinator.

OL EMERGENCY PROCEDURES MANUAL

1. The OL Emergency Procedures Manual is intended to provide essential guidance and appropriate contact information needed to handle emergency situations in the Washington Metropolitan Area.

2. Some of the information contained therein is perishable; therefore, IMSS usually sends copies of pertinent sections to the divisions responsible for emergency actions on the Headquarters Compound and at Agency-occupied external buildings for updating in May. The manual should be updated at other times of the year in response to major component reorganizations or procedural changes.

3. The information contained in the manual has been input into the Wang in IMSS. Divisions are responsible for updating their portion of the manual and sending it via telecommunications to IMSS for inclusion in the master file and for distribution by IMSS to holders of the manual.

4. Each OL division and staff has been provided with a copy of the OL Emergency Procedures Manual. Duty officers should be informed of its location.

EXCELLENCE

1. The former DCI's program in pursuit of excellence in the Agency was ongoing. Initially, the DCI solicited suggestions regarding ways to increase or further excellence in the Agency. However, later requests, approximately every 3 months, asked for examples of excellence manifested by initiatives taken by, or the outstanding performance of, individuals or components. While we don't know whether or not the present DCI will continue the "Excellence" program, we should be prepared to provide examples if requested to do so.

2. As to the format, unless directed otherwise, information should be provided in a brief descriptive paragraph noting the name(s) of the individual(s) concerned, his or her grade and job title, what was involved, and why the example is worthy of recognition. Included as a separate paragraph should be a statement noting what, if any, recognition was made of this event (realizing that in many cases, such examples do not merit specific cash awards, etc., but are simply employees doing their job in an outstanding fashion).

3. Supervisors should recognize sustained superior performance by recommending Quality Step Increases and should reward employees for initiative and/or excellence by suggesting other awards as appropriate. Division/staff chiefs also should remind employees periodically to seek ways to improve Agency operations and to make suggestions in this regard.

4. With these periodic requirements in mind, we suggest that you keep a current, ongoing record of individual/component excellence within your division/staff.

5. The Director of Logistics includes in the weekly OL Staff Notes information regarding recipients of QSIs, awards, and letters of appreciation. The Planning Officer/IMSS now receives a copy of the notes and maintains a file on them for future reference.

C - FIVE-YEAR
PLAN

6 MAR 1987

MEMORANDUM FOR: Chief, New Building Project Office, OL
Chief, Personnel and Training Staff, OL
Chief, Procurement Management Staff, OL
Chief, Security Staff, OL
Chief, Budget and Fiscal Branch, OL
Chief, Facilities Management Division, OL
Chief, Printing & Photography Division, OL
Chief, Procurement Division, OL
Chief, Real Estate & Construction Division, OL
Chief, Supply Division, OL

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[Redacted]

Chief, OC-OL/Information Services Center

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FROM:

[Redacted]

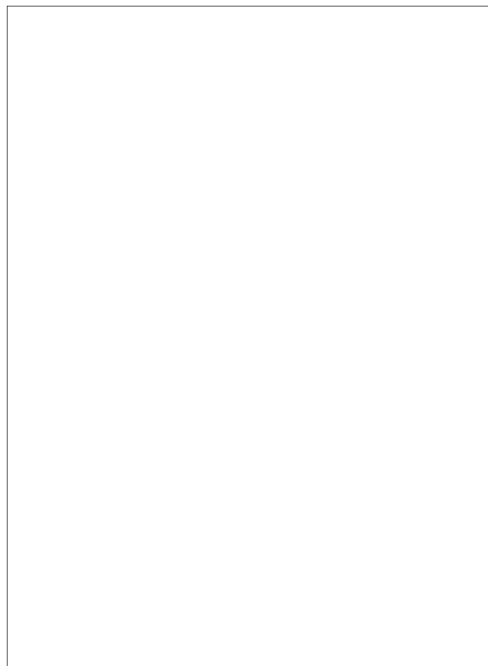
Director of Logistics

SUBJECT: Office of Logistics Five-Year Plan FY 1987-1991

1. Attached is the OL Five-Year Plan for FY 1987-1991 drafted by the Information and Management Support Staff/OL. It includes all identified FY87 objectives, projects, and proposed OL initiatives with guidance from the DA Action Agenda and the OL Action Plan. It also contains sections on assumptions, resource implications and a long term forecast.

2. Please use this document as a guide and a reminder of the directions we have set for OL. We will add to it as we progress. Thank you for your efforts in building this plan over the past several months.

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OFFICE OF LOGISTICS FIVE-YEAR PLAN

FY 1987-1991

PREPARED BY THE INFORMATION AND MANAGEMENT SUPPORT STAFF/OL

DECEMBER 1986

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OFFICE OF LOGISTICS FIVE-YEAR PLAN

FY 1987-1991

I. Introduction.

The Office of Logistics (OL) is a service organization. OL supports Agency activities worldwide by acquiring, storing, shipping, and disposing of material, using both commercial and Government services; negotiating and administering contracts with commercial organizations and agreements with other government agencies for the supply of goods and nonpersonal services to meet both domestic and overseas requirements; operating a facility capable of producing high-quality printing and photographic products, particularly for the intelligence-producing elements of the Agency and other intelligence/foreign affairs agencies; operating a motor pool serving the entire Headquarters area; providing mail and courier services capable of handling and protecting highly sensitive materials of all classifications; maintaining and managing copiers used throughout the Agency; and supervising the acquisition, construction, renovation, maintenance, operation, and disposal of real property. OL also provides logistics support to selected elements of the Intelligence Community. [redacted]

In-house support includes the management and control of inventory stock levels and property in use; and the receipt, storage, and issue of general purpose, technical and paramilitary stock. [redacted]

[redacted] facility support includes general housekeeping in the Washington area, and the acquisition and maintenance of equipment for Agency operations. [redacted]

During the next five years, OL will be faced with the continuing challenge of meeting ever-increasing demands with the same or limited increases in resources. The effects of these limited resources must be offset by increased productivity, which can be achieved only through the aggressive and efficient use of dynamic and creative management skills, innovative procedures, automated systems, and cross-training and ongoing motivation of our personnel. [redacted]

The purpose of this plan is to assign OL's organizational priorities, ensure that emphasis is placed on those activities where it is most needed, and direct our resources for the years 1987-91 in such a manner as to increase OL's productivity while strengthening our service orientation and our responsiveness to the many users of OL support. [redacted]

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OL FIVE-YEAR PLAN, FY 1987-1991 (cont'd)

II. Goals. Responsiveness is the common goal that crosses all OL division/staff lines and unites every OL component. It is the focus toward which every OL activity is aimed. Due to their diverse natures, however, OL divisions and staffs must establish both common and unique subordinate goals, as those goals become more specific and detailed. Goals of joint concern include the following:

A. Personnel.

1. Provide an effective personnel management system which promotes career development for the employee, is responsive to the changing needs of the Agency, and ensures that OL is competitive with private industry, the Federal work force, and other Agency components. Personnel management is OL's most important goal. OL intends to make it's career service the best in the Agency.

2. Recruit, train, and maintain a multi-skilled, highly motivated work force, equipped with the tools necessary to fulfill mission requirements.

3. Emphasize teamwork, integrity, responsible and reasoned risk-taking, and security-consciousness to promote and maintain a sense of pride in self and mission.

4. Maintain a comfortable, safe work environment that fosters maximum productivity for every employee; and promote a management philosophy that provides OL members with opportunities to utilize their abilities to the maximum extent, to develop both individually and as members of the overall logistics team through training, cross-training, and career development, to attain full potential, and to be recognized and rewarded for their performance.

5. Strive to select our managers from those who exemplify standards of excellence and are role models for their subordinates based on their qualifications, personal standards, and job performance.

B. Service. Provide high-quality service in a timely, efficient, professional, and courteous manner; encourage innovative, imaginative approaches to task performance, decision-making, and problem-solving; and maintain or, where possible, improve responsiveness through better planning, earlier and more thorough coordination, enhanced teamwork, high employee morale and motivation, and heightened productivity at all levels.

C. Use of resources. Maximize the effective use of current resources and upgrade/expand capital resources so as to ensure that intelligence products are provided and support rendered in the most timely and efficient manner possible.

D. Cost efficiencies and productivity. Exploit the potential for increased cost efficiencies, productivity, and responsiveness by maximizing the use of automated systems, delegating authority and responsibility to the

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OL FIVE-YEAR PLAN, FY 1987-1991 (cont'd)

most appropriate levels, encouraging the participation of OL employees in decision-making processes, and adopting appropriate cost-saving, efficiency-enhancing programs undertaken by other government entities and private industry.

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E. Work environment. Strive to improve the working environment of all Agency personnel while recognizing our responsibility to use space and facilities effectively and efficiently. Give special attention to providing a clean, safe and comfortable workplace and minimizing the disruption to personnel and operations during the new construction modifications and occupancy of the New Headquarters Building and the Old Headquarters Building.

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F. Planning. Enhance general efficiency and responsiveness by earlier planning for both customer requirements and staff/division needs; continue to emphasize disaster and emergency planning; and develop procedures for maintaining essential logistics support under adverse conditions.

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III. Assumptions.A. Requirements.

1. During the next five years, Agency resources are expected to stabilize. This anticipated stability in the resource base will translate into fewer new initiatives as a greater percentage of total resources are devoted to support requirements. Yet, rapid response will be even more critical than in the past because of terrorist activities, covert operations, paramilitary programs, targets of opportunity, and unanticipated and dynamically changing demands for support services.

2. Requirements for processing, storing, and transporting materiel are expected to increase, with routine needs to be met, plus support to operational programs, CRAFT, and moves into the New Headquarters Building (NHB) Those requirements will bring concomitant demands for additional space and personnel, and the need for automated packaging systems and mechanized storekeeping equipment.

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3. Automated systems must be fully and efficiently utilized to receive and process customer requirements; track customer requests, inventory stocks and materiel movements; provide the status of various work projects; control space configurations; and perform a multitude of other functions that support logistics activities. As requirements for Logistics Officers grow, ADP systems must be developed to assist them. To obtain the optimum use of these systems, OL must develop greater expertise in ADP. This can be accomplished by retraining selected personnel in OL disciplines, recruiting people with the requisite skills, and/or obtaining personnel on rotational assignments from the Office of Information Technology. Also, OL must improve computer literacy and understanding for all its people.

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OL FIVE-YEAR PLAN, FY 1987-1991 (cont'd)

25X1 B. Financial resources. Current prospects for the logistics budget indicate that its growth will not be proportionate to the growth in demand for goods and services. OL can anticipate little if any resource augmentation from new initiatives for FY 87 other than the Standard Support Requirements (SSRs).

C. Personnel resources.

25X1 1. Attrition through retirements is expected to increase during the next few years; and it will be difficult and challenging to acquire and retain professional, secretarial, and technical personnel. The importance of succession planning will become even more critical, as will adequate preparation of middle managers through training, cross-training and rotational assignments and the updating of skills training for technical personnel.

25X1 2. Growing support requirements, together with continued emphasis on decentralized logistics functions, will necessitate that a pool of talent be maintained from which to provide the mix of OL personnel to meet customer requirements. This pool will require ongoing recruiting and training efforts.

25X1 3. The personnel ceiling will remain relatively stable in FY 87; however, additional positions will be required in FY 88, 89, and 90. The types of OL positions, distribution of skills within OL, and training criteria for OL personnel will need to be realigned. These changes will be necessary to enable OL to provide maximum responsiveness to unique worldwide Agency logistical support requirements, particularly in procurement and real-estate and construction activities and in central supply services.

25X1 4. As the numbers of support personnel in the field are expected to either stabilize or decrease over the next five years, logistics personnel will be proportionally adjusted. The continuing threats from a hostile overseas environment will make the assignment of personnel overseas difficult, and even greater use of extended TDY assignments will be necessary if current responsiveness and levels of support are to be maintained. Use of special teams such as Allied's Tiger Team and the OL Flying Squad will be even more critical in order to enable OL to provide the skills needed on a priority basis throughout the world.

D. Space and facilities.

1. With increased materiel requirements, changing work environments, and the spread of advanced technical and automated systems will come increased demands for space. These needs will be partially but not

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OL FIVE-YEAR PLAN, FY 1987-1991 (cont'd)

25X1 completely met by the New Headquarters Building [redacted]
25X1 [redacted] Furthermore, the problems and
25X1 high costs associated with maintaining aging utility systems in the
Headquarters and other Agency buildings will continue to mount. [redacted]

25X1 2. The availability of the New Building and the renovated and
expanded powerhouse, [redacted]
25X1 buildings, together with the more direct management and control of
facilities operations, space, and systems, will begin to have a
beneficial impact. [redacted]

3. By 1989/90, the Agency's holdings will have been consolidated
into eight compounds, with leases relinquished or terminated for the
remaining Agency-occupied external buildings. [redacted]

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25X1 4. Occupancy of [redacted] the New Headquarters
Building, and the resulting shifts in the Old Headquarters Building and
the remaining external buildings, will necessitate a carefully planned
and managed system of configuration management. A comprehensive,
integrated plan of support covering the spectrum of logistics activities
from contracting and design, to renovations, to furniture and equipment
acquisition and storage, to moving and property turn-ins, will be
critical if the subsequent moves are to be made smoothly and in a timely
and efficient manner. [redacted]

25X1 E. Procurements. Pressure will mount to improve the Agency's
competitive procurements, in compliance with the Competition in Contracting
Act of 1984, and the percentage of contracts awarded to small businesses, as
well as to enhance industrial security of contractor personnel and
facilities. The latter will entail more frequent and/or more effective
security inspections. In addition, the numbers of cases brought before the
Agency Contract Review Board will increase, as dollar values of procurements
escalate over the next five years. And security concerns will make it
increasingly vital to establish a viable policy for identifying companies
under foreign ownership, control, or influence and for addressing the problems
related thereto. Implementation of the Coopers and Lybrand recommendations
will result in a restructuring of the procurement organization. [redacted]

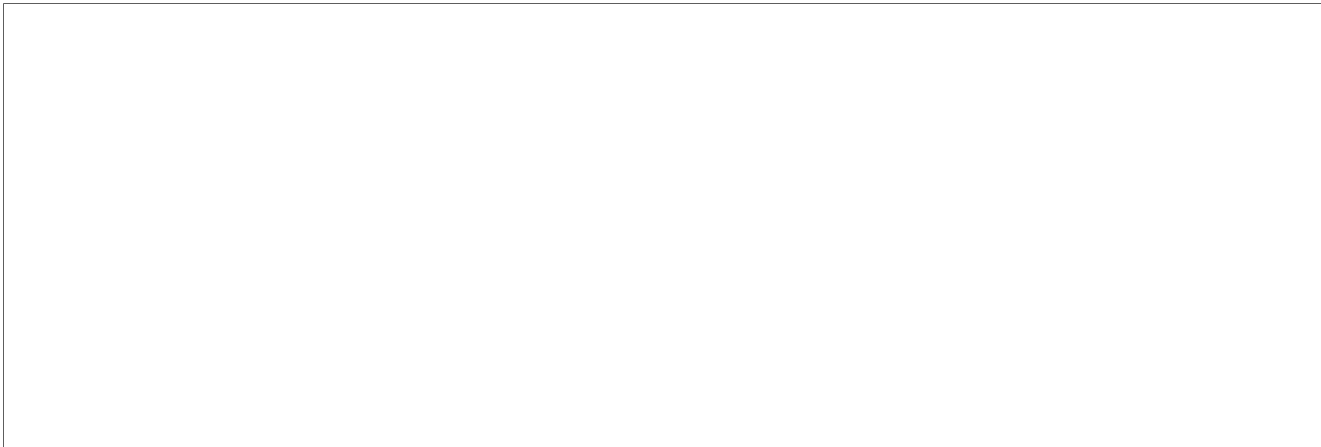
25X1 F. Energy. The cost of services such as transportation and utilities,
which are energy-intensive, will continue to increase, thus requiring
continued conservation efforts and efficient management of energy resources.
[redacted]

25X1 [redacted]

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SECRETOL FIVE-YEAR PLAN, FY 1987-1991 (cont'd)

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I. Information handling/production.

1. Agency and Intelligence Community requirements for printing, photographic, and presentation graphics production support will continue to increase. New initiatives will be undertaken to improve both the quality and timeliness of information output production, and to enhance the security of the facilities, equipment, and end product.

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2. Pressures will continue to reduce the voluminous amounts of paperwork and files and to develop efficient information-handling alternatives. The quality and efficiency of storage and retrieval systems for information handling will have to be improved.

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3. Cost efficiencies for the production of information must be realized through automation and joint OIT/OL initiatives in consolidated output media facilities.

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IV. Action Plan

1. In July of 1986, the Director of Logistics initiated an OL Action Plan, for FY-87 and FY-88, taking direction from the DA Action Agenda. The two-year OL Action Plan was concurred in by the DDA and has been used as a guide for development of all the objectives, projects, studies, and initiatives defined in this Five-Year Plan. Recently identified FY 89/90 initiatives were developed in light of the priority areas agreed to by the Executive Committee in October of 1986, as well. The OL Action Plan divides OL efforts into the following categories:

Group A - Critical

Group B - Essential

Group C - Important

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2. The operational activities included in Group A frequently involve life and death and are in alignment with the Agency's overall priorities. The finest logistics efforts are required for the successful

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OL FIVE-YEAR PLAN, FY 1987-1991 (cont'd)

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3. Within Group B are those activities wherein logistical support is essential but the significance of these activities is clearly several degrees less than those within Group A. The following are highlights of essential Group B objectives which OL will pursue during FY-87 and FY-88:

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a.

b.



c. Facility management activities involving the consolidation of Agency holdings by 1989/90 to eight compounds.

d. The New Building construction project.

e. The successful execution of the Integrated Logistics Support Plan covering the smooth transition into the Headquarters compound.

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4. Group C encompasses objectives that pertain to sustaining and improving essential OL mission capabilities. While these activities are important, they are clearly less significant than the critical activities in Group A and the essential activities in Group B. These objectives are less time critical, and OL resources devoted to them can be adjusted with respect to both time and allocations. The following are highlights of important Group C objectives which OL will pursue during FY-87 and FY-88:

a. The implementation of the Coopers and Lybrand Report.

b. The review and revamping of ADP support within OL.

c. CLAS.

d. Strengthening relationships with GSA and the Focal Point systems.

e. Clarifying FOCL.

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5. Of paramount importance to OL is an emphasis on developing employees to meet these challenges. With respect to personnel management, OL will continue to implement a Logistics Career Board and the rotating evaluation/promotion panel system. Information collected from a comprehensive review of all OL training programs will be used to improve training efforts. OL will pursue participation in the CT program with both internal and external candidates. The Supply Officer and Contract Officer Internal Training Programs will be enhanced. To the extent that it is feasible, OL personnel will be cross-trained so that they will be skilled in more than one discipline. The OL "Flying Squad" is an example of efforts in this regard. More cross-training is also

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OL FIVE-YEAR PLAN, FY 1987-1991 (cont'd)

being planned with respect to WG employees at [] and in the Facilities Management Division (FMD). Further, OL will encourage rotational assignments of OL personnel in other components of the DA and beyond. []

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6. OL also intends to sustain recognition of outstanding employees by initiating awards. The Director of Logistics has recognized a need for cohesive personnel management for the procurement work force. This is expected to be implemented in FY 87. Additionally, a plan will be established in FY 87 for the career development of OL middle/senior managers of the future, both in terms of training and assignments. []

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V. FY-87 Objectives

A. Directorate level objectives for FY 87 are listed below. Milestone charts are contained in section XIII of this paper.

1. (FMD) Develop comprehensive Integrated Logistics Support Plan (ILSP) for the HQ Compound consolidation.
2. (FMD) Backfill and upgrade the Old Headquarters Building (OHB).
3. (FMD) Expand HQ cafeteria in phases commensurate with population growth during HQ Compound consolidation.
4. (FMD) Expand EDR to meet new population at Headquarters.
5. (FMD) Develop an automated O&M program for the OHB.
6. (PMS) Coopers and Lybrand Implementation.
7. (P&PD) Implement "computer-to-plate" concept of digital prepress system.

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9. (PMS) Restructure procurement organization to implement changes recommended by Coopers & Lybrand and accepted by Agency management.

10. (P&TS) Maintain ongoing recruitment efforts to ensure "at ceiling" strength on 30 Sep 87.

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11. (RECD) [An unlisted objective] []

SECRETOL FIVE-YEAR PLAN, FY 1987-1991 (cont'd)

B. Office level objectives. Milestone charts for all FY-87 office level objectives (listed below) are retained in the Information & Management Support Staff, OL,

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1. (FMD) Provide cross-training opportunities for FMD wage-grade personnel with other sister components
2. (FMD) Review all FMD personnel training to ensure that FMD employees have up-to-date skills training and provide refresher training as required.
3. (FMD) Develop a core training program for personnel involved with facilities management (joint w/SD and RECD) (w/study).
4. (FMD) Reexamine all procedures for doing business and requests for services, with goal of streamlining same.
5. (FMD) Streamline disposal procedures in the HQ area (joint w/SD).
6. (PD) Develop ways to cope with the shortage of clerical personnel.
7. (PD) Establish a specific program for all PD personnel to visit their customers to enhance customer relations.
8. (P&PD) Establish P&PD Quarterly to keep personnel assigned to P&PD informed of problems facing P&PD and accomplishments made.
9. (P&PD) Identify and implement enhancements to secure printing.
10. (P&PD) Establish quality-control mechanism for printing.
11. (P&PD) Streamline bindery operations.
12. (P&PD) Establishment of a Printing & Photography Advisory Group (PPAG).
13. (P&PD) Identify required skills and provide refresher training.
14. (P&PD) Improve customer relations with and knowledge of P&PD.
15. (RECD) Support decentralized components.
16. (RECD) Enhance communications w/decentralized components.
17. (RECD) Design and renovate first floor
18. (RECD) Develop program for expanded use of Allied "Tiger Team" (joint with OL/FMD).

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OL FIVE-YEAR PLAN, FY 1987-1991 (cont'd)

19. (RECD) Review all RECD personnel training to ensure that RECD employees have up-to-date skills training and provide refresher training as required.

20. (RECD) Reexamine all procedures for doing business and requests for services, with goal of streamlining same.

21. (SD) Examine all overseas positions for uniformity of grades in relationship to responsibilities.

22. (SD) Improve the exchange of logistics information between SD and component logs officers and enhance SD span of control.

23. (SD) Enhance the development of SD human resources.

24. (SD) Enhance the management of SD human resources.

25. (SD) Review and upgrade technical training of every individual

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27. (SD) Improve year-end Annual Dollar Value (ADV) reporting procedures and the ADV Report.

28. (SD) Identify next geographic area for certification of accountable officers and implement program in that area.

29. (SD) Enhance customer services provided by Supply Division.

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31. (NBPO) Monitor and complete the road design for Rts. 123/193 and coordinate w/the State of VA the award of a construction contract.

32. (NBPO) Compile reference information to assist in writing a history of the New Building project.

33. (IMSS)^f Have CLAS Beta (test) site facility operational (IOC) by 30 Sep 87 (FOC by Oct 88).

34. (IMSS) Place an operational Field Computer System (FCS) in selected field sites.

35. (IMSS) Create a computer-based automated electronic 88

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~~SECRET~~OL FIVE-YEAR PLAN, FY 1987-1991 (cont'd)

36. (IMSS) Create universal Wang glossary for OL users.
37. (IMSS) Oversee scheduled reduction of OL paper file holdings in preparation for moves to the NHB (joint w/stfs and divs).
38. (IMSS) Eliminate/consolidate/revise all pre-1984 OL regulatory issuances (joint w/stfs and divs).
39. (IMSS) Implement barcode applications throughout OL (joint w/stfs and divs).
40. (PMS) Prepare CIA Contract Manual (CCM).
41. (PMS) Review contract teams.
42. (PMS) Contracting guide for training by independent contractors.
43. (PMS) Establish a program to enhance competition in contracting.
44. (P&TS) Conduct Phase II of OL training review.
45. (P&TS) Revise Employee Handbook.
46. (SS) Improve/strengthen the OL/SS Industrial Security Program.
47. (SS) Implement a revised FOCI program.
48. (SS) Institute/implement a security-awareness briefing program for OL.

VI. FY-87 Projects.

3. (FMD) Develop a building standard for overhaed lighting and ceiling configuration.

4. (FMD) Open new North Dock and establish more efficient receiving procedures during South Dock construction.

5. (FMD) Establish a Co-op Program w/the Culinary Institute of America.

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OL FIVE-YEAR PLAN, FY 1987-1991 (cont'd)

6. (FMD) Establish a HQ consolidation "moving team" cadre.
7. (FMD) Complete MIS activities. This includes supply, project management modules; the new EDR, parking management, and revised CRAMS/Enchilada programs; statistical package; and credentials list.
8. (FMD) Develop improved carpool-arrangement system.
9. (FMD) Reallocate HQ parking permits to conform to new parking-lot configuration and new visitor-parking area and to accommodate ride-sharing participants.
10. (FMD) Expedite Computer Aided Drafting and Design (CADD) capability for quick-start projects.
11. (FMD) Establish program for FMD/Opns oversight of after-hours operations.
12. (PD) Continue efforts to reduce contract-settlement backlog.
13. (PD) Develop standardization of equipment and consolidate contracts where feasible.
14. (P&PD) Conduct baseline survey of printing and photography in terms of current capabilities and customer requirements.
15. (P&PD) Improve P&PD's front-office environment.
16. (P&PD) Establish a P&PD history database for equipment, supplies, and production.
17. (P&PD) Provide electronic interfacing for computer graphics.
18. (P&PD) Survey major printing and photography equipment to determine life expectancy by contrasting current capabilities w/technological developments.
19. (P&PD) Establish photo morgue.
20. (RECD) Establish standards and procedures to control repairs/alterations in external buildings.
21. (RECD) Strengthen relationship with GSA and the Corps of Engineers.

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OL FIVE-YEAR PLAN, FY 1987-1991 (cont'd)

23. (NBPO) Develop plans and recommendations re NBPO's role in FY 87-88 (joint w/FMD).

24. (PMS) Publish Procurement Handbook for the Layman.

25. (PMS) Determine whether our negotiated fees and profits are too high.

26. (PMS) Conduct an educational program "Let the buyer beware -- what are true 'commercial' products and services?"

27. (PMS) Implement contractor-provided, in-house procurement training capability.

28. (SS) Enhance OL/SS's presentation at OL orientation.

25X1 29. (SS) Distribute the new Standard Security Procedures for Contractors (SSPC) Manual to all contractor security officers.

30. (SS) Improve present procedures for certifying security clearances/accesses to contractor facilities and/or other government agencies.

31. (SS) Study/analyze additional statistical reporting requirements needed for OL/SS to function and respond more efficiently.

25X1 25X1 32. (SS) Devise a relocation plan for the move to 1st floor to ensure uninterrupted service to contractors/Agency components.

33. (B&FB) Develop uniform standards for OL elements to use in monthly/quarterly budget-review process.

34. (B&FB) Enhance coordination among Finance Officers assigned to OL elements.

35. (P&TS) ~ Update/reorganize all OL/TO records.

36. (P&TS) = Input OL employee training records into the LETTS data base.

37. (IMSS) Plan for move of OL ADP equipment to NHB.

38. (IMSS) Oversee a review of OL forms. Revise/consolidate/cancel as needed.

OL FIVE-YEAR PLAN, FY 1987-1991 (cont'd)

39. (IMSS) Track implementation of information-handling recommendations made by the OIS audit team.

40. (IMSS) Examine channels and minimize number of categories for acquisitions/disposal of special-approval items (joint w/SD, FMD, PD, & PMS).

41. (IMSS) Publicize limitations/benefits of the Claims Act to eliminate recurring problems.

42. (IMSS) Following ongoing OL ADP review, implement approved OL ADP recommendations.

43. (IMSS) Study reorganization of OL and potential change of office name. (This is a project for the O-D/L)

VII. FY-87 studies.

1. (FMD) Career cognizance over facility management personnel (i.e., MLS or MLR).

2. (FMD) Contracting out Motor Pool services.

3. (RECD) Development of Engineer/Architect Assistant Program.

4. (SD) Recommended enhancements to ASAPS data base.

5. (IMSS) Feasibility of establishing an OL ADP training program.

VIII. Established Initiatives

The following are established initiatives that have been approved by Congress and funded:

A. FY-87 Ongoing Initiatives

1. (NBPO) ~~New~~ Headquarters Building Support.

2. (IMSS) Commercial Logistics Applications Systems (CLAS).

IX. Externally Approved Initiatives

The following are initiatives that have been Agency approved and externally approved by the IC Staff and the OMB:

SECRETOL FIVE-YEAR PLAN, FY 1987-1991 (cont'd)**A. FY-88 New Initiatives**

1. (OL) Logistics Position Shortfall.
2. (OL) Standard Support Requirements 1988.

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B. FY-89 New Initiatives

1. (OL) Standard Support Requirements 1989.
2. (P&PD) Printing and Photography Plant Expansion and Desktop Publishing.

X. Proposed Initiatives

The following are proposed initiatives that were presented at the OL Planning Conference in Fredericksburg in October of 1986. These have been approved by the Director of Logistics for submission to the DDA. The detailed description of these proposed initiatives are in a memorandum dated 5 January 1987 from the Director of Logistics to the Chief, DDA Management Staff. That memo is retained in the Information and Management Support Staff, OL,

A. FY-89 Additional New Proposed Initiatives

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2. (P&PD) Secure printing.
3. (PD) Industrial Security and Contracting.
4. (IMSS) Barcoding Expansion.

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7. (FMD) Scattergood-Thorne Plan.

B. FY-90 New Proposed Initiatives

1. (P&PD) HQ Auditorium renovation.

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OL FIVE-YEAR PLAN, FY 1987-1991 (cont'd)XI. Resource Implications

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A. The most critical resource constraint is personnel staffing. Since OL is a support/service organization, OL's capabilities and growth must be keyed to the requirements and growth of our customers. Personnel increases are projected as a need in all OL components to enable us to remain responsive to the increasing requirements, particularly [redacted] and in Procurement Division and Real Estate and Construction Division.

25X1
B. Funding shortages are projected for the forthcoming period. To the extent that these shortages delay or otherwise affect capital improvements, the effectiveness and responsiveness of OL will be degraded proportionally.

XII. Forecast

25X1
Five years from now we will hardly recognize the Office of Logistics as it exists today. World events, changing political climates, Agency priorities, emerging technologies, and budgetary considerations will all play a part in shaping the future; but, for the most part, these influences are beyond our control. The goals and action plan contained in this paper represent our commitment to shape the future of the Office of Logistics to the extent that we can, and to orchestrate the objectives, projects, and initiatives listed in this paper which will lead us there. [redacted]

A. Personnel

25X1
1. The personnel in the future of OL will generally have to be quick, flexible, computer-oriented, and multi-skilled. They will have to be quick because responsiveness is the common goal that crosses all OL division and staff lines; and while increased productivity will be necessary to meet expanding requirements, OL personnel resources are expected to stabilize. They will have to be flexible to meet changing priorities. They will have to be computer-oriented because they will be corresponding and conducting business through ADP terminals. They will have to be multi-skilled because, in addition to primary duties, they will have to interface with complex technologies and almost everyone will access information through terminals. [redacted]

25X1
2. Because we expect all this from our people, OL is determined to have a more effective personnel management system that promotes career development and ensures that OL is competitive with private industry, the Federal work force, and other Agency components. OL will provide more in-house training, cross-training, and recognition and reward for high performance. [redacted]

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OL FIVE-YEAR PLAN, FY 1987-1991 (cont'd)

25X1 3. In the future, we expect that there will be more emphasis on contracting for services for some specified job skills and certain hard-to-fill positions. The key will be to obtain a desirable mix of staff and contracted services which does not erode good control and security. There will also be an increase in the use of special teams such as Allied's Tiger Team and the OL Flying Squad to enable OL to provide skills needed on a priority basis throughout the world.

B. Space and Facilities

25X1 1. By 1990, the Office of Logistics plans to be centrally based in the New Headquarters Building in a more modern and functional environment. The Agency's holdings will have been consolidated into eight compounds, with leases relinquished or terminated for the remaining Agency-occupied external buildings. will be occupied, and several snifts in the Old Headquarters Building and the remaining external buildings will be completed following the guidance of an Integrated Logistics Support Plan (ILSP) directed by the Office of Logistics. The configuration management effort to get us there will involve contracting and design, renovations, furniture and equipment acquisition and storage, and subsequent moves.

25X1

25X1

C. Automation

25X1 1. Automation will play a key role in shaping OL's future. It will dramatically alter the way we do business and will result in far greater productivity from existing personnel resources.

25X1 2. As part of the New Headquarters Building project, a new secure digital voice and data communications network will be installed to serve both the New and Old Headquarters Buildings. Also planned is the transmission of non-broadcast video and the installation of fiber optics cabling to meet future requirements for Local Area Networks. Within the next few years, the Office of Information Technology (OIT) will support a large range of software products on a family of personal computers (PCs) that are IBM compatible and capable of emulating an IBM 3270 terminal. Also, some brand of IBM 3270 protocol terminal(s) will be selected to replace the existing Delta Datas.

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OL FIVE-YEAR PLAN, FY 1987-1991 (cont'd)

3. The Office of Logistics will have an initial operating capability for the Commercial Logistics Applications System (CLAS) in FY 88. CLAS will automate the supply and procurement systems for the acquisition of goods and services. The present Contract Information System (CONIF) and Inventory Control System (ICS) will give way to CLAS, which will operate under the OIT-based Corporate Data System. CLAS will handle inventory management, supply cataloging and requisitioning, vendor payment, general ledger, and procurement. An automated Form 88 will be available to expedite processing of customer requests with electronic requisitioning and approvals. Eventually, we will employ an automated budget formulation package in real time with accounts payable on-line.

25X1 Additionally, OL will develop new applications for barcoding, will place an operational Field Computer System (FCS) in selected field sites, and will provide a "computer-to-plate" digital prepress system to expedite processing of text material to the presses.

25X1 D. Security

E. Reorganization

1. At present, the Office of Logistics is embarking upon a study on reorganization and potential renaming of OL. Charters for the divisions and staffs will be reviewed with emphasis on examining for overlap of functions and outdated responsibilities. OL will be more functionally consolidated following review and recommendations. The Coopers and Lybrand Study of Agency procurement functions is now complete, and recommendations that were approved by the Agency will be implemented during FY 87/88.

2. All OL divisions and staffs will reexamine procedures and develop plans for improving customer service, response times, and communication. Reorganization specifics have not yet been fully defined, but it is clear

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OL FIVE-YEAR PLAN, FY 1987-1991 (cont'd)

that the OL reorganization that will ensue will develop under the guidance of the DA Action Agenda and the priority areas agreed to by the Executive Committee in October of 1986.

XIII. Milestone Charts for Directorate-Level Objectives

Attached are milestone charts for the FY-87 Directorate-level objectives listed in section V.A. of this Five-Year Plan. Milestone charts for all FY-87 office-level objectives listed in section V.B. are retained in the Information and Management Support Staff, OL,

25X1

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Level of Objective: X Directorate, Office, Division/Staff

Office: PMD
 Title of Objective: Develop Comprehensive ILSP for the HQS
 Compound Consolidation

Category: B (essential)

Responsible Officer:
 Significant Funding Amount: \$ FY 87
 FY beginning X 1 Oct or Quarter Ending 31 Dec, 31 Mar, 30 Jun, 30 Sep

0 - Scheduled
 X - Actual

ACTIVITIES PLANNED	Quarter 1			Quarter 2			Quarter 3			Quarter 4		
	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP
1. Develop ILSP master relocation schedule	0											
2. Develop waste disposal plan		0										
3. Finalize HQS parking concept			0									
4. Write master move plan				0								
5. Determine Fit-up plan for NIB					0							
6. Develop revised transportation schedule						0						
7. Develop revised courier schedule						0						
8. Develop supply room concept <u> </u>						0						
9. Develop move checklists							0					
10. Write Employee Move Handbook								0				
11. Finalize component move requirements									0			
(more on pg. 2)												

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Level of Objective: Directorate, Office, Division/Staff

Office: FMD

Title of Objective: Develop an Integrated Logistics Support Plan (ILSP)

Responsible Officer: [Redacted]

Significant Funding Amount: \$

FY 87

FY beginning 1 Oct or Quarter Ending 31 Dec, 31 Mar, 30 Jun, 30 Sep

0 - Scheduled
X - Actual

ACTIVITIES PLANNED	Quarter 1			Quarter 2			Quarter 3			Quarter 4		
	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP
12. Develop PTT Master Plan							0					
13. Develop HIB Operations Plan											0	
14. Refine operations procedures for HQS compound												0
15. Hold inter-directorate working group mtgs	0	0	0	0	0	0	0	0	0	0	0	0
16. Visit/Brief moving components				0	0	0	0	0	0	0	0	0

Level of Objective: X Directorate, ___ Office, ___ Division/Staff

Office: PMO Category: B (essential)
 Title of Objective: Backfill & Upgrade Old Headquarters Building (OHB)
 Responsible Officer: [Redacted]
 Significant Funding Amount: FY 97 0 - Scheduled
 FY beginning X 1 Oct or Quarter Ending ___ 31 Dec, ___ 31 Mar, ___ 30 Jun, ___ 30 Sep X - Actual

ACTIVITIES PLANNED	Quarter 1			Quarter 2			Quarter 3			Quarter 4		
	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP
1. Establish focal points in directorates for discussing backfill matters.		0										
2. Establish master schedule for backfill, space renovation, and utility upgrade project through Phase 1 of construction		0										
3. Establish rehab coordination group for project (HCS/OL, Operations/OL, Safety Staff, OPT, Allied, HSP).			0									
4. Working with directorates, reach agreement on who is staying in OHB, who is leaving OHB, and office-level square foot requirements for OHB when everyone who will ultimately reside here is on board. This will be put under the Configuration Management control.			0									
5. Develop preliminary models of options for sequencing space renovation and backfill (see note).			0									
6. Develop preliminary costs for the space renovation options (see note).			0									
7. Decision on extent of space rehab (see note).					0							
8. Working with directorates, reach agreement on final space reallocation/office consolidation & put under Configuration Management control.						0						

(more on pg. 2)

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Level of Objective: Directorate, Office, Division/Staff

Office: PMD
 Title of Objective: Backfill & Upgrade Old Headquarters Building(OHB)
 Responsible Officer:
 Significant Funding Amount: FY 87
 FY beginning 1 Oct or Quarter Ending 31 Dec, 31 Mar, 30 Jun, 30 Sep
 0 - Scheduled
 X - Actual

ACTIVITIES PLANNED	Quarter 1			Quarter 2			Quarter 3			Quarter 4		
	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP
9. Complete development of OIT, OS, and safety construction requirements and put under Configuration control						0						
10. Submit preferred phasing alternative for decision and submit to A/E.						0						
11. Submit scope of work to A/E and begin building survey.						0						
12. Complete HVAC study (see note).							0					
13. Working with directorates complete component individual design requirements for Phase I design effort.							0					
14. Complete building standards (see note).							0					
15. A/E firm completes review and assessment of HCS planning data.							0					
16. Complete outline of engineering rehab plan.								0				
17. Provide firm recommendations and cost estimates for utility upgrade.								0				
18. A/E begins design drawings for phased const.								0				
19. Decision on extent of utility upgrades (see note)									0			

(more on pg. 3)

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Level of Objective: X Directorate, Office, Division/Staff

Office: FMD
 Title of Objective: Backfill and Upgrade Old Headquarters Building (OHB)
 Responsible Officer: [Redacted]
 Significant Funding Amount: [Redacted]
 FY '37: 0 - Scheduled
 FY beginning X 1 Oct of Quarter Ending 31 Dec, 31 Mar, 30 Jun, 30 Sep X - Actual

ACTIVITIES PLANNED	Quarter 1			Quarter 2			Quarter 3			Quarter 4		
	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP
20. A/E begins design drawings for utility upgrade.										0		
21. A/E completes construction drawings for Phase I.											0	
22. Complete government review of Phase I construction drawings.											0	
23. Construction bid package out for Phase I.												0
24. Construction managers on board ICS. (see pg. 4 for notes)												0

NOTES:

5. Will include cafeteria and EDR expansion even though these items are presently funded outside backfill and may be managed separately. Work on this objective begins with our perception of what the final allocation of space should be and then works backward from that point to determine how to get there. Drivers will be office consolidation and moves out of the new building. Vacated space will be used for intermediate moves of residents to allow huge chunks of space to be renovated. We will work with directorates on this.

6. We have already developed a cost model which can be applied to the space rehab options. This model is constructed to support the budgetary decision process, allowing discrete items to be selected in or out, depending on the extent of rehab desired/affordable.

7. Studies conducted by FM/Engineering on electrical capacity, energy conservation, and the powerhouse will be completed in the December/January period. The all-important HVAC study will not be completed until April. Nonetheless, by February we should have sufficient grasp of the utility upgrades needed to render possible decision on the split of funds between central system upgrade and office and computer space rehab. Decision is required at this point to comply with budget call.

12. HCS is providing project manager for this.

14. This includes the ceiling/lighting standards previously submitted by Design Branch as a project.

19. Refer to note 7. May require adjustments to budget submission.

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Level of Objective: Directorate, Office, Division/Staff

Office: FMD

Category: B (essential)

Title of Objective: Expand HQ Cafeteria in phases commensurate with population growth during HQ compound consolidation.

Responsible Officer: [Redacted]

Significant Funding Amount: [Redacted] FY 87

FY beginning 1 Oct or Quarter Ending 31 Dec, 31 Mar, 30 Jun, 30 Sep

0 - Scheduled
X - Actual

STAT
STAT

ACTIVITIES PLANNED	Quarter 1			Quarter 2			Quarter 3			Quarter 4		
	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP
1. Brief D/L 'about' project background & scope	0											
2. Define scope of AE services	0											
3. Select AE		0	0									
4. Award AE contract			0	0								
5. Develop operational requirements for Cafe & CU, evaluate alternative concepts, estimate budgets, schedule project phases, project master plan				0			0					
6. Agency review/approval of concepts, budget, schedule							0					
7. Final design dwgs/specs f/project phase								0				
8. Order furniture for each phase									0			
9. Construct phases of the project during Dec 1987 to Nov 1988												

Dec 87

Dec 87

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Level of Objective: Directorate, Office, Division/Staff

Category: B (essential)

Office: FMD

Title of Objective: Expand EDR to Meet New Population at Headquarters

Responsible Officer:

Significant Funding Amount: FY 87

FY beginning 1 Oct or Quarter Ending 31 Dec, 31 Mar, 30 Jun, 30 Sep

0 - Scheduled
X - Actual

STAT
STAT

ACTIVITIES PLANNED	Quarter 1			Quarter 2			Quarter 3			Quarter 4		
	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP
1. Define scope of AB services			0	0								
2. Select AE, award AE contract					0	0						
3. Develop design concepts, configuration of cooking, serving, storage, dining areas; project phasing to support operations and budget							0			0		
4. Agency approval of concepts and budget											0	
5. Construction drawings, specifications, final design (August 1987 thru February 1988)											0	
6. Construction of new kitchen space, new dining room start late is estimated early 1989; dependent on OIB backfill schedule											0	

FY-88

~~ADMINISTRATIVE - INTERNAL USE ONLY~~

Level of Objective: Directorate, Office, Division/Staff

Category: B (essential)

Office: EB/OPS/FMD/OL

Title of Objective: Develop an Automated O&M Program for the OHB

Responsible Officer:

Significant Funding Amount: FY 87

FY beginning 1 Oct or Quarter Ending 31 Dec, 31 Mar, 30 Jun, 30 Sep

0 - Scheduled
X - Actual

STAT
STAT

ACTIVITIES PLANNED	Quarter 1			Quarter 2			Quarter 3			Quarter 4		
	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP
1. Study Phase (Operation & Maintenance Plan)	0		X									
2. Develop System Requirement Document Phase I (Power Plant)	0		0									
3. Develop System Development Plan (Power Plant & Original Headquarters Bldg)	0		0									
4. Develop System Requirement Document (Phase II Original Headquarters Building)			0		0							
5. Implement Phase I (Power Plant)			0				0					
6. Implement Phase II (Original Headquarters Building)				0						0		
7. Syska & Hennessy Interface (Power Plant)			0						0			
8. Implement Phase III (New Building Operation & Maintenance)										0		
9. Implement Syska & Hennessy									0			

Jan 88

Jan 88

~~ADMINISTRATIVE - INTERNAL USE ONLY~~

30 December 1986

Office: OL/PMS
 Objective Statement: Coopers and Lybrand Implementation
 Responsible Officer: Chief, PMS/OL*
 Significant Funding Amount: \$ FY 1987
 Quarter Ending:

O — Scheduled
 X — Actual

STAT

Activities Planned	Quarter 1			Quarter 2			Quarter 3			Quarter 4		
	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP
<u>Action Officer</u>												
Chief, PMS/OL:												
Clarify role				0								
Augment staffing												
Improve contract data				0							0	
Standardize file formats				0								
Improve CONIF data				0								
Establish competition goals				0								
Enhance contract officer role				0								
Emphasize price/performance criteria				0								
Improve acquisition planning											0	
Obtain pricing expertise											0	
Chief, PD/OL:												
Realign six teams				0								
Expand team authority												
Consolidate two teams								0				
Establish two teams								0				
Add settlement and review functions				0				0				
Chief, PMS/DS&T:												
Expand team authority								0				
Add settlement and review functions				0								
Chief, CS/OD&E/DS&T:												
Add settlement and review functions				0								
Reduce letter contracts				0								
Chief, L&PLD/OGC:												
Define legal authorities				0								

MBO4

GROUP B

~~SECRET~~
DIRECTORATE LEVEL

Office: ODA/OL/P&PD
 Objective Statement: IMPLEMENT COMPUTER TO PLATE CONCEPT OF DIGITAL PREPRESS SYSTEM
 Responsible Officer: [REDACTED]
 Significant Funding Amount: [REDACTED] FY 87
 Quarter Ending: [REDACTED]

U Scheduled
 X Actual

25X1
 25A1

ACTION PLANNED	Quarter 1			Quarter 2			Quarter 3			Quarter 4		
	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP
1. DETERMINE CURRENT STATUS OF DIGITAL PREPRESS WITH REGARD TO HARDWARE/SOFTWARE DEFICIENCIES.			U									
2. CONDUCT SEARCH FOR AVAILABLE PRODUCTS TO CORRECT DEFICIENCIES.				U								
3. DETERMINE PRODUCTION CAPABILITIES OF CURRENT SYSTEM VERSUS PRODUCTION REQUIREMENTS.							U					
4. SCHEDULE TASKS TO TAKE ADVANTAGE OF SYSTEM CAPABILITIES.									U			
5. DETERMINE ADDITIONAL SYSTEM REQUIREMENTS.										U		

Page Denied

Level of Objective: X Directorate, Office, Division/Staff

Office: Procurement Division, OL
 Title of Objective: Restructure Procurement Organization To Implement Changes Recommended by Coopers & Lybrand and Accepted by Agency Management
 Responsible Officer: C/PD/OL
 Significant Funding Amount: \$ FY 87
 0 - Scheduled
 FY beginning 1 Oct or Quarter Ending 31 Dec, 31 Mar, 30 Jun, 30 Sep X - Actual

STAT

ACTIVITIES PLANNED	Quarter 1			Quarter 2			Quarter 3			Quarter 4		
	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP
Complete Review of Procurement Division Workload			0									
Decide Nature of Procurement Actions To Be Processed by External Teams			0									
Prepare New Procurement Charters For Teams				0								
Prepare Charter for OL Internal Teams				0								
Advise Components of Staffing Requirements					0							
Complete Assignment of Personnel					0							

Directorate Level

Office: OL/P&TS

Objective Statement: Recruit candidates for OL employment in sufficient numbers to insure that office is at ceiling on 30 September 1987

Responsible Officer:

Significant Funding Amount: \$ FY

Quarter Ending:

O — Scheduled

X — Actual

STAT

Activities Planned	Quarter 1			Quarter 2			Quarter 3			Quarter 4		
	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP
Actively recruit and systematically track professional, technical, clerical and wage candidates for eventual EOD in OL. D/L will be briefed regarding in-process and pre-process on a regular basis when in-process priority lists are developed.			OX			0			0			0

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Level of Objective: X Directorate, Office, Division/Staff

Office: RECD
Title of Objective: Unlisted Objective

" "

THE MILESTONE CHART FOR THIS OBJECTIVE IS ON FILE IN OL/IMSS

FOR INFORMATION CONTACT BOB, JOHN, OR MARIE

STAT

~~SECRET~~

OL FIVE-YEAR PLAN, FY 1987-1991 (cont'd)

Distribution:

C/FMD
C/PD
C/P&PD
C/RECD
C/SD
C/NBPO
C/B&FB
C/IMSS
C/PMS
C/P&TS
C/SS

SECRET

D - D/L ACTION
PLAN

~~SECRET~~

29 July 1986

MEMORANDUM FOR: Deputy Director for Administration
Associate Deputy Director for Administration

25X1 FROM:
Director of Logistics

SUBJECT: The Director of Logistics' Action Plan--1986/1988

REFERENCE: Memo for DCI/DDCI from DDA, dated 27 June 1986,
Subject: The DA - An Action Agenda

1. As you are aware, the Office of Logistics (OL) has a very structured MBO and planning process. Although these mechanisms are valuable management vehicles, they are inherently flawed by constantly changing priorities and by the glaring absence of our extensive support to the Agency's more sensitive activities. Taking the lead from the DA Action Agenda, as outlined in reference, I think it might be of mutual benefit for me to posture what I believe to be our priorities over the next two years in order to ensure that we are on the same wave length. For the purpose of this paper, I have divided our efforts into the following categories:

- Group A - Critical
- Group B - Essential
- Group C - Important

25X1

2. The operational activities included in Group A (frequently involving life and death) are, I believe, in alignment with the Agency's overall priorities--our finest logistics efforts are required for the successful achievement of these objectives, all with the same degree of priority:

25X1

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OL 0032-86



~~S E C R E T~~

SUBJECT: The Director of Logistics' Action Plan--1986/1988

3. Within Group B are those activities wherein logistical support is essential but the significance of these activities are clearly several degrees less than those within Group A:

25X1

c. facility management activities involving the consolidation of Agency holdings by 1989/90 to eight compounds, as outlined in reference;

d. the New Building construction project;

e. the successful execution of the Integrated Logistics Support Plan covering the smooth transition into the Headquarters compound; and,

25X1

4. Group C encompasses objectives that pertain to sustaining and improving essential OL mission capabilities. While these activities are important, they are clearly less significant than those listed above. The objectives are less time critical, and our resources devoted to them can be adjusted with respect to both time and allocations:

a. the implementation of the Coopers and Lybrand Report;

b. the review and revamping of ADP support within OL;

c. CLAS;

d. strengthening relationships with GSA and the Focal Point systems;

e. clarifying FOCI;

25X1

~~S E C R E T~~

S E C R E T

SUBJECT: The Director of Logistics' Action Plan--1986/1988

h. the reduction and/or elimination of nonessential logistics activities;

i. the expansion of P&PD; and,

j. the pursuit of our "image program," both within and outside OL.

5. It is ironic that a large share of our manpower resources are devoted to the objectives contained in Groups B and C--those areas in which we will take the most "hits" from our customers. While we will obviously attempt to do our best in all of the activities in these two groups, we are prepared to take some "hits" in these areas for the sake of those activities in Group A.

6. Overriding all of the above, is our emphasis on OL employees. In this regard, I intend to continue the fine efforts initiated by my predecessor with respect to personnel management, as orchestrated by the Logistics Career Board and the rotating evaluation/promotion panel system. We will continue with our comprehensive review of all OL training programs to be concluded in the fall of this year. Every effort will be made to pursue our participation in the CT program with both internal and external candidates. We will also enhance the Supply Officer and Contract Officer Internal Training Programs. To the extent feasible, we will cross-train OL personnel so that they are skilled in more than one discipline. (The P&PD "Flying Squad" is an example of our efforts in this regard.) We plan more cross-training with respect to WG employees FMD. Further, we welcome rotational assignments of OL personnel in other components of the DA and beyond. We intend to sustain our recognition of outstanding employees by initiating awards, QSI's, etc. It is my observation that cohesive personnel management has not been exercised over the procurement work force for a number of years--I intend to reverse this trend over the next 12 months. Finally, I intend to establish a meaningful plan for the career development of OL middle/senior managers of the future, both in terms of training and assignments. I will submit this plan to you in detail for approval by the end of this year.

7. After I obtain your concurrence, I intend to share this plan with OL senior managers.

S E C R E T

SUBJECT: The Director of Logistics' Action Plan--1986/1988

CONCUR: *

25X1

[Redacted signature box]

Deputy Director for Administration

8 Aug 1986
Date

* Thoughtful and I believe on target at this point in time. Good paper !!

W

S E C R E T

E - 30 MAR 87
STATUS

MEMORANDUM FOR: Deputy Director for Administration
Associate Deputy Director for Administration

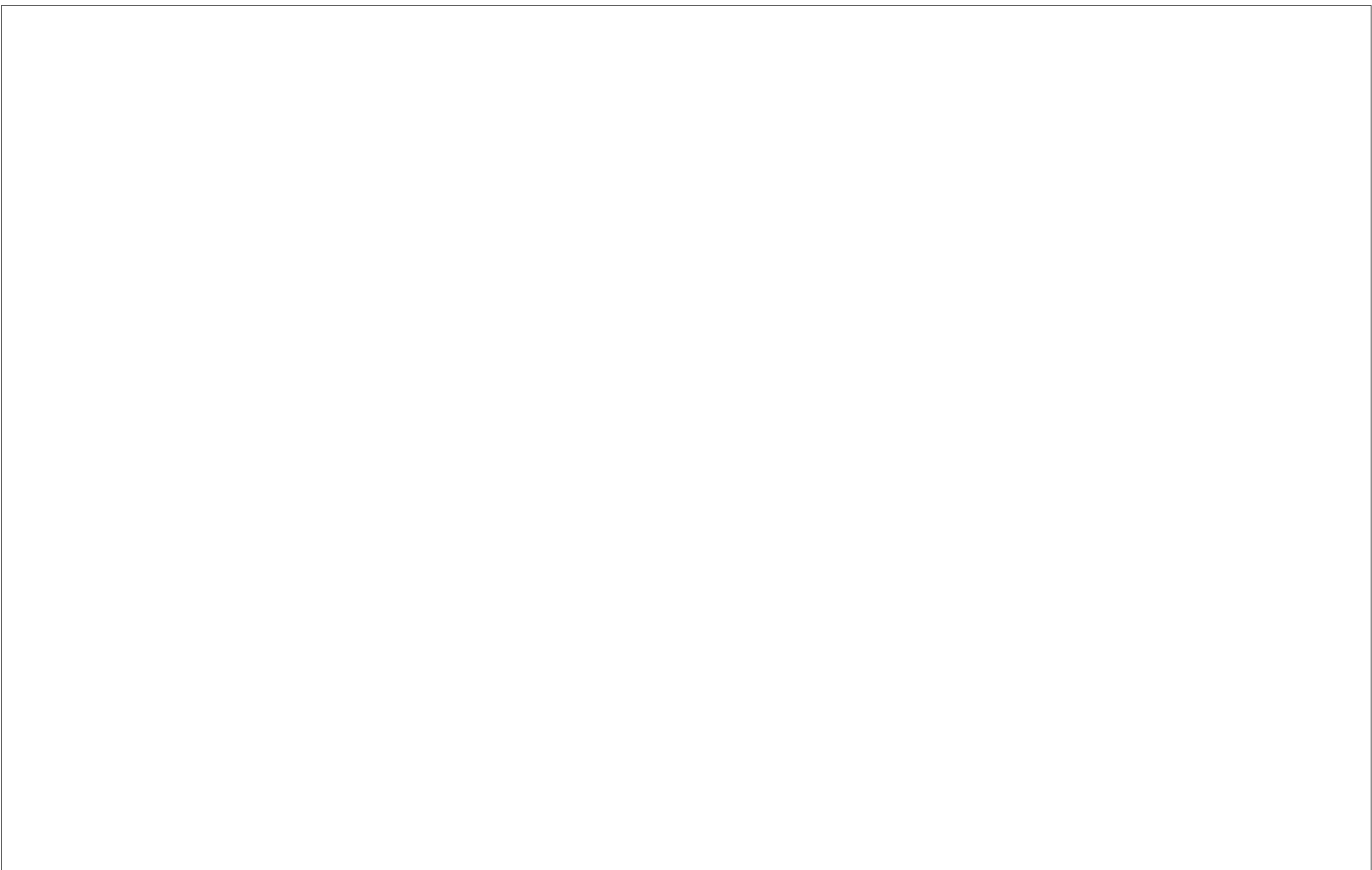
25X1 FROM:
Director of Logistics

SUBJECT: Status Report on the Director of Logistics' Action
Plan 1986/1988

REFERENCE: Memo for DDA and ADDA, dated 29 July 1986,
Subject: The Director of Logistics' Action
Plan--1986/1988

1. Reference memorandum (attached for your convenience) outlined an action plan for the Office of Logistics (OL) to cover the period 1986-1988. This is the first progress report concerning that plan. Beyond the activities addressed in this paper, OL has persisted in providing a high level of "routine" logistics services in the areas of supply, procurement, facilities management, and engineering/real estate as well as printing and photography.

25X1



~~SECRET~~



OL 0008-87

Page Denied

25X1



All of the space issues have a serious adverse impact on our move into the Headquarters Compound, all decisions relating to external buildings, the backfill effort, and indeed who is ultimately going into the New Building. To resolve all of these unsettling issues and to put our space planning back on firm ground, taking the new realities into consideration, I have established a Space Task Force within OL headed by [redacted] Within the next two months, this group will be working on an updated space allocation plan for your concurrence.

25X1

d. While we have some snags from time to time relating to the New Building construction project, they are, in my view, no more serious than those encountered on any large construction effort. In short, this effort is pretty much on schedule and at cost (and hopefully below).

e. We are beginning to move out smartly with the execution of our Integrated Logistics Support Plan (ILSP). Given the space frustrations outlined above, however, we can

only go so far. I am pleased with our efforts to date. As we close in on the actual move, we are indeed getting the customers' attention and cooperation. At this point, I do not see any insurmountable problems on the horizon. You have recently heard a detailed briefing on our planning for "Backfill" in the OHB. [redacted] has done an outstanding job; I only hope that senior Agency management can see the wisdom of our recommended course of action.

occurred in this area. I hope to see much more progress in this area during the next three months. We have issued an edict requiring that all personnel assigned to this component take the Ops Familiarization Course, as well as Ops Records I and II. (This mandatory training must also be taken by the folks working on the management of safehouses.)

4. Our objectives in Group C, although less critical than those discussed above, are nonetheless important.

a. We have had [redacted] provide us with their review of our ADP organization and activities. Their report has been distributed to the OL division chiefs for further review and discussions to be held late this month. This action is being undertaken along with our review of the entire OL organizational structure.

b. We have now just about briefed the entire world on the implementation of the Coopers and Lybrand recommendations. Several recommendations have already been implemented (e.g., review of decentralized teams; initiatives toward increased competition, enhanced procurement training, etc.). Now comes the more tedious and difficult part--establishing new teams, increasing delegations to decentralized teams, and reconfiguring Procurement Division).

c. I think you are pretty much up to speed on CLAS. Our commitment to IOC in October 1988 is firm.

d. We have simplified the FOCI process. New procedures have been enacted and seem to be working with Chief of the Industrial Security Staff as Chairman of the FOCI Board and with the Directors of Security and Logistics only involved on an exception basis. I've received no negative vibes with the new procedures.

d. We have a long way to go vis-a-vis strengthening our relationships with GSA and the military. Heavy workloads have hampered our efforts, but we will continue to push on this item.

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g. We simply have not made much progress on the reduction and/or elimination of nonessential logistics tasks. I am especially interested in streamlining the way we do our business. Not much positive results that I can report at this time. If we do not get a better focus on this soon, I am seriously thinking about establishing an office-wide task force to pursue this objective.

h. You know where we stand regarding P&PD's expansion. Going back to Hank's tenure, we have to put more effort in moving totally unclassified work in the film duplication area outside of Headquarters. This is being pursued with vigor!

i. Our image program continues at a fair pace, primarily through the visitations by OL senior officers to all Agency components.

5. Our most important goal which exceeds all of the above, is to make the Logistics Career Service the best in the Agency. Toward this end, a substantial amount of time and effort is being expended by the Logistics Career Board and our evaluation panels. Our comprehensive review of training pertaining to Logistics careerists is in its final stages--new courses are being closely

monitored, and a training catalogue for OL should be published in a matter of weeks. This initiative will require constant attention by our training officer. The OL Mid-Career course has been expanded beyond wage-grade employees--a very successful, worthwhile effort. We have just about finished our individual interviews with all GS-14 and GS-15 officers as the first step toward constructing a realistic succession plan which will be submitted to you in about three months. We have taken advantage of rotational assignments elsewhere in the DA and the Agency; we need more opportunities, especially at the SIS and GS-15 level. We also need to place more mid-level and senior officers in senior schools. A cohesive procurement subcareer service is starting to take shape--we still have a way to go. We have very viable, sustained training programs for Supply, Procurement, etc., and we continue our heavy participation in the CT Program. The Supply Officer and Procurement Officer Intern Programs have been revamped. The Logistics Management Development Program needs more publicity. We are selecting more individuals for full-time academic sponsorship.

With all of the above efforts, we still have some frustrations in cross-training of wage-grade personnel and in communicating our concerns and plans for personnel/career management to all levels of OL. In order to improve these communications efforts, we continue to convey the message orally at every opportunity. We will also develop a written message personalized for each OL employee on the order of the statement of pay and benefits package disseminated annually.

Finally, we have what I believe to be a very effective review procedure for all OL employees who are completing their three-year probationary period.

6. As you are aware, we have begun a major effort in reorganizing OL--to do this right, I need several more months of deliberation before arriving at an organizational structure which will take us through the 1990's. And it will probably take about a year to implement this comprehensive change.

7. In the immediate future, we are embarking on some new initiatives concerning an update of the Agency's space planning; a proposed space requirement validation procedure; and possible real

estate contract reviews by the Agency Contract Review Board. I am available to discuss any of the above items with you in detail, at your convenience.

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