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TO : Director of Training

DATE: 15 May 1951

FROM : William J. Morgan

SUBJECT: Report and recommendations dated 19 April 1951 by [redacted] consultant: and cover memo on this report dated 25 April 1951 by [redacted] addressed to Director of Training.

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1. In compliance with your request I have the following comments to make concerning [redacted] report:

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Paragraph 1, b: "...assessment...enjoys only vague approval from above and general non-acceptance from below."

The Assessment Unit which resigned in 1948 was overworked; staffed by a number of academically-minded psychologists. For the most part, however, they did good work but suffered poor public relations.

Prior to the activation of the present Assessment Unit*, the Deputy Chief, TRS, prepared a detailed report outlining the conditions for effective assessment programs. Very few of these conditions were bought by the Agency at the time; many of them have been granted since 1949; a few are still lacking. But, for the most part, I would say that the present Assessment Unit enjoys much better public relations than the last one. Its staff members have had military experience; most of them are qualified and practical psychologists; some of them have received instruction on assessment. Many staff and division chiefs in OSO and OPC have repeatedly stressed the value of assessment and they have, time and again, requested more and more services. I was under the impression that they were very cordial to the work and to the staff members of Assessment. Of course, there are always dissenters: Mediocre persons who want mediocre men around them; ambitious empire-builders who hire on the basis of selfish, personal loyalty rather than Agency loyalty. To the best of my knowledge, Admiral Hillenkoeter, Mr. Lyle Shannon, Mr. William Kelly, Mr. Frank Wisner, and Colonel Robert Schow have all been in favor of assessment.

The weekly Wednesday conferences with important Agency personnel which were held by the Assessment Staff aided greatly in explaining and selling the purposes and procedures of assessment. More of this needs to be done. There is nothing mysterious about assessment. It is both a practical and scientific approach to aptitude diagnosis. I have found that when it is fully explained, it is readily accepted.

* The present Assessment Unit was activated in May 1949 by Colonel Schow and/ at the request of Mr. Wisner, AD/PC.

Mr. Shannon

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The prestige of the Assessment Staff will rise high as soon as the present staff members have obtained actual operational field experience as Intelligence Officers for at least two years. They were hired with the understanding that this was one of the conditions of their employment. No psychologist, however competent he may be, can hope to achieve insight into intelligence operations without actual job experience in intelligence.

I therefore do not accept as valid the statement which I have quoted. However, I believe there are many ways in which assessment can play a more important role in CIA. I believe that in time these ways will be achieved. Assessment is most effective, for example, if it is an Agency-wide program sponsored directly from the very top of CIA. This is recognized by outstanding management firms, some of which, like RHR of Chicago, refuse to accept an "assessment" contract unless they can first assess the big boss himself, discuss their findings with him, and then work down to the lower echelons progressively. The Chief of Assessment should be answerable to the big boss only, otherwise assessment findings are subject to lack of emphasis and sometimes deliberate misuse. In my opinion assessment is the most important and the most useful managerial tool which the big boss can have.

Second paragraph (not numbered) on page 2: "ASSESSMENT MEANS ADVANCEMENT"

Assessment also means termination. I believe that personnel in this Agency are too sophisticated and intelligent not to realize that assessment is a managerial tool that is to their advantage only when their aptitudes, skills, and attitudes are serving Agency purposes.

Third paragraph (not numbered) on page 2: "Within the Assessment Unit itself there still remains..."

I believe that this observation is well founded. The present assessment psychologists have had no WOSB, SOE/SAB or OSS/assessment experience. Some of them have had no previous clinical experience in psychology. It is constantly necessary to orient their thinking so that they will substitute practical situation tests for psychometric or for paper and pencil approaches. But their attitudes are the natural result of their background and training in psychology--and psychology as a profession has not realized the tremendous value of the assessment concept. When assessment is merely psychometric, it ceases to be assessment. However, there are dozens of situation tests on file with the Assessment Unit and it is up to the psychologists to exploit them to the full and to devise others as they are needed and as time will permit to use them. The Interview, the Stress Interview, the Group Discussion, the Topic Talk, the Lunch Situation, the Communist Briefing are some of the more commonly used situation tests in the two-day assessment program. Situation tests should always be selected in terms of the projected job assignment. As the psychologists obtain intelligence experience, they will find it easier to devise appropriate situation tests for the different CIA field and headquarter assignments. The ideal setup would be to devote one day to straight psychometric and

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two days to situation testing and observation, with the candidates living and working with the staff psychologists in a country house. Such an assessment program has been recommended in the past. It is especially pertinent to field personnel, both OSO and OPC.

Page 2, Paragraph 2a:

I agree. Perhaps the phrase Psychometric Testing would be appropriate for the one-day program.

Page 2, Paragraph 2b:

A psychometric program is only one small part of an assessment program, therefore the suggested redefinition would imply a delineation of function.

Page 3, Paragraph c:

Assessment should always be done in terms of the projected job assignment; it is, therefore, highly individualized. A clerk-steno, GS-5, who is going to serve as a letter-drop, cut-out, or courier for intelligence operations in the Far East may require more assessment time and attention than a Washington Headquarter's report writer. Echelons of assessment are useful as administrative guides but the psychologist, as a physician, must be left professionally free to chase down and solve a problem that is uncovered during assessment; otherwise he can only give a partial psychological diagnosis. Also, the CIA Officer who requests the assessment must feel free to specify the reasons for the referral. "Packaged" assessment programs are always substitutes and advisable only when it is administratively desirable for the sake of production to sacrifice accuracy.

Page 3, Paragraph d:

By all means. All incoming Agency personnel should either be tested or assessed.

Page 3, Paragraph 3: "Requiring that all incoming Agency personnel be assessed for a minimum number of characteristics to include MOTIVATION, EFFECTIVE INTELLIGENCE and PERSONAL INTEGRITY."

It is impossible to assess all incoming Agency personnel for such characteristics, assuming that psychologists are going to be used for such an assessment program. It would be expensive; there are not enough available and qualified psychologists in America for such a mass job. Furthermore, a psychometric (i.e., purely testing) program would not be valid for determining motivation, effective intelligence, and personal integrity. However, I believe that well-trained assessment psychologists, assigned to I&S, working with and training I&S personnel, could devise ways and means of rating the applicant's motivation, effective intelligence, personal integrity and even emotional stability and field adaptability. They would at least provide

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carefully thought out hunches. They would draw their information from what the candidate writes about himself, from what others say about him, from interviews with him, and from the polygraph records. Psychological techniques applied to security screening would yield some valuable assessment data and possibly shorten the time required for clearance.

Page 3, Paragraph f:

First sentence: Why?

Second sentence: Yes. Alcohol was used in SAB/SOE and in OSS/Assessment. The SAB/SOE alcohol test was more natural than the OSS alcohol test. The alcohol test should not, I believe, be used unless the candidates and the psychologists are working and living together in a country house assessment area for three to four days. Otherwise it is just too obvious and artificial.

Page 3, Paragraph g:

Of course. Much has already been done. In quite a few instances CIA has its own norms, tests, psychological questionnaires, rating scales, and other psychological procedures. More needs to be done and Colonel Baird, I understand, plans to use some of the psychological services of the Educational Testing Service for just such purposes.

Page 4, Paragraph h:

Absolutely. Also, we badly need assessment psychologists, operationally trained in intelligence, who speak foreign languages and who can assess prospective agents, agents who are showing signs of stress or disloyalty, and defectors. We should set up a program of assessment teams for satellite and soviet defectors. Members of these teams would receive language training, assessment and TRD training in Washington, and operational training overseas. These teams would use techniques, when relevant, which would not be permissible with Americans, such as drugs, hypnotism, threat, force, and punishment, combined with the polygraph. I have advocated assessment-defector teams for many years. Mr. Harry Rositzke and Mr. Dana Durand of OSO are interested. We have made a small start in that direction with the assessment team assigned to ZRELOPE.

Page 4, Paragraph 3a:

A two-day assessment program is adequate for many different positions in CIA. A four-day assessment program is justifiable in terms of expense if it is carried out in a country house area with emphasis on situation tests and restricted to important Washington Headquarter's personnel (e.g., AD'S, staff, division, and branch chiefs) and personnel scheduled for overseas assignments. The present Assessment Unit would be able to obtain considerably more assessment information about candidates if they had more space in which to work and more clerical and professional-psychological assistance.

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Page 4, Paragraph 3b:

Yes and no. It all depends on how it is done and what the problem happens to be.

Page 5, Paragraph d:

Yes, provided they: (a) are trained and have at least an M. A. degree in psychology and (b) have had at least two years experience on those jobs for which they are assessing candidates.

Page 5, Paragraph 3:

Yes, this should be done whenever there are salvage potentials for CIA purposes. I did not know that it had been discontinued.

[Redacted Signature]

WILLIAM J. MORGAN

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