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MEMORANDUM FOR THE RECORD

SUBJECT: First running of the Advanced Management Program (PPBS)

1. This first running took place from 10 through 15 September at [redacted]. Representatives from all Directorates and Offices of Training and PPB attended. At the beginning the course manager emphasized that this was not a course to provide answers to the Planning problem facing the Agency, and was not a course in the PPB System. It was expected that PPB System would be a portion of the course with [redacted] giving 25X1 a description of the PPB System as it is used by the Agency and then answering questions put by the class. This did not happen. In future runnings of the course this kind of presentation would be an important feature of the course.

2. The training technique used in the course is case problems with team and group competition, and with time used to introduce stress and reality. The philosophy is that planning is a function of communications and planning techniques. The communications side is very similar to the theories taught in the management grid course. Also several portions of the teams and group sessions are patterned after those in the management grid course. In essence the planning philosophy taught is that whatever planning technique used it must fit the situation, i. e., purposeful, crisis, traditional, or entrepreneurial. Techniques of planning such as qualification of data, planning in uncertainty (using utilities, regret calculations, etc.) were described in some detail and there were planning problems using these techniques. Lectures during the sessions covered the techniques and philosophies being used by private industry to cope with the planning problem.

3. The critique at the end of the course and during it stressed that the "communications" aspect could be dropped because it drew attention away from planning. Also questioned by all but one student was the value of the exercises in quantification of data and the theories for planning in uncertainty. There were many traditionalists in the groups who did not know one end of a statistic from another and could not cope with the simplest data manipulation techniques. TV lectures were used in some portions and

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these left much to be desired. The case problems used were "real enough" although some of the exercises in planning theory and communications theory were felt to be too academic. There was still work to be done with the case problem exercises in order to emphasize the planning function and decrease emphasis on the communications theory.

4. There was one article on the PPB System in the course, and one test on this. What is vitally needed in the course is further information on the System and more time allocated in the course^{it} as the pattern of planning into which Agency planning must gear itself. Admittedly the persons attending were highly skeptical of the PPB System and for that matter any planning system. It is surprising to find so many officers who are involved in some features of the planning process so close-minded about any planning technique or theory that would change their traditional attitudes toward planning (or lack of planning).

5. A comment on atmosphere is in order. It was clear from the comments by those who took the course that the PPB System must be sold to them. Not only do they not understand the system and reject it out of ignorance, they are defensive and afraid of those who are trying to bring the system into the Agency (O/PPB). This is not at all unusual in the Agency but it does indicate a need for better "public relations work."

6. There will be another trial running of the course in the next couple of weeks. The first formal running will be sometime in October. We were promised a copy of the course outline when it is finally worked out. I feel confident that it will be a good course and will do much, over the long term, to bring some coherence to Agency planning.

7. In summary then, the strong features of the course were the case problems which were real situations that the Agency faced or is facing (ADP problem). They gave the group real opportunities in planning exercises. Another strong feature of the course is that it gave you the means (to use or not to use) to look at planning systematically (the planning model). The interpersonal communications part took on too much emphasis and led to a replay of management grid games between players and teams. The greatest weakness in the course now is the little time and attention given to PPBS. Even if it were allocated the morning session, as planned, it would be too little. They also need more material on the PPBS such as the 68-2 and other materials. It is worth noting both as a weakness and a strength the intensiveness of the course. It runs through three sessions daily, the last ending about 11 p.m. Also the case problem technique and

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team competition can be considered a strength and a weakness depending on an individual's reaction to these techniques. The worst weakness, in my eyes, was the final self-criticism and group criticism session at which time you were supposed to get back feedback which would help improve your planning skills. Since communication styles were easier to deal with much of this session dealt with your style of communication, or lack of, and personality traits. This kind of session is an interesting experience but its usefulness as a teaching technique in the planning course is questionable. Another strong feature of the course was the exposure to the planning techniques now being used in industry. This gives the student something to measure the Agency and himself against.



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Remarks: You may be interested in reading [redacted] comments on the first running of the PPB course. It was held last week on a trial basis at ISO. <i>This is very interesting. I want to make sure we do everything we can to make this a good course - first rate.</i>			
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