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MEMORANDUM FOR: Acting Director of Training
INFORMATION : Deputy Director for Support
SUBJECT : CIA Records Management Training Program

1. In elaboration of our discussion of 2 February concerning our proposal to have a CIA Records Management Training Program initiated, we have expanded upon the overall concept and objectives and have provided further details on the sessions, audiences, subject matter, and resources. As I am sure is obvious to you, a program of this size requires considerable refinement and coordination. We feel that this paper moves us a step toward implementation but we appreciate that there is much more that must be done before the course segments can begin.

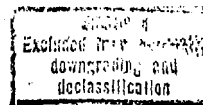
2. We believe three types of records management education are required in the Agency. We propose that:

A. Senior management officials receive concise briefings with the objective of explaining what records management is and, more importantly, what benefits they can expect from having active records management programs in their components. The Office of Training role in presenting such briefings should be minimal, if any. From our point of view it is apparent that Agency management does not fully support an active records management program because managers are not yet aware or convinced of the benefits to be derived from the program.

B. Brief records management presentations be included in selected existing OTR courses.

C. Special workshop-type courses be developed and presented for those personnel closely involved in the Agency's administrative and operational paperwork procedures.

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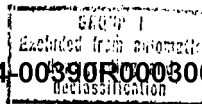
3. The Support Services Staff is prepared to initiate the first phase of this program with a pilot records briefing of the Support Directorate Office Heads, to take place immediately after a DD/S Staff meeting. This will be discussed with the DD/S in the very near future. Assuming general acceptance here we would seek to present similar briefings to senior officials in other Directorates and operating components. These briefings would be about 30 to 40 minutes on the "what and why" of records management with another ten minutes or so for questions. (Please see Tab A for audience sizes and frequency.) The initial senior-level briefings would be conducted by a recognized authority. We believe [redacted] the former Assistant Archivist for Federal Records Management, National Archives and Records Service (NARS), is particularly well qualified to conduct these sessions in an interesting and stimulating manner; we have verified his availability.

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4. During various selected OTR courses, and without any major change in the course structure or student requirements, brief presentations could be given as a practical introduction to Agency records systems. These presentations would be tailored to explain procedures and trends related to paperwork operations in the Agency as well as to describe the services available. Such presentations have been well received at the DDS Trends and Highlights Courses these past four years and were included in the Career Training Program a few years ago. We believe these records presentations could be added to such programs, as the Management and Supervision courses, the professional EOD Orientation, the CT Program, the Midcareer Course, possibly the Senior Seminar. Another specially tailored records presentation would be beneficial for trainees in the Clerical Induction, Clerical Orientation, and Administrative Procedures courses. Other courses, such as the CS Records sessions, lend themselves to inclusion of this type presentation of the overall Agency records management program. (Please see Tab A, Section II for our proposed list of selected OTR courses and audiences for such presentations.) We suggest that these brief talks be given by the existing course instructional staffs with materials provided by SSS.

5. The workshop-type records management training we propose is intended to clarify technical details and Agency procedures in such specialized office operations as: forms analysis and design; microfilm systems; correspondence improvement and standards; systems analysis; records facilities; equipment, and supplies; vital records protection; records disposition, and archives identification and preservation. NARS has developed many workshops which they present

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at the National Archives. (They also have established with the American University several institutes and graduate classes in records management and archives administration which we urge career records officers to take.)

6. We have in mind presentation by OTR of eight special records workshop courses, 1 to 3 days long, that focus on specific records activities. We propose to shorten three of the workshops to fit our needs. (See Tab A, Section III.) The NARS kits, slides, scripts, and handouts are immediately available at nominal cost. We are free to adapt them for our own in-house presentations and to provide particular Agency emphasis. (See Tab B for brochure of NARS workshops.) We would like to assist in developing these tailored programs. The workshops could be presented in CIA facilities by a NARS specialist if we are unable to provide suitable expertise from the OTR instructors or Agency Records Management Officers.

7. In Tab C we have summarized the essence of our proposal. We have further categorized and quantified the audiences at whom the several elements of this records management training program are directed. We also have shown priorities in which given categories of personnel should take records courses.

8. We also have attached correspondence exchanged between this staff and the DDP Records Management Officer. This typifies the kind of personalized training program which can be used to good advantage for others who are embarking on careers in records management.

9. I shall be most happy to meet with you and/or members of your staff to discuss further this training proposal and to benefit from your views.

[Redacted]
Chief, Support Services Staff

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Attachments

DDS/SSS/LRF:rf (18 Feb. 72)

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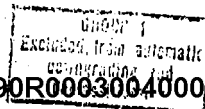
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Approved For Release 2002/05/06 : CIA-RDP74-00390R000300400008-3

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TAB A

RECORDS MANAGEMENT TRAINING PROGRAM

Sessions and Audience Estimates

1. BRIEFINGS AND ORIENTATIONS:

a. Senior Executive Briefings:

For Senior Officers in the Office of the Director, Offices of Deputy Directors, and Heads of Independent Offices. We propose that these sessions be conducted by a special consultant to the Agency who will describe the benefits which the CIA may derive from a more active records program.

We anticipate two of these briefings, 30-45 minutes each addressing about 20 people in all.

b. Operating Official Briefings:

For Heads and Deputies of Offices, Area Divisions and Senior Staffs, and their Executive Officers. These sessions also are to be given by a consultant who will cover the Agency Records Management Program and the support possible through its active application in Agency components.

We foresee five of these briefings, 46-60 minutes each, with a total audience of some 115 personnel.

c. Component Officer Briefings:

For component officers in the GS-14/16 grade level, including Office Division Chiefs, DDP Branch Chiefs, Senior Support and Administrative Officers. These briefings will be conducted by a consultant or the CIA Records Administration Officer and will be on the Agency Records Program and its potential which component officers may exploit.

We project a need for ten of these briefings, each approximately 1 hour in length, with on the order of 200 persons (total) being briefed.

2. RECORDS MANAGEMENT PRESENTATIONS ADDED TO OTR COURSES:

Total: 150 course offerings per year involving 151 hours of records management presentations.

Regular Training Course Presentations:

<u>Course Title</u>	<u>Frequency</u>	<u>Records Mgt. Presentation</u>	<u>Maximum Registration</u>
a. Admin. Procedures	Monthly	1 hr.	15
b. Fundamentals of Supv & Mgt.	6 per yr.	1 hr.	28
c. Intell. & World Affairs	6 per yr.	1 hr.	50
d. Advanced Mgt. (Planning)	6 per yr.	1 hr.	45
e. Managerial Grid	4 per yr.	1 hr.	45
f. Support Services Trends	6 per yr.	2 hr.	54
g. Senior Seminar		1 hr.	20
h. Mid-career Course	4 per yr.	1 hr.	30
i. Microfilm Seminar	6 per yr.		35
j. ADP Orientation (OCS)	3 per yr.		30
k. Clerical Orientation	weekly	1 hr. (addtl.)	15
l. Clerical Induction	bi-weekly	1 hr. (addtl.)	20

Regular CS Training Course Presentations:

m. Field Finance & Logistics	6 per yr.	1 hr.	15
n. Field Ops. Familiarization	6 per yr.	1 hr.	28
o. CS Records I	11 per yr.		40
p. CS Records II	7 per yr.	1 hr.	30
q. CS Records III	4 per yr.		10
r. Basic Operations	2 per yr.	1 hr.	40

3. NARS COURSES TO BE PRESENTED BY OTR

(Total: 8 workshops requiring 12 days.)

<u>Workshop Title</u>	<u>Time (days)</u>
a. Records Maintenance and Disposition (Shortened)	3
b. Forms and Guide Letters	1
c. Correspondence Management	2
d. Speeding Mail	1
e. Forms Improvement	1
f. Information Retrieval Systems (Shortened)	2
g. Files Improvement (Shortened)	1
h. Records Disposition	1