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STRATEGIC EVALUATION MEMORANDUM #4


Information System
for
Policy Planning

Office of Planning and Evaluation
The White House

November 2, 1981

THE WHITE HOUSE
WASHINGTON

STRATEGIC EVALUATION MEMORANDUM #4

TO: Edwin Meese
FROM: Richard S. Beal 
SUBJECT: Information System for Policy Planning
DATE: November 2, 1981

This Strategic Evaluation Memorandum transmits a report dealing with the information system for policy planning in the Executive Office of the President. The study described in the report was completed May 1, 1981. With the establishment of the Strategic Evaluation Memoranda (SEM) series, it was decided to republish the document as SEM #4.

The report contains an analysis of the major roles, functions, tasks, and information processing needs of the Office of Policy Development and the Office of Planning and Evaluation, an evaluation of existing information processing resources and capabilities, and recommendations for strengthening those capabilities.

The document has served various working purposes since it was completed, and several of the recommendations have been implemented. Other recommendations are holding firm and being pursued.

The Office of Planning and Evaluation will continue to assess and implement improvements in the policy planning function, and will be glad to review them with you at your convenience.

INFORMATION SYSTEM FOR POLICY PLANNING:

GENERAL SYSTEM DESIGN PROPOSAL

Submitted

May 1, 1981

by

the OPD/OPE Information Handling Committee

INFORMATION SYSTEM FOR POLICY PLANNING:

GENERAL SYSTEM DESIGN PROPOSAL

Executive Summary and Decision/Action Items

Proposal: Establish information system to support planning, policy development, and evaluation processes in the Executive Office of the President.

Objectives:

1. Strengthen and support the President in his role as leader, chief executive, and decision maker.
2. Reinforce capacity of White House staff to ensure that planning, policy, and evaluation activities serve the needs and interests of the President.

Approach: Provide modern equipment and systems to OPD and OPE for collecting, processing, and communicating information, and presenting it to key decision makers: the President, senior White House staff, Cabinet, and Cabinet Councils.

Benefits:

1. Reduces burden of administrative matters, e.g.:
 - coordinating Cabinet Council activities
 - scheduling and arranging meetings and appointments
 - typing and retyping letters, memos, papers, etc.
2. Improves means of managing and controlling planning, policy development, and evaluation processes:
 - tracking policy issues, work assignments, deadlines
 - communicating and coordinating within OPD/OPE, with other EOP staffs, and with departments and agencies

Decision/Action Items:

1. Agree with general need for improvements in information handling, communication, and presentation and display capabilities and facilities for OPD and OPE.
2. Approve overall system design concept proposed in the paper (see sections II and III).
3. Approve specific recommendations for system installation and evaluation (see section IV).
4. Allocate funds to implement recommendations (see section IV and separate cost analysis and funding plan).

INFORMATION SYSTEM FOR POLICY PLANNING:

GENERAL SYSTEM DESIGN PROPOSAL

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INFORMATION SYSTEM FOR POLICY PLANNING:

GENERAL SYSTEM DESIGN PROPOSAL

I. INTRODUCTION

BACKGROUND

Shortly after President Reagan assumed office, members of the White House staff expressed interest in improving the information services and resources available to the Executive Office of the President.* Activities ranging from informal discussions to research and analysis were undertaken in response to that interest. For example, at the request of Ron Frankum, Deputy Director of the Office of Policy Development, the Office of Administration initiated a study of the computer support needs of his office and prepared a proposal for an Information Systems Development Pilot Project.

PROJECT COMMITTEE: PURPOSE AND APPROACH

These separate activities were brought together in early March 1981. Richard Beal, Director of the Office of Planning and Evaluation, formed a committee to design an information system that would support Presidential decision making generally, and planning, domestic policy development, and evaluation processes in particular. As the principal organizations involved in those processes, the Office of Policy Development (OPD) and the Office of Planning and Evaluation (OPE) were designated to oversee the work of the committee. Beal directed the committee to prepare a general system design, showing what might be done in the short, medium, and long term, and to present its recommendations by May 1.

* The term Executive Office of the President (EOP) refers to White House staff and offices and other agencies (e.g., the Office of Management and Budget) formally established in the EOP. Most of these staffs and offices are physically located in the West Wing of the White House and in the Old and New Executive Office Buildings.

Members of the project committee are listed in Appendix 1. Committee members interviewed OPD and OPE staff and leadership and technical experts within and outside the Executive Office of the President to define user functions, characteristics, and requirements, and to identify existing capabilities. They also drew from their own collective skills and knowledge, derived from experience in such diverse fields as information, word, and data processing systems; telecommunications and media; management and systems analysis; procurement and administrative management; and technical security.

Committee members individually produced narrative, tabular, and graphic materials summarizing the results of their data collection and analysis work. The committee then synthesized and integrated those materials, reconciling differences and inconsistencies, to produce the general system design proposal which follows.

II. INFORMATION SYSTEM FOR POLICY PLANNING: AN OVERVIEW

CONCEPT

This paper proposes a system design for an Information System for Policy Planning in the Executive Office of the President. The fundamental purpose of the system is to support and strengthen Presidential leadership, management, and decision making. It will achieve this purpose by effecting significant improvements in the information handling and communication activities of White House staff related to planning, policy development, and evaluation.

These improvements are intended to serve the needs and interests of both the incumbent President and the institution of the Presidency. Thus, responsiveness, flexibility, and general utility are essential characteristics of the system. It must be responsive to the unique organization, procedures, and style of the Reagan Administration. It must be adaptable to future, unanticipated needs and changes in technology. And its basic framework (equipment, major applications software, etc.) must be sufficiently flexible and universal in design so that it can be a permanent addition to the overall institutional capacity of the Executive Office of the President.

OBJECTIVES

The general objectives of the Information System for Policy Planning are to increase the accuracy of information handling activities without causing delays; reduce dependence on the costly and slow physical transportation of information; increase the efficiency and effectiveness of individual and organizational communications; improve the quality and use of presentation and display facilities and media; ensure that information and activities to support immediate and long-term decision making are effectively monitored; and serve as a means of recording accomplishments.

The method of achieving these changes must be human in scale and function. When new information handling and communication technology is introduced in the work setting, it must support, rather than disrupt, normal human and organizational behavior and working relationships. New systems and technologies should improve - but cannot replace - the performance of managerial, professional, administrative, and clerical personnel.

The objectives just described could apply to any high-pressure decision making setting. Other objectives must be established to reflect the unique needs and characteristics of the EOP environment. Accordingly, the Information System for Policy Planning must:

- provide immediate help for OPD and OPE in a way which does not foreclose plans and options for mid- and long-range expansion in size, scope, and function;
- fit naturally into the organization, procedures, and style of the planning, policy development, and evaluation environments, entail minimal user training, and otherwise accommodate specific user needs and characteristics;
- conform to existing laws and policies on the procurement, management, and operation of information, word, and data processing systems in the Federal government;
- meet the security and other technical requirements governing the installation of equipment and information systems in the EOP complex;
- be fully coordinated with EOP-wide plans and projects dealing with related matters, such as improvements in physical plant and wiring for communications; and
- support the needs of other EOP organizations, or be compatible in the long run with existing and independently developing systems - e.g., those of the National Security Council, Office of Management and Budget, and White House Offices of Cabinet Administration, Staff Secretary, Legislative Affairs, and Public Liaison.

SCOPE AND TERMINOLOGY

The proposed Information System for Policy Planning can be viewed from three perspectives:

- the governmental processes and operational requirements that it will support;
- the kinds of capabilities that it will provide; and
- the timetable for its implementation.

Planning, policy development, and evaluation are processes which occur at many levels of government activity. They assume special significance, intensity, and urgency at the Presidential level. They are central to the President's effectiveness as a leader, chief executive,

and decision maker. Thus, the immediate goal of the proposed new Information System for Policy Planning is to reinforce and strengthen the capacity of White House staff to ensure that these processes serve the needs and interests of the President.

Planning is the process of determining the policy issues and areas should involve the President, and ensuring that priorities are assigned and strategies are developed to achieve them.

Policy development is the process of identifying and developing positions on the most significant problems and issues requiring the attention of the President and/or the top officials of his Administration. In this paper, policy development refers mainly to domestic, economic, and other policy concerns outside the national security arena. The information systems (as well as the organizational and administrative support apparatus) devoted to national security policy processes are far more advanced and tested than those for domestic policy processes. That deficiency was one of the major reasons for undertaking this project.

Evaluation is the process of measuring and assessing progress and achievement of results in meeting the President's priorities, and the effect of Administration policies and programs on the condition of the nation.

These processes are described in greater detail in section III.

Management and coordination of each of the processes described above require the capability to perform certain types of work operations and activities. This paper focuses on three kinds of capabilities: information processing; communication; and presentation and display of information.

Information processing is the collection of data in different forms, from different sources, and by different means; the transformation of that data through analysis, editing, updating, listing, and the like; and the production of papers, charts, and other materials in some new form.

Communication refers to the receipt, transmission, and discussion of information between and among individuals, staff teams, and offices. In this paper, participants in communication networks and relationships are grouped as follows: internal OPD/OPE; between OPD/OPE and other EOP staffs and offices; between OPD/OPE and departments and agencies; and between OPD/OPE and other participants outside the Executive branch.

Presentation and display - while a subset of "information processing" - warrants separate treatment because of its importance in the EOP environment. In many cases the product or result of information processing must be changed to a different form, sent to a different location, and/or displayed using special media, to facilitate presentation, review, discussion, and decision making.

These system capabilities are described in greater detail in section IV.

Finally, the Information System for Policy Planning (ISPP) can be described in terms of the recommended schedule for its implementation. Each of the capabilities described above are, of course, available in some form now, and will continue to be available in the future. As ISPP is developed and implemented, these system capabilities will be improved through the gradual introduction of more advanced technology. Following a transition period, three phases are envisioned.

A transition period, required for detailed system development, implementation, and training, would cover the period from approval of the general systems design (expected in early May 1981) through June 30, 1981.

Phase I covers the initial operation and evaluation of the system, from July 1 to September 30, 1981.

Phase II covers the medium term improvements in the system in FY 1982 (October 1, 1981 to September 30, 1982).

Phase III covers the long-term improvements in the system in FY 1983 (October 1, 1982 to September 30, 1983).

The timetable and plan for installing ISPP are described in greater detail in sections IV and VI.

III. USERS AND NEEDS

This section describes the users and needs that must be satisfied by the Information System for Policy Planning. It is based largely on the analysis of functions, tasks, and corresponding information handling and communication requirements provided in Appendix 2.

While the President, the Cabinet, and senior White House advisors will be the major beneficiaries of ISPP, OPD and OPE staff members will be its heaviest users on a day-to-day basis. Therefore, the major functions and tasks of OPD and OPE are identified in the first part of this section. General system requirements are presented in the second part. These include the major capabilities that must be provided; special needs and characteristics of the user environment that must be addressed; and the organizational structure and internal and external networks that must be supported by the system. The third part describes potential system applications that could help improve the planning, policy development, and evaluation processes.

FUNCTIONS AND TASKS OF OPD AND OPE

Planning

OPE has responsibility for strategic planning for the President. This includes determining the policy issues and areas that should involve the President, and ensuring that priorities are assigned and strategies are developed to achieve them.

The planning process helps set the agenda for the President and his senior staff within the Administration. The President's strategic plan must be adjusted regularly to reflect the emergence of new national policy issues, due to changing events and conditions and to the constant pressure from a multitude of sources for shifts in emphasis and approach.

OPE tasks in support of the strategic planning process include:

- designing the scope and framework of the President's strategic plan;
- developing procedures and controls for the preparation and use of the plan;

- coordinating the determination of policy and program priorities and expected outcomes, and the preparation of descriptions, analyses, and implementation strategies for inclusion in the plan;
- presenting, explaining, and disseminating appropriate plan contents to senior staff, the Cabinet, and the President; and
- maintaining and updating the plan.

Policy Development

Of the governmental processes to be encompassed by ISPP, policy development is the most complex and greatest consumer of EOP staff resources. Policy development is the process of identifying and developing positions on the most significant problems and issues requiring the attention of the President and the top officials of his Administration.

OPD is the key Presidential staff arm involved in this process. Its responsibilities can be grouped into two major categories: administrative and management assistance for Cabinet Councils; and policy identification, development, coordination, and tracking.

A large part of the policy development process occurs in the context of the five Cabinet Councils created on February 26, 1981. In his March 11, 1981 Memorandum to the Cabinet, President Reagan described the Councils as a "means for deliberate consideration of major policy issues which affect the interests of more than one department or agency." Cabinet Councils are subgroups of the Cabinet and are chaired by the President. Each Council has a designated Chairman pro tempore who directs the Council and chairs sessions when the President is not in attendance. Membership consists of from six to nine Secretaries of Cabinet departments and heads of Cabinet-level EOP offices. The Vice President, Counsellor to the President, and Chief of Staff serve as ex officio members of each Cabinet Council.

OPD, working closely with the Office of Cabinet Administration, is responsible for coordinating the activities of the Cabinet Councils. Four to six OPD staff members have been assigned to support each Council. Typically, they sit in close physical proximity to one another and occupy the following kinds of positions:

- an Executive Secretary who attends all Council meetings and serves as leader of the OPD/Cabinet Council staff team;

- two professional staff members, one of whom serves as the OPD representative to the Council Secretariat, which is composed of representatives of the member departments and is designed to support and assist the Council; and
- two research assistants, administrative assistants, and clerical personnel.

OPD has an operational responsibility for providing administrative support to the Cabinet Councils. That responsibility involves such tasks and activities as:

- scheduling and coordinating meetings;
- preparing and distributing agendas, papers, and presentation materials for meetings;
- preparing minutes and recording and communicating Council decisions; and
- tracking action items, work assignments, and deadlines.

OPD also has a substantive responsibility for the coordination of policy development, both within and outside the Cabinet Council structure. Cabinet Councils are organized to deal with the following broad areas of interdepartmental concern: Economic Affairs, Human Resources, Commerce and Trade, Natural Resources and Environment, and Food and Agriculture.

Many policy issues may not fit neatly within this framework. Those which have broad or government-wide application may be raised in meetings of the full Cabinet. Examples would include regulatory, budget, legal, and management policies and federalism and intergovernmental affairs. In some cases OPD staff members are responsible for overseeing one or more of these important cross-cutting issues. Other matters, involving a single department, or affecting independent and regulatory agencies not represented on any Cabinet Council, may require treatment outside the Cabinet or any single Cabinet Council.

Regardless of the specific organizational apparatus used for policy development, the tasks and activities of OPD staff are basically the same. Following is a generic and highly simplified description of the policy process, divided into its major elements and phases.

Develop networks and information resources. In addition to the President and his immediate White House and EOP staffs, major participants in the policy process include Executive branch departments and agencies, Congress, Republican Party officials, State and local governments, clientele and interest groups, the private sector, universities and research foundations, the media, and the general public. In many cases, responsibility for main-

taining direct relationships with these institutions, groups, and individuals is assigned to other EOP offices. In coordination with these offices, OPD must build networks with outside resources to develop a reservoir of talent, information, and advice, and to obtain "early warning" signals about policy problems, issues, and opportunities which deserve top-level attention.

Screening. Screening, assessing, and validating the mass of information, advice, and pressures for action or decision that descend on the White House is a crucial step in the policy process. Its purpose is to identify those issues warranting attention by the President or his Cabinet. Many initiatives will not meet this test, and therefore must be deflected to more appropriate levels and channels for resolution, such as to individual departments and agencies.

Organizing the work. A work plan - identifying tasks, assignments, and deadlines - is often needed for complex policy issues which pass the screening process.

Analysis. Issue definition, problem diagnosis, and analysis of alternatives are steps that lie at the heart of policy development. OPD staff will need to draw upon the far more extensive resources and expertise available in departments and agencies for much of this analytic work.

Review and consideration. At a number of points in the policy process, the results of defining and analyzing issues, options, and strategies must be summarized and presented to decision makers (e.g., Cabinet Council, Cabinet, senior White House staff, the President) for consideration and guidance.

Decision making. The preparation of recommendations and action items (e.g., legislation, Executive orders, statements, etc.) for approval is the crucial step in policy development. Final decisions by the President may be made in Cabinet Council meetings as well as in meetings of the full Cabinet.

Follow-up. OPD's role does not stop at the decision-making stage. Policy implementation, both overall and for those matters of special interest and priority to the President, must be tracked, coordinated, and evaluated.

Evaluation

Evaluation is the process of measuring and assessing progress and achievement of results in meeting the President's priorities, and the effect of Administration policies and programs on the condition of the nation.

OPE has the lead responsibility for this area. Its tasks and activities include:

- advising and assisting in the definition of expected outcomes in the policy development process;
- appraising the status and achievements of the President's policies and programs contained in the strategic plan;
- coordinating statistical and data processing resources to assure the timely and accurate collection of significant evaluation data; and
- presenting and disseminating evaluation data and results to senior staff, the Cabinet, and the President.

SYSTEM REQUIREMENTS

Major Components

Performance of the functions and tasks described above involves heavy requirements for processing, communicating, and presenting and displaying information. The charts in Appendix 2 show the relevance of each of these requirements to specific tasks of OPD and OPE.

Existing OPD and OPE facilities consist of standard telephone service, nominal and mixed amounts of stand-alone word processing equipment, and an assortment of IBM typewriters. They are not adequate to meet information handling and communication requirements efficiently and effectively. The Information System for Policy Planning is designed to remedy this deficiency. Major components of ISPP are as follows:

The information processing component will meet the information handling needs of the principal user organizations - OPD and OPE - and of their operating units and individual staff members. Those needs include various and sophisticated forms of text preparation, manipulation, and editing; list processing; sorting; maintaining tracking systems; records and files; etc.

The communication component will improve the ease with which information is exchanged and discussed between OPD and OPE staff and leadership and - over time - with other EOP offices and individuals, and with many points outside the EOP. Among the latter are the membership of the Cabinet Councils and their Secretariats; other department and agency officials; and other information resources in and outside government.

The presentation and display component will improve the process of preparing and presenting briefing and visual materials for review, discussion, and action by decision makers - e.g., the Cabinet Councils, the Cabinet, senior White House staff, and the President.

The diagram presented as Table 1 portrays the interaction of these system components in the policy development process. Different levels, degrees, and patterns of interaction, information-sharing, and communication occur between the preparation and presentation phases of policy development. The activities encompassed by the "outside world" bracketed to the left of the diagram are highly interactive and reiterative; the connections are numerous and complex; the messages range from highly formal and structured to informal and unstructured. The activities within the area labelled "White House" are simpler by comparison. Here the media, personalities, schedules, format, and style tend to be more constant and structured.

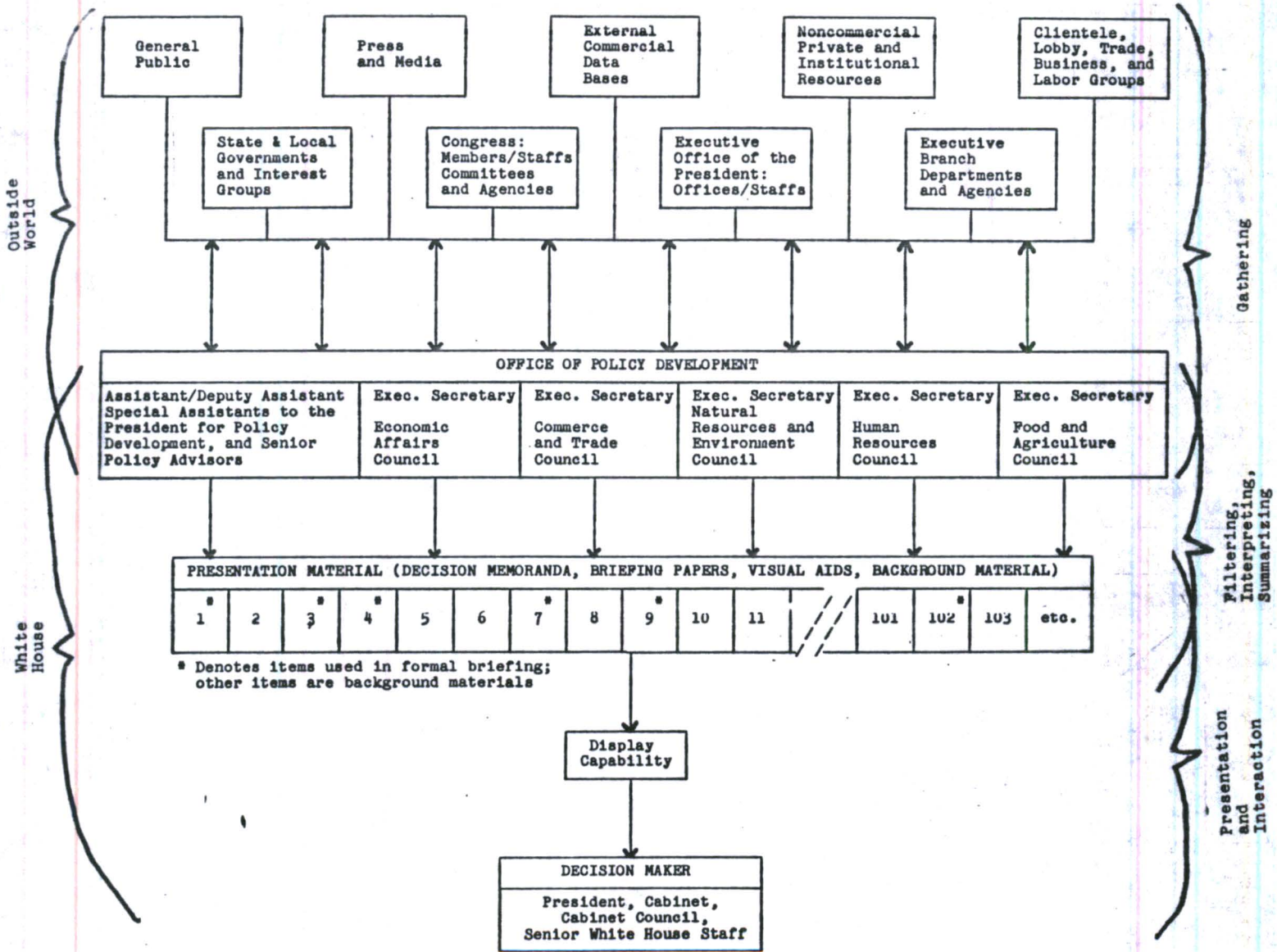
To facilitate and support the policy process while maintaining its integrity and confidentiality, separate but overlapping information handling capabilities are needed. One approach is suggested by the brackets on the right side of the diagram. The first bracket, labelled "Gathering," corresponds to the external networking and information collection elements of the policy process described earlier in this section. The number and range of participants and resources involved in the policy process is enormous.

The "Filtering, Interpreting, and Summarizing" bracket covers the problem and issue screening, definition, analysis, and synthesis elements. The central role of the Cabinet Councils is illustrated in the diagram. This phase entails a high degree of internal and external interaction. Presently, these interactions are supported by several means of communications, including physical movements of paper, telephone conversations, and face-to-face meetings. There are varying levels of sensitivity to these exchanges, from classified and sensitive to open or publicly available. Decisions about level of detail, presentation media, background materials, fall-back options, and the like are made and executed, using a variety of support services available in the Executive Office of the President and the departments and agencies.

The "Presentation and Interaction" bracket covers the delivery and display phase, in which a final product is used in an oral and/or written presentation to decision makers. Background materials may need to be readily available to answer questions and clarify the presentation. The order and content of the material to be presented is often changed up until the last minute, and there is usually far more back-up material than is required. Consequently, the diagram depicts a medium for presentation material which may contain several hundred pages, slide frames, or other items, only a few of which are used in the formal presentation and/or summary document.

TABLE 1

POLICY DEVELOPMENT AND PRESENTATION PROCESS



NOTE: This simplified diagram does not depict the vital roles of other EOP offices, such as OPE, OCA, the Staff Secretary, NSC, OMB, etc.

Special User Needs

Following are several special needs and characteristics of the user environment that have been identified and must be addressed by the Information System for Policy Planning.

1. Multi-dimensional communications. The planning, policy development, and evaluation processes involve a number of hierarchies within which communication, review and comment, and approval must occur. Extremely tight deadlines are the rule rather than the exception. Many more proposals, initiatives, and information items are communicated upward than are returned with comments, guidance, or decisions.

While an imbalance in the vertical flow of information and communication is common to most large organizations, it is exacerbated in the EOP environment by a number of factors. These include the enormous amount of information "in the pipeline" at any given time; distractions caused by crises and the press of other events; the sensitivity and "tightly held" nature of many matters under consideration; and the delays imposed by existing information handling and communication facilities, which require face-to-face or telephone communications, and manual processing and delivery.

ISPP should permit the electronic transmission of messages or documents to a number of offices simultaneously, or to specified, predetermined distribution points, selected by the sender. It should also provide the capability to store messages and documents quickly and with easy retrieval. These features would significantly increase the communication and coordination capabilities of OPD/OPE leadership and staffs.

2. Policy coordination and work assignments. A generic concern of special significance to OPD/OPE is the coordination of the activities of Cabinet Councils and of staff members who might be working on the same or related policy issues at the same time. The ISPP should provide a means of recording and tracking policy issues. It should also permit rapid search, by both subject title and key words, of the agendas and actions of the Cabinet Councils and their Secretariats and related working groups, as well as of other policy development activities. This capability would provide a tool for assigning policy issues and responsibilities to the Councils and individuals most appropriate to handle them. It would also improve user awareness and help prevent redundant or conflicting approaches and activities.
3. Policy management. An important part of policy development is the management, direction, and control of the institutions and staffs involved in the process. The fundamental purpose of policy management is to assure that policy development activities are consistent with the President's strategic plan and overall Administration objectives. ISPP should permit a greater and more rapid

awareness of the planned and completed activities of, for example, the Cabinet Councils and of the staffs supporting them. ISPP should have the analytic and statistical capabilities and the electronic communication features that would allow managers within the policy development process to more closely direct and control activities and monitor results.

4. System use. Any system established to support planning, policy development, and evaluation carries with it the risk that it will not be used sufficiently, or conversely, that it will be used to a greater degree than originally planned. Early experiences of successes or failures may cause either of these conditions to emerge. Use of the system may also be promoted or hindered by separate forces at work in the user environment. Therefore, implementation of ISPP should be phased gradually so that evaluations can be made of the various system capabilities, and a proper rate of development followed. Users will be asked to be diligent in the use of the system during a 90-day test period in order to obtain a valid base of experience, and to ensure that the recommendation to continue, change, or discontinue the system is supported by reliable results.

OPD/OPE Operating Units and Networks

As indicated above, ISPP must support the organization and staffing patterns of OPD and OPE and the need for coordination and communication among and between their respective staffs. The diagram provided as Table 2 shows:

- the current organization and groupings of OPD and OPE leadership and staffs into "operating units" (a term of analytic convenience with no meaning outside the context of this paper);
- the approximate physical locations of those units in the West Wing and the Old Executive Office Building; and
- the proposed network connecting these units.

Each operating unit will require its own information handling facility to prepare and edit documents, maintain files and records, and so forth. At the same time, a significant amount of internal and external communication and information sharing is required.

The diagram in Table 3 illustrates the external network of OPD/OPE communications and relationships. Participants in this network include other EOP offices and staffs, departments and agencies both within and outside the Cabinet Council framework, and others outside the Executive Branch, including Congress and legislative agencies and private and commercial data bases and resources. As the diagram indicates, OPD/OPE has indirect (through other EOP offices) as well as direct relationships with participants in the external network.

TABLE 2

OPD/OPE OPERATING UNITS AND INTERNAL NETWORK

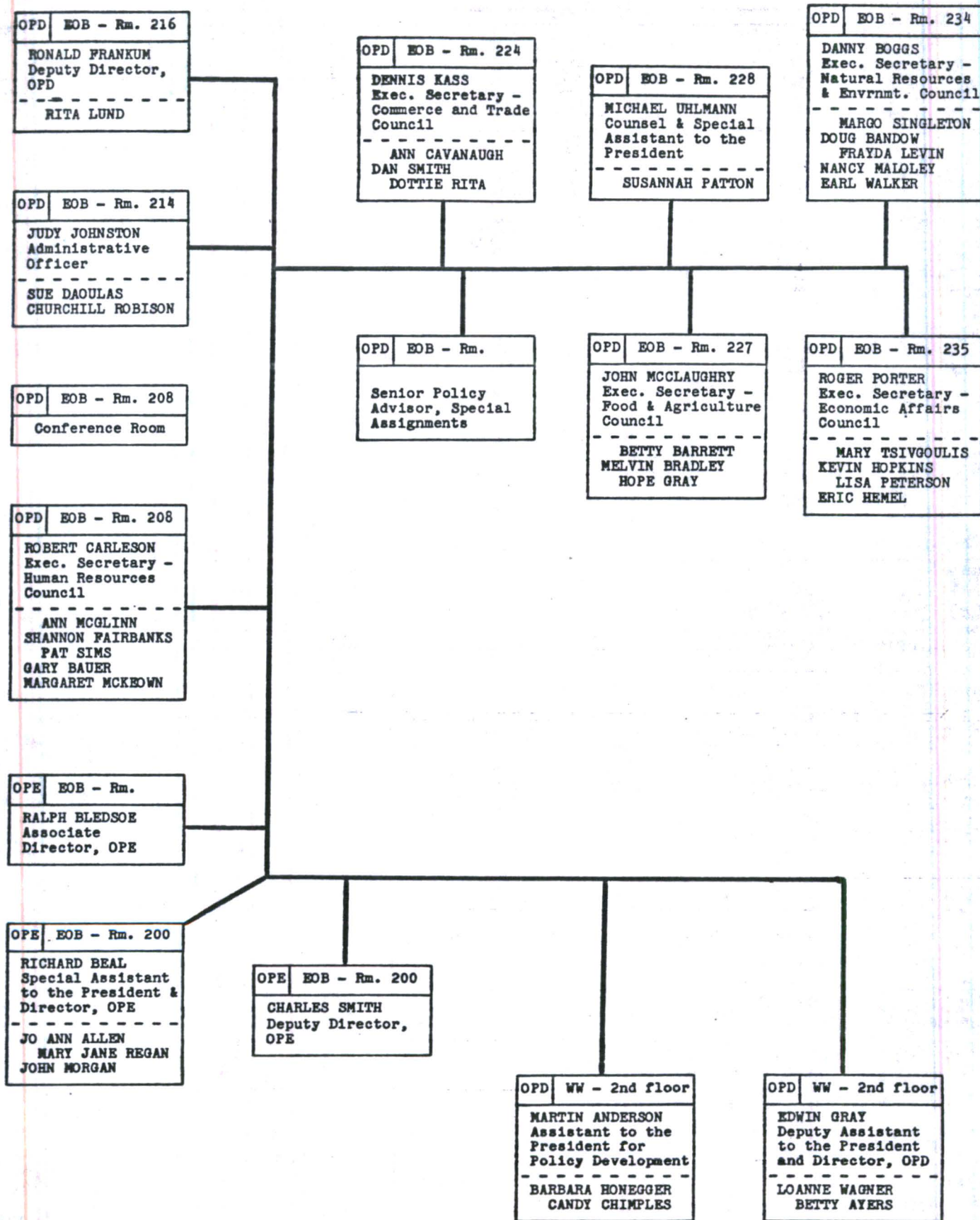
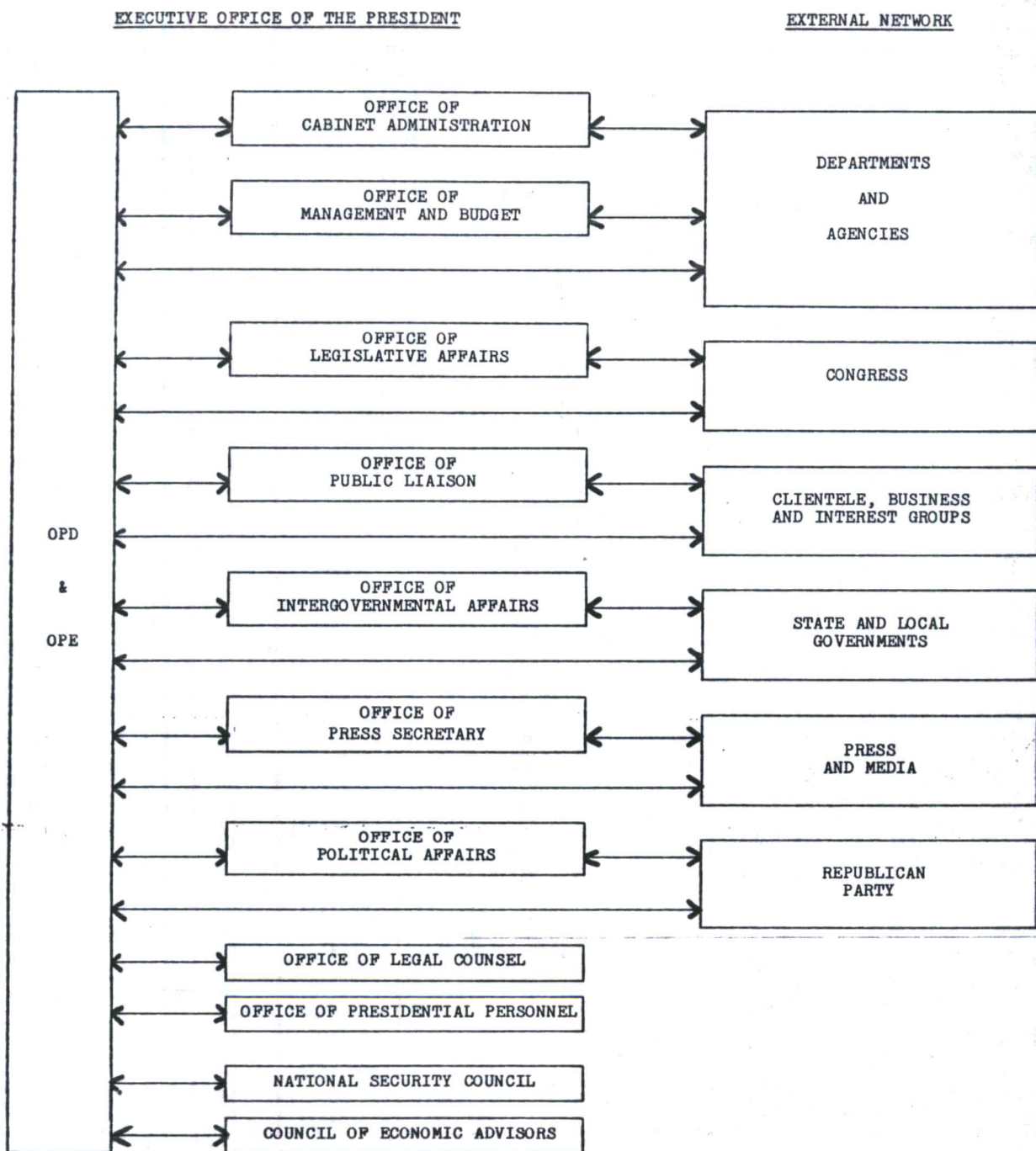


TABLE 3

OPD/OPE EXTERNAL NETWORK



POTENTIAL APPLICATIONS

Based on the users and requirements presented in this paper and in Appendix 2, potential applications of ISPP are summarized below. Each application is briefly described, as follows:

- the purpose of the application;
- an outline of the major types of information - in the form of data, lists, draft and final documents, files and records, etc. - to be included, created, derived, maintained, and/or retrieved under the application; and
- the relevance of each of the three major system capabilities - information processing, communication, and presentation and display - to the application.

1. Provide Administrative Support to Cabinet Councils

Purpose: To simplify the administration of Cabinet Council affairs, including scheduling, coordination, document preparation and distribution, etc.

Information: Includes but not limited to:

- documentation of Council structure and operations
- meeting calendars
- letters and notices to members and other participants
- meeting agendas
- papers and materials (pre-meeting, briefing, handout, etc.)
- meeting minutes and decision records
- lists of work assignments, action items, deadlines

Information processing: OPD Executive Secretaries, working closely with the Office of Cabinet Administration, are responsible for creating, editing, and producing text and materials for the types of information listed above. ISPP must permit special processing of these items to meet specific and unique needs of individual Cabinet Councils, as well as combining common data elements to produce summaries of Council meeting calendars, agendas, activities, etc. for review by OPD/OPE leadership.

Communication: Extensive and recurring communication required with Cabinet Council members, other EOP units, and OPD/OPE operating units. Information must also be delivered back to many of these sources. In addition, summary documents - must be transmitted periodically to OPD/OPE and EOP leadership.

Presentation and display: Much of the information included in this application should be available for display in the offices of OPD/OPE leadership and staff and of Cabinet Council members.

2. Develop Networks and Information Resources

Purpose: To provide a means of "cataloguing" the major participants and resources in the planning, policy development, and evaluation processes, of storing and retrieving basic background information, and of indexing major data bases and sources relevant to selected policy issues corresponding to Cabinet Council areas and to special policy areas currently receiving attention (e.g., federalism, legal policy, etc.).

Information: Examples of useful background materials include:

- departments, agencies, and programs: organization and key personnel; general budget data; text, summaries, and analyses of legislative and other authorities
- Congress: authorization and appropriation committees, subcommittees, members, and key staff members
- clientele, interest, and business groups: names, addresses, key officers, phone numbers, positions
- indices to other information resources (governmental and commercial): names, addresses, types of data resources and capabilities

Information processing: Priority should be given to including data bases which are essential, relatively stable, cannot be obtained quickly from another source, and would not require frequent updating. A heavy one-time effort is required to "load" background information into ISPP. Therefore, this task should be assigned to department and agency staffs to the extent possible.

Communication: To the extent that systems containing this information were maintained by other offices, direct access to those systems would be preferred over duplicating them on ISPP (e.g., OMB for budget data; the White House Office of Legislative Affairs for information on Congress; the White House Office of Public Liaison for information on clientele groups, etc.). Internal information sharing and communication requirements would be sporadic, on an as needed basis.

Presentation and display: Files and documents should be readily accessible by OPD/OPE staff; use in a decision making setting would be less frequent.

3. Develop Policy

Purpose: To facilitate the preparation, editing, review, clearance, and approval of key documents in the policy development process.

Information: Includes such items as working papers, work plans, analyses, option papers, decision memoranda, and action documents.

Information processing: Primarily text preparation and editing, both by OPD and by department and agency staffs.

Communication: ISPP must provide the ability for OPD staff to share draft materials with colleagues and/or decision makers for review, comment, editing, approval, and to consult with and coordinate input and feedback from other EOP offices and staffs and from departments and agencies.

Presentation and display: The capability to present and display information has greatest relevance to this application. Policy documents will need to be prepared and presented to decision makers within OPD offices and meeting rooms in the OEOB and in the West Wing (see illustration of the process in Table 1).

4. Track Policy Positions, Issues, and Implementation

Purpose: To provide accurate, effective, and up-to-date means of recording the President's and Administration's major policy positions, objectives, and commitments; coordinating Cabinet Council and other policy development activities by tracking current and anticipated policy issues and work assignments; and monitoring the implementation of policy decisions.

Information: Using a clearly established and consistent vocabulary of titles and key words, information would be developed and maintained for tracking each of the following types of policy matters:

4A. Policy Positions - a record of established policy objectives and positions, drawing from campaign speeches, the Republican Party Platform, and Presidential messages to Congress, statements, speeches, and press releases.

4B. Policy Issues - a system for tracking current and anticipated policy issues. It might contain the following information:

- Title and synopsis
- Lead responsibilities and assignments
- Chronology of events and actions
- Status, deadlines, and required actions
- Related policy issues

4C. Policy Implementation - a system for tracking and monitoring the implementation of policy decisions. It might contain information on key implementation steps, assignments of responsibility, and deadlines.

Information processing: Maintaining these tracking systems would require diligent input and updating by OPD staff members. The usefulness of these systems will depend largely on their accuracy and currency. Responsibility for maintaining specific parts of the tracking systems would be assigned to specific OPD/OPE staff members or operating units. In large part these assignments will follow the assignment of issues to Cabinet Councils. Listing, sorting, rearranging, and other data processing capabilities would be required to support these tracking systems.

Communication: Inputs from a variety of sources within and outside the EOP - obtained as a part of the daily routine of activities by OPD staff members - will be required for the maintenance of these tracking systems. All OPD/OPE staff members and leadership should be able to query the system to determine the current status of specific policy issues.

Presentation and display: A display capability within OPD/OPE offices will be required to support planning and coordination of OPD/OPE leadership and staff activities.

5. Track Key Policy Events

Purpose: To provide a means for maintaining a calendar of key deadlines driving the strategic planning, policy development, and evaluation processes, and of upcoming events with which ongoing activities should be coordinated.

Information: Would include such items as:

- Cabinet, Cabinet, Council, Secretariat, and other interdepartmental and interagency groups: schedule of meetings, deadlines, reports, etc.
- EOP and individual departments and agencies: calendars of reports, meetings, speeches, etc.
- Congress: calendars for major legislation, testimony, etc.
- Clientele and interest groups: calendars of major meetings and conferences

Information processing: Regular input and maintenance required to assure system accuracy and usefulness.

Communication: In cases where other EOP offices maintain automated systems for part of this information, those systems should be duplicated on ISPP to the extent possible and then processed and synopsized electronically. For schedules and deadlines not captured by other automated systems, they should be screened carefully before entry into ISPP.

Presentation and display: Generally not applicable other than for planning and coordination purpose in internal staff meetings.

6. Develop and Maintain the President's Strategic Plan

Purpose: To support the preparation, updating, handling, and presentation of the President's strategic plan under conditions of absolute security.

Information: President's priority policy areas, Presidential issues and priorities, and time phases.

Information processing: OPE staff is responsible for preparing, editing, and analyzing narrative, graphic, and tabular materials.

Communication: Input to the plan is required primarily from OPD/OPE and other EOP units. Very few copies of plan will be prepared, and sharing of contents will be restricted.

Presentation and display: Limited display of plan contents in special rooms (Room 200, OEOB; Roosevelt and Cabinet Rooms in West Wing).

7. Evaluate Progress, Results, and Achievements

Purpose: To appraise the results and activities associated with various aspects of the strategic plan and to evaluate events, as requested by senior White House staff.

Information: Strategic plan issues and priorities, especially expected outcomes. Results information, both direct and derived.

Information processing: The system must be capable of storing expected outcomes for each Presidential priority issue and activity along with a capability to process actual results for comparative statistical and other graphic representation.

Communication: The system must permit communication of both direct and derived evaluative data to OPD/OPE users, to senior White House staff, and to other EOP and non-EOP users.

Presentation and display: Extensive capability for presentation and display of graphic data in chart, table, graph, map, and other forms is required.

8. Manage, Coordinate, and Control OPD/OPE Activities

Purpose: To enable OPD/OPE leadership to oversee and track the status of staff activities, and to provide timely feedback and direction to staff. Also, to support administrative management of OPD/OPE, including workload, budget, personnel, and facilities planning.

Information: Examples include:

- weekly activities reports
- status of items pending OPD/OPE leadership decision
- staff meeting and other agenda items
- analysis of Cabinet Council activities
- budget and personnel data

Information processing: The system must be capable of storing, processing, and permitting retrieval of schedules, activities, etc., and of performing statistical analyses of this information.

Communication: Generally required only between and among OPD/OPE leadership and staff.

Presentation and display: Some limited statistical displays are required for support to administrative decision making. Other information files should be available for direct display within OPD/OPE offices.

9. Schedule Appointments and Meetings

Purpose: To reduce the unnecessary distractions and wasted time involved in scheduling appointments and meetings for OPD/OPE staffs. The process is a significant drain on resources not only because of the large number and wide range of meetings involved, but also because of the constant changes and rearrangements of calendars and appointments. This application should make it easier not only for OPD/OPE professional staffs to coordinate their activities, but for clerical personnel to support them and leadership to oversee them.

Information: Major types of appointments and meetings requiring attendance by OPD/OPE staffs, including those with the President, the Cabinet, and/or senior White House staff; Cabinet Councils and their Secretariats and working groups; other EOP offices and staff members; internal OPD/OPE staff meetings; and appointments and meetings with representatives of departments and agencies, Congress, and others from outside government.

Information processing: ISPP should provide efficient means of scheduling and maintaining calendars of appointments and meetings. It should also permit periodic assembly and integration of individual schedules into summary or "master" calendars.

Communication. Extensive internal and external communication and coordination is required.

Presentation and display: The information should be readily available for retrieval and review, usually by individual users.

IV. ALTERNATIVES AND RECOMMENDATIONS

PHASE I: JULY 1 - SEPTEMBER 30, 1981

Summary of Alternatives

After assessing the capabilities that exist within the EOP or which could be readily attained within the time and other constraints for Phase I implementation, five alternatives were identified. A detailed description and analysis, including cost elements, of each option is provided in Appendix 3. Following is a summary of that analysis.

1. Transfer the two DEC PDP-8 minicomputers from the Council on Environmental Quality to OPD/OPE.

These machines are readily available, have some software to support OPD/OPE needs, are relatively inexpensive, are easy to learn and use, and have the necessary communications system to link with the EOP's two mainframe computers - IBM 4341's. However, the two DEC minicomputers are limited in terms of capacity, can support only word processing applications, do not have data processing or statistical processing features, do not offer much expansion without procuring additional equipment, and generally are not advanced systems.

2. Provide all users with word processing devices, such as Lexitrons, for individual use.

Twelve Lexitrons are readily available along with other word processing equipment. They are relatively inexpensive over the short term, are very easy to learn and use, and allow flexibility for individual applications. However, linking these devices for communications between users - an essential element of ISPP - would be prohibitively expensive and would require extensive development of special, complex procedures and operator training. This equipment is not advanced and could be easily outdated in a short time. This equipment is limited to word processing and has little or no capability for data processing and special chart and graph creation and display. They would not interface with other EOP systems easily, nor offer much opportunity for expansion.

3. Provide OPD/OPE users with terminals directly connected with the two IBM 4341's.

This would be relatively easy if terminals could be ordered, received, and installed quickly. Communication systems are in, with only minor connection costs required. This would provide a

strong data processing capability for such tasks as correspondence tracking, through use of existing software programs. However, word processing capabilities would be very limited, as the two machines are used at close to 80% of their capacity by other offices, such as OMB. This system is relatively difficult to learn, and the programs now available are slow. Additional programming to support special OPD/OPE applications would be costly.

4. Use the PRIME 750 minicomputer.

The PRIME 750 minicomputer, recently installed in the New Executive Office Building (NEOB), has general purpose software programs that provide an excellent capacity to meet initial OPD/OPE word processing and data processing needs, and necessary communication links are currently being installed for other EOP applications. The initial costs are very low, with operating costs - which begin in FY 82 - rising to a level moderately higher than the other options. The capacity for expansion and ability to link with other EOP systems is a strong feature because of the advanced software programs available. Communication with departments and agencies is best possible under this alternative. It would be backed up by the PRIME 550, which is also installed in the NEOB.

5. Use the PRIME 550 minicomputer.

This equipment has the same advantages as the PRIME 750, but is smaller and can support fewer terminals. With this system the 750 could serve as a backup. The system would have to be shared with an application now being readied for the Vice President.

Recommendations for System Implementation and Evaluation

In view of the user and system requirements described earlier in this paper, and the analysis of alternatives above, it is recommended that option 4 be adopted. Following is a brief summary of the features of the PRIME 750 which directly address the specific needs and requirements of OPD/OPE.

PRIME has an Office Automation System that integrates word processing, management communications, and advanced text management on the PRIME computer system. It is designed for the manager and professional, as well as administrative personnel. The overall goals of the PRIME system are to enable users to increase their productivity; communicate more rapidly; process information more effectively; and enhance decision making for management.

Following are examples of the capabilities that would be provided immediately to OPD/OPE by the PRIME system:

- word processing, enhanced by automatic proof reading and hyphenation;
- sending mail, memos, documents, etc.;
- managing correspondence;
- scheduling meetings and appointments;
- tracking projects;
- filing, maintaining records of, and retrieving information;
- producing manuscripts and documents; and
- performing information and data processing.

Many of the system applications described in section III could be fully or partially supported by software that is immediately available on the PRIME 750. Some custom programming may be required for the rest, e.g., establishing a Policy Issue Tracking System.

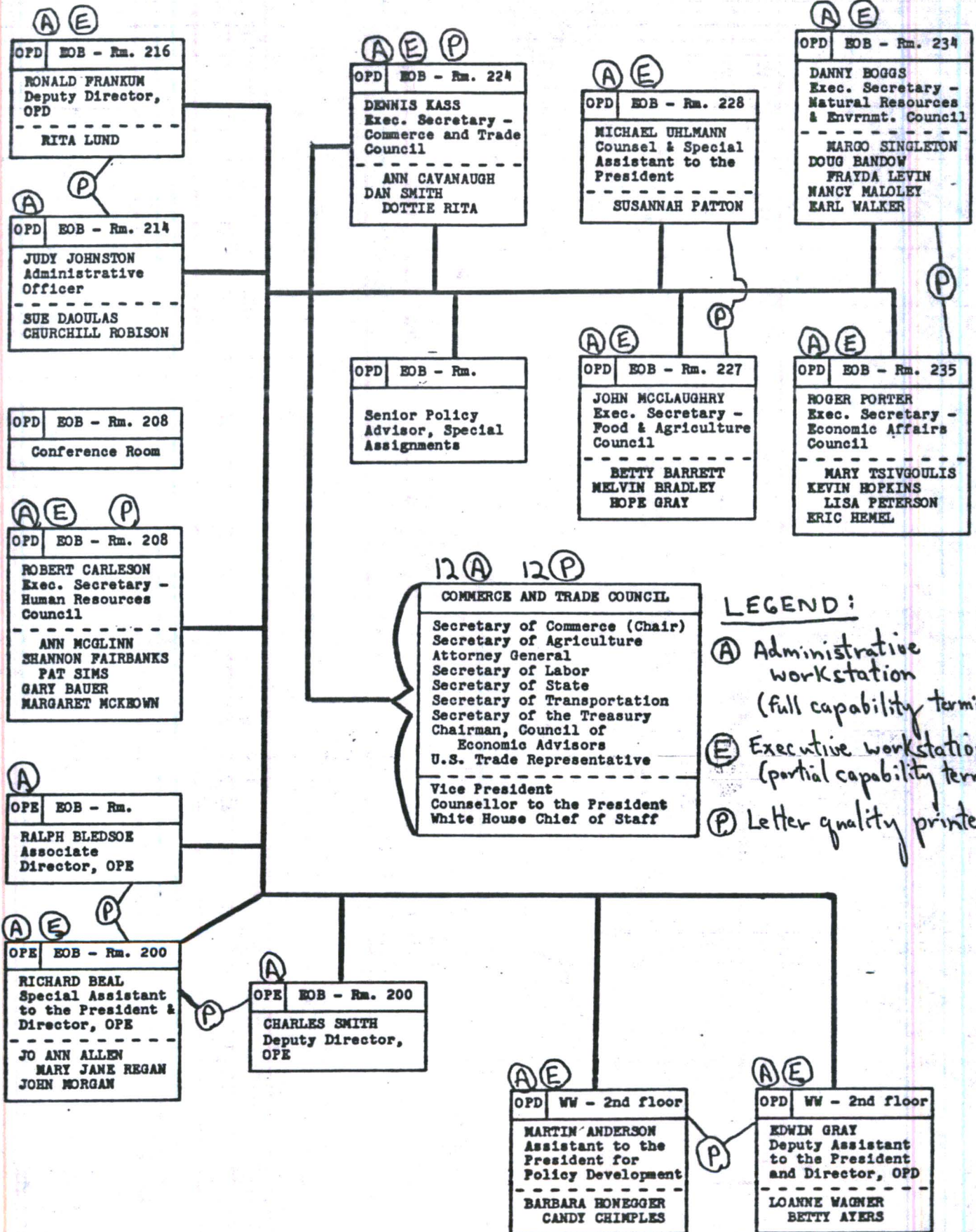
Additional details on the recommended system design, summarizing features and capabilities to be provided by phase, are provided in Appendix 4.

Following are recommended implementation and evaluation steps:

1. OPD/OPE users should be provided with a mix and match of PRIME 750 administrative and executive workstations and letter quality printers, with installation to begin in June 1981. The recommended initial distribution of system workstations is shown in Table 4. Training should be provided during this period.
2. The system should become operational for Phase I on or before June 30, 1981.
3. A 90-day evaluation of the PRIME 750 system should be initiated on June 1, 1981. The evaluation should assess the implementation and utility of the system to meet OPD/OPE current and evolving needs, and result in one of three possible recommendations:
 - discontinue use of the PRIME system at the end of FY 81 (September 30, 1981), and identify and provide other capabilities as soon as possible;
 - continue use of the PRIME system during FY 82 but seek alternative capabilities during that year for implementation in FY 83; or
 - continue use of the PRIME system in FY 82 and seek to enhance its capabilities and expand the scope of the system in FY 83.

TABLE 4

INITIAL DISTRIBUTION OF SYSTEM EQUIPMENT



4. During the 90-day evaluation period, system users should include selected OPD/OPE staff members, selected senior members of White House staff, and the membership of the Commerce and Trade Cabinet Council. These offices would designate persons to be trained for diligent participation in the use and evaluation of the system.
5. OPD/OPE budget allocations should be planned for FY 81 implementation and evaluation, FY 82 system operation, and FY 83 improvements, estimated as follows:
 - FY 81: \$25,000 for communication links
\$48,000 for pre-payment of FY 82 equipment rental
(If it is determined that the PRIME system is not to be continued in FY 82, these funds would be used to obtain equipment in FY 82)
 - FY 82: \$8,000/month for equipment rental
\$12,000 for additional disk storage
 - FY 83: \$15,000/month for equipment rental (evaluation of the system during FY 81 should provide more precise cost figures for FY 83 in time for necessary budget inputs in September 1981)

Note: A detailed cost analysis and funding proposal will be submitted separately.

6. The following task forces should be established to address related system issues:
 - Security Task Force (see section V)
 - Communications Task Force (see section V)
 - Facilities Design Task Force (see Phase II recommendations)

PHASE II: OCTOBER 1, 1981 - SEPTEMBER 30, 1982

The mid- and long-term portions of ISPP are tied to other improvements which are needed to support ISPP, or which would complement it. This part gives early and tentative thoughts as to what some of the resulting capabilities and services might be.

Most of the Phase II changes involve enhancing the communication and display portions of the system. Implementation of the Phase I system design recommendations will provide immediate electronic mail capabilities to handle message and document exchange within OPD/OPE and between OPD and the members of one Cabinet Council. Assuming success of the Phase I experience, a major step in Phase II would be to extend the electronic mail capability to members of the other four Cabinet Councils. Additional expansion - to other Executive agencies not represented on Cabinet Councils - may be contemplated during this

period. However, to accommodate the need to exchange sensitive and classified documents and materials within these communication networks, a limited number of secure facsimile transceivers will probably be required. See section V for additional information on security considerations.

On-line access to services offered by the various Office of Administration computers should be able to begin in Phase II. The White House Information Center (WHIC) should be made a part of this plan, so that requests for research and information can flow to WHIC by electronic mail, and responses can be delivered electronically to user workstations. Another key use would be WHIC personnel performing access to the large variety of external data services on behalf of OPD/OPE personnel who may not have the time or hands-on experience with the service in question to use it.

West Wing Phase II services should focus on delivery of products. Availability of compatible word processing equipment in the West Wing would allow paperless display of documents, by the expedient of physically carrying a disc to a briefing. Simple service for electronic delivery of non-classified documents from the Old Executive Office Building (OEOB) to the West Wing is also practical. Communication details for this and other services are discussed in section V, in the part titled "EOP Communication Network Development."

Phase II should permit the beginnings of video displays in the West Wing and in the OEOB. Two portable facilities are envisioned. Both would be built in the form of a portable rolling cart, properly finished with cabinetry to make them compatible with their surroundings. One would be a standard TV receiver/video tape player combination, for screening tapes on demand, and for screening sensitive or classified material currently being produced for high-level briefings. The second cart would be somewhat larger, and would include the high-resolution display screen and computer terminal needed to drive the Decision Information Display System (DIDS). Both of these carts would be designed to be used in any of the key OEOB or West Wing locations, or - in the case of the TV/tape cart - in the Residence or East Wing. Also during Phase II, the beginning of cable TV feeds of House proceedings and the Cable News Network should occur, if the decision is made to proceed with arrangements proposed by the White House Communication Agency.

A Facilities Design Task Force should be established to plan and monitor the implementation of these improvements.

PHASE III: OCTOBER 1, 1982 - SEPTEMBER 30, 1983

Phase III is necessarily more vague, and somewhat dependent on further assessment of actual users' needs, on major decisions being taken independently, and on the actions of non-EOP organizations. The possibilities include:

- permanent large-screen display facilities for standard and high resolution video in two or more locations in the OEOP;
- multi-channel cable network, to carry 35+ channels of video, secure voice, and multiple low and medium speed data channels; and
- new telephone exchange (electronic switching system), with new services such as call forwarding, conferencing, etc.

The present short-term plan would have been superceded by a new set of short-term improvement goals by that time, and these would be dependent upon and in fact made practical by achievement of the above components of a long-range plan.

V. SPECIAL CONSIDERATIONS AND RELATED EOP PLANS AND PROJECTS

SECURITY

While various aspects of security are being considered during the work of the committee, this section will not attempt to be complete or definitive, but rather to cover several items which require early attention. These items include:

- TEMPEST requirements for word processors and computer terminals;
- Electromagnetic radiation limits for all system components;
- Restrictions on type of information processed; and
- Restrictions on interconnections with existing systems.

A general goal of the security component of this proposal is to assure that all new systems, media, and communications are equal to or more secure than present practice. Another goal is to leave the responsibility for security of information in the same hands as now - usually the individual. Technology, at least at present, offers no easy solution to the well-known problems of security, and especially in situations where a variety of unclassified, sensitive, and classified information is being handled. Consequently, users will continue to bear responsibility for protecting sensitive information.

TEMPEST. Generally speaking, TEMPEST is the name of the procedure used to evaluate and certify the performance of electronic information handling equipment with respect to meeting standards for controlling undesirable electromagnetic radiation. In the EOP, the Secret Service is responsible for such certification, while the White House Communication Agency (WHCA) and other elements of the Department of Defense (DOD) provide guidance and technical information. TEMPEST testing is conducted to assure that equipment installed in the EOP complex does not "broadcast" information beyond the confines of the complex.

Electromagnetic interference. This is a separate concern. Steps should be taken to assure that the level of electrical "noise" generated by electronic equipment, regardless of its information content, does not render measurement of similar radiation by other devices difficult or impossible.

According to a DOD representative, several prominent word processors are not TEMPEST-qualified. And, experience has shown that even if some of a vendor's products qualify, others may not. Identification of specific names and model numbers is required. Companies which produce some word processing equipment which is TEMPEST-qualified are Lexitron, Vydek, Wang, and Xerox. Vendors known to have TEMPEST programs underway for some of their equipment include DEC and IBM.

WHCA feels strongly that the TEMPEST criterion should be required in word processing specifications, but that full compliance can be achieved gradually. The Office of Administration, through which much of the equipment in the EOP complex is procured, is presently working with the Secret Service and WHCA on a TEMPEST requirement which would become standard for EOP procurements.

At least as initially configured, ISPP will not be secure in the sense that, for instance, the NSC system is. Accordingly, no classified information should be centrally filed or communicated on the proposed system. An individual stand-alone word processor could be used to prepare and process classified and highly sensitive documents, such as the President's strategic plan. Care must be taken to assure that the workstation is turned off upon completion of the work, that removable storage media (e.g. floppy disks) are kept in a secure location, and that one-type mylar ribbon cartridges are properly stored and disposed (burn bag). No sensitive communications should be made outside the complex in Phase I or II until secure encrypted communications are available. Conventional media and physical protection will continue to be required in situations where secure, electronic system inter-connection is not presently feasible.

The foregoing suggests steps which must be taken to meet initial security needs. A Security Task Force should be established to plan and monitor improvements. It should coordinate its activities with the Communications Task Force recommended later in this section.

Among the items which should be examined in light of possible mid- and long-range system security requirements are the need for:

- secure facsimile, perhaps compatible with the existing WASHFAX system;
- secure voice, in light of existing services, and the Executive Secure Voice (ESVN) proposal;
- secure video, for West Wing displays outside of the Situation Room; and
- encrypting devices for communication lines, and possibly encrypted data bases.

UPGRADING INFORMATION CENTER SERVICES

OPD/OPE will always depend on external sources of data to be used in conjunction with internally generated information for planning, policy development, and evaluation. Initially and, into Phase II, the outside data base services identified to date (see Appendix 5) as well as others as needed, will be accessed through the White House Information Center (WHIC) staff. Use of these data bases will take three approaches:

- Building of individual or group policy issue profiles to be run by WHIC staff against specific data bases on a regularly scheduled basis to up-date information. As data is identified which matches the profiles, it will be copied to ISPP for further direct use by OPD/OPE staffs (see Appendix 5).
- Direct on-line access to specific data bases in response to an inquiry from an OPD/OPE staff member. Results of these searches may be inserted in ISPP, depending on the requestor's needs.
- Batch profiles searches, retrieval, or analysis by staffs supporting external data bases. Results may be delivered in printed copy generated at the search site or as a remote printer in OPD/OPE. Search results will be keyed to ISPP as needed.

As data from outside data bases is added to ISPP, pointers will be included which direct the user back to the full data base or similar ones for additional information. Pointers will include instructions for accessing, and to the extent possible, search terms to be used.

As use of the outside data bases increases, direct access by OPD/OPE will be set up through existing Office of Administration contracts. Search costs vary by data base but average \$75.00 per connect hour with the exception of DRI and other analytical and modeling systems. Batch searches are much cheaper and are likely to run no more than \$35.00 per hour. As outside data is being accessed and added to ISPP, OPD/OPE will be generating information which becomes a part of ISPP through word processing capabilities or other aspects of the office information support.

In Phase I, communications between OPD and OPE and such other EOP units as the Offices of Cabinet Administration, Staff Secretary, Legislative Affairs, and OMB will be carried out in the traditional manual mode and through the use of briefings using available display capabilities. ISPP will be designed to permit increasing direct, electronic communications capabilities in Phases II and III.

EOP COMMUNICATION NETWORK DEVELOPMENT

Past attempts to rationalize communication systems for the EOP complex have met with little success, and a growing variety of disparate and expensive facilities are in use. This part will address only wireline communication.

Physical pathways in the EOP complex for cable are overcrowded. With a few exceptions among older technologies, spare capacity is not available. Overcrowding exacerbates the security problem, and ad-hoc solutions to it are expensive. With this situation it is quite difficult to meet more users' need better, or to add new services.

Among the present service providers are the White House Communication Agency. WHCA has at least four separate wireline communication systems:

- a coaxial cable network for television signals;
- a separate coaxial network to serve its OEOB computer video display terminals;
- a small telephone network serving the "Signal Board" for secure voice and other special-need voice traffic; and
- the facilities serving the Situation Room.

The Secret Service has at least two networks:

- one of coaxial cable for TV surveillance monitors; and
- an extensive network to support its computer terminals.

The Office of Administration has essentially two networks:

- one small cable net in the NEOB to support computer video display terminals; and
- a complex of multiplexers, termination equipment, and tie lines which connect low and medium speed computer terminals to OA's computers and to a facility for connection to external computer and data base services. This system, provided by TRAN Telecommunications, offers service in the NEOB and the OEOB via tie lines under Pennsylvania Avenue.

The largest and most pervasive network is the telephone system, operated by the Chesapeake and Potomac Telephone Company (C&P). It is based on classic "twisted pair" copper wires which connect telephone equipment to an obsolete crossbar branch exchange switch located under the south court of the OEOB. The growth capacity for this facility is

essentially exhausted. C&P also supplies "twisted pair" tie lines to meet some of the needs of the other networks, using existing multi-pair cables in the complex, running down to 1800 G Street, and under Pennsylvania Avenue to the NEOB and the Jackson Place buildings which abut it.

Under the Phase I system design recommendations, a number of terminals, printers, and storage facilities will be interconnected along the common hallway of the south half of the second floor of the OEOB. There are basically two ways to interconnect these devices, and both assume some shared common point through which communications to other points would run. One way is to use individual lines - either "twisted pair" or small (1/4 inch) cable, between each device and the shared communications facility. Another way is to use a single 1/2 inch cable to follow the path of the hallway, and have each device tapped into it. The latter method is called a "baseband cable bus." The technology is relatively new - about 10 years old, and several organizations sell off-the-shelf components to make the proper connections.

To connect a few of the individual devices to other points, even before a shared communications facility is in place, at least two methods are readily available. One would be to use C&P-provided tie lines with small and inexpensive devices called "line-drivers." This method would be appropriate to serve initial West Wing service needs. To meet other short-term needs, the existing TRAN service provided by OA should be used. Several connections on the second floor of the OEOB are already in place, and a few others could be installed in a week or so. Once a shared communication facility was in place, the TRAN service could continue to be used for communication with the NEOB and the outside world, until the long-range planning process proposed below produces a better solution.

Described sketchily here and in more detail later, mid-term communication improvements would come in other areas such as telephone plant improvement and adding services to the existing cable TV system, such as access to House floor debates (CSPAN) and the Cable News Network. Long-term improvements will probably center around development of broadband cable bus network for the entire complex, to be used for data, video, and secure voice. Such networks are in use or planned for the National Library of Medicine, the National Bureau of Standards, the Central Intelligence Agency, and the House of Representatives.

In order to avoid adding to the problems outlined above, any plan for new or extended service must be done in the context of a long-range planning process. Short-term improvements must be reasonably compatible with long-range plans. For these reasons, creation of a Communications Task Force to prepare detailed technical requirements is recommended in section IV.

POLICY MATTERS

Telecommunications Policy

Before major links are established between and among the Cabinet Councils and other agencies, implications of present telecommunications policy will be examined. In the initial stages, telephone connections in the White House, OEOB and NEOB are the only means by which the various users and sources within the systems can be connected. An exception to this is the TRAN network leading to the outside data bases from the White House Information Center.

Procurement Policy

As a matter of commitment to following procurement policies now in existence, all major procurements will be competitive and will meet the requirements of Federal Procurement Regulations and those of the Office of Federal Procurement Policy. For the most part, the Office of Administration will be writing the contracts and providing contract administration; OPD and OPE will be setting the requirements, serving as project managers on the contracts, and monitoring the progress. The Office of Administration will make the necessary contacts with the General Services Administration and, to the extent necessary, will coordinate with the Secret Service, the White House Communications Agency, and other elements of control in the EOP complex.

Information and Records Policy

ISPP will be designed to fully adhere to the terms of the Privacy and Presidential Records Acts. Special policy requirements for sensitive and classified material will be followed as necessary. Elements of the Federal Paperwork Reduction Act which apply to statistical data or other aspects of policy information handling will be followed to the extent practical.

VI. IMPLEMENTATION PLAN

Approval of General Systems Design (OPD/OPE)

Briefings and decision memoranda must be prepared and presented to senior members of the White House staff, in order to obtain approval of the general system design recommendations contained in this paper. A PRIME terminal (PT 65) and printer should be installed in an OPD office by May 11, and relevant applications prepared, to permit demonstrations, as needed.

Detailed System Design and Applications Development (OPD/OPE)

Based on the potential applications described in section III of this paper - as modified or supplemented by guidance received from decision makers - a plan must be prepared and implemented for developing a detailed system design, including but not limited to the following tasks:

- establish priority applications according to initial use and timetable for expansion in Phase I (e.g., start with basic word processing, appointment scheduling, and calendar maintenance; gradually add tracking systems, data processing, and statistical applications requiring customized programming);
- develop operating procedures (including communications), restrictions, and management controls; and
- structure and design forms, files, and data bases.

Leasing and Funding (OPD; OA)

Prepare leasing arrangements, and make necessary FY 81 budget allocations for rental and maintenance (see Cost Analysis discussion, below).

System Installation (OA)

Tasks required before the system can be installed include preparing the sites for terminals and printers (space, furniture, etc.); preparing technical work orders for GSA electrical work and installation of necessary communication lines (C&P telephone, cable); assuring that the system and equipment meet security requirements (e.g., TEMPEST); physically moving the equipment to designated locations; and conducting acceptance tests.

Orientation and Training (OPD/OPE; OA)

Identify principal and secondary users and arrange schedules for background briefing, orientation, and classroom and onsite training.

Implementation and Evaluation (OPD/OPE; OA)

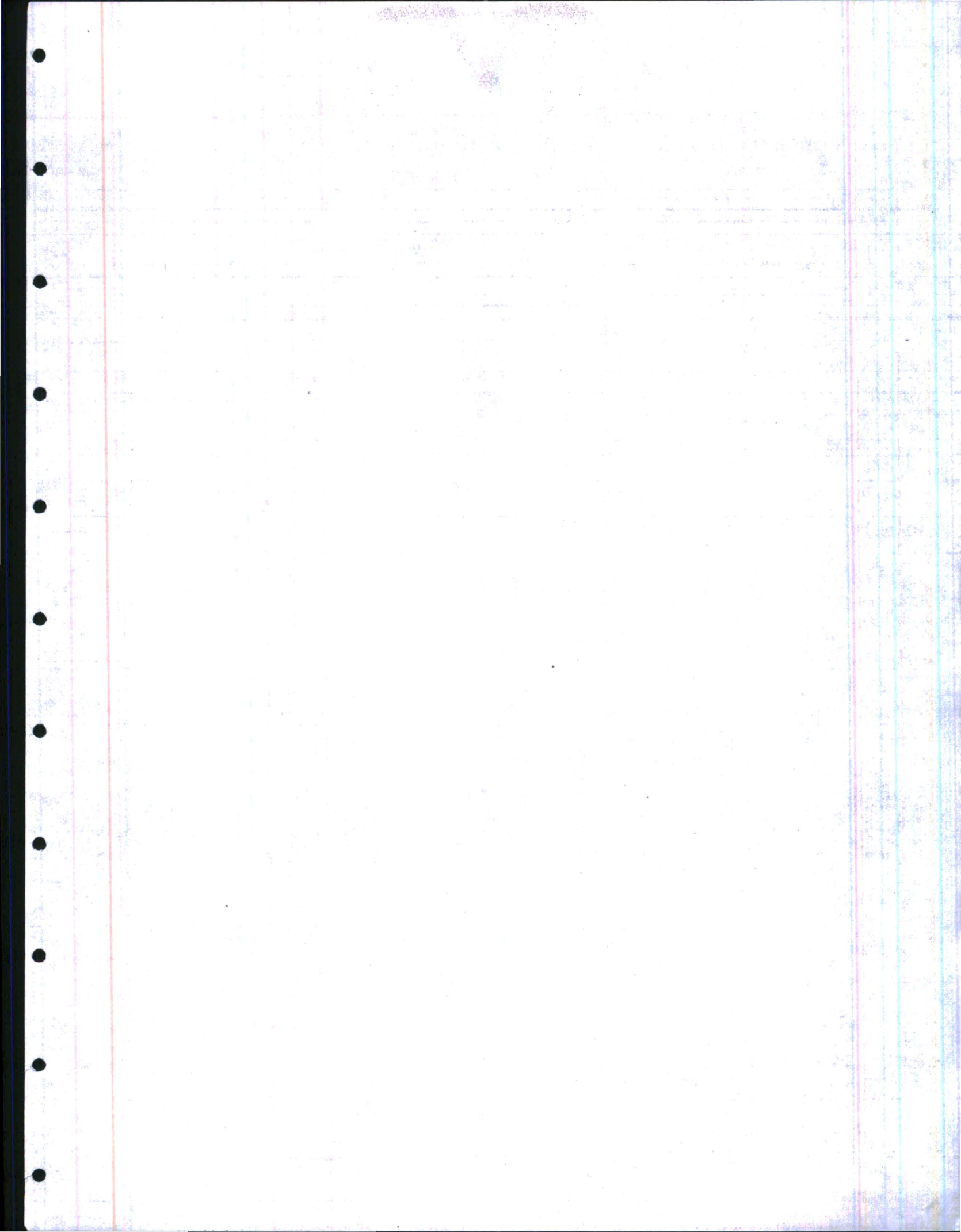
Implement the system, gradually phasing in the applications, add software as necessary, and test and evaluate the system (see evaluation recommendations in section IV).

Related Projects (OPD/OPE; OA)

Establish, coordinate, and monitor task forces on:

- Security
- Communications
- Facilities Design

Test satellite conferencing.



APPENDIX 1

INFORMATION SYSTEM FOR POLICY PLANNING

Project Committee Membership

Bellis, Jonathan	Management Analyst U.S. Office of Personnel Management (detail to the Office of Planning and Evaluation, Executive Office of the President)
Bledsoe, Ralph	Associate Director Office of Planning and Evaluation Executive Office of the President
Kadec, Sarah	Deputy Director Office of Administration Executive Office of the President
Pinelli, Madeline	Branch Chief - Special Studies Information Systems Development Division Office of Administration Executive Office of the President
McManis, David	National Security Agency Department of Defense
Zimmerman, Edward	Deputy Administrator National Telecommunications and Information Administration Department of Commerce (consultant with the Office of Planning and Evaluation, Executive Office of the President)

APPENDIX 2

INFORMATION SYSTEM FOR POLICY PLANNING

OPD/OPE Information and Communication Requirements

POLICY PLANNING INFORMATION SYSTEM: OPD/OPE INFORMATION AND COMMUNICATION REQUIREMENTS

Attached are a set of charts which depict the information handling and communication requirements of the Office of Policy Development and the Office of Planning and Evaluation. These requirements were analyzed and defined in terms of the major functions and tasks of these two offices, without regard to particular forms or levels of technology. Following are brief explanations of the column headings dealing with information handling and communication requirements.

INFORMATION HANDLING

Accomplishment of the functions and tasks specified in the charts requires certain information handling capabilities. Two aspects of this are shown: (1) the frequency of the task (e.g., "recurring," "sporadic," "as needed"); and second, the nature of the task, described in simple "input," "process," and "output" terms.

Input: Refers generally to the data collection phase of performing specific tasks. The scale, form, and method of data collection activities will vary from task to task. This column indicates whether the information is to be collected from sources, data bases, etc. that are maintained internally (within OPD and OPE) or externally (outside OPD and OPE).

Process: "Analyze, search, sort, edit, list" are cited in the column subheading as examples of the types of information processing capabilities that may be required to accomplish given tasks.

Output: Refers to the result of information collection and processing, such as reports, memoranda, lists, and display materials (e.g., slides, charts, vu-graphs, video-tapes), especially as used in presentations for decision-making.

COMMUNICATIONS

Refers to OPD and OPE information-sharing and communication relationships - internally, with other units inside the White House/EOP complex, and with Cabinet Councils and departments and agencies generally.

Internal OPD/OPE: Among OPD and OPE staff, Executive Secretaries, Senior Policy Advisors, and leadership.

With OCA and Staff Secretary: The Office of Cabinet Administration (OCA) and White House Staff Secretary are treated separately, because of the close working relationships required between these entities and OPD and OPE.

With Other EOP Units: Refers generally to NSC, CEA, OMB, and other EOP offices. However, since OMB is represented on all Council Executive Secretariats, Cabinet Council communications (as indicated in the next column) are assumed to reach OMB.

With Cabinet Councils: Includes regular members of Cabinet Councils and Executive Secretariats.

With Departments and Agencies: With individual departments and agencies outside the Cabinet Council framework, or where the task involves general communication and information collection from all departments and agencies.

OPD Function #1: Cabinet Council Management and Administration

TASKS	INFORMATION HANDLING			COMMUNICATIONS					
	<u>Input</u> Collect data from internal (I)/external (E) sources	<u>Process</u> E.g. Analyse, search, sort, edit, list	<u>Output</u> Produce copy (P = paper required) and display (D)	Internal OPD/OPE	W/OCA & Staff Secty	W/Other EOP Units	W/Cabinet Councils	W/Depts & Agencies	Other
1. Prepare/Maintain Documentation on Council and Secretariat Structure and Operations	----- Start-up, then sporadically -----								
a) Charter; operating procedures; formal agreements			P	X	X		X		
b) Organization of Council, Secretariat, & working groups			P	X	X		X		
c) Key personnel (titles, addresses, phone #s, etc.) and responsibilities			P	X	X		X		
2. Schedule Council and Secretariat Meetings	-- Tasks 2 through 6 are recurring ---								
a) Calendars	I & E	X	P	X	X		X		
b) Notices to members							X		
c) Notices to other participants and interested parties				X	X			X	

TASKS	INFORMATION HANDLING			COMMUNICATIONS					
	Input Collect data from internal (I)/external (E) sources	Process E.g. Analyze, search, sort, edit, list	Output Produce copy (P = paper required) and display (D)	Internal OPD/OPE	W/OCA & Staff Secty	W/Other EDP Units	W/Cabinet Councils	W/Depts & Agencies	Other
3. Coordinate and Support Council and Secretariat Meetings									
a) Pre-meeting materials	I & E	X	P	X	X		X		
b) Final agenda, briefing/handout materials, and visual aids	I & E	X	P & D	X	X		X		
4. Record Meeting Results and Decisions									
a) Minutes	I	X	P	X	X		X		
b) Record/communicate decisions	I	X	P	X	X		X		
5. Coordinate Communication Within and Among Councils and Secretariats Between Meetings				X	X		X		
6. Track Action Items and Work Assignments; Maintain Tickler File on Council and Secretariat Deadlines	I & E	X		X	X		X		

OPD Function #2: Policy Development in Cabinet Councils

TASKS	INFORMATION HANDLING			COMMUNICATIONS					
	Input Collect data from internal (I)/external (E) sources	Process E.g. Analyze, search, sort, edit, list	Output Produce copy (P = paper required) and display (D)	Internal OPD/OPE	W/OCA & Staff Secty	W/Other EOP Units	W/Cabinet Councils	W/Depts & Agencies	Other
1. Collect Basic Background Information on Council Policy Areas and Responsibilities	----- Start-up, then as needed -----								
a) Departments and programs Organization and functions; key positions and personnel; budgets; summary and analytic materials on legislative and Executive order authorities	E	X		X			X	X	
b) Congress Authorizing and appropriations committees, subcommittees, members, and staffs	E	X		X		WH OLA	X		
c) Clientele and interest groups	E	X		X		WH OPL	X		
d) Information systems/resources Newspapers/mag's; abstracts/ indexes/bibliog's; statistical systems; LEGIS/JURIS; etc.	E	X		X		OA, CEA, OMB	X		

TASKS	INFORMATION HANDLING			COMMUNICATIONS							
	Input Collect data from internal (I)/external (E) sources	Process (E) Analyze, search, sort, edit, list	Output Produce copy (P = paper required) and display (D)	Internal OPD/OPE.	W/OCA & Staff Secty	W/Other EOP Units	W/Cabinet Councils	W/Depts & Agencies	Other		
5. Maintain Policy Event Tracking System	Develop internal information system, building on existing systems, such as OCA's "Agency Calendar of Upcoming Events," to track key occasions and deadlines that are part of, or may influence, policy development			X	X	X	X	X			
a) President and Vice-President - short and long range schedule of meetings, speeches, etc.							X				
b) Cabinet, Cabinet Council, Secretariat, and other inter-departmental and interagency working groups - schedules of meetings, deadlines, reports, etc.						X	X				
c) EOP (OMB, NSC, etc.) and individual departments and agencies - calendars of reports, meetings, speeches, etc.								X	X		X
d) Congress - calendars for major legislation and testimony, etc.									WH OLA		
e) Clientele and interest groups - calendars of major meetings and conferences									WH OPL		

TASKS	INFORMATION HANDLING			COMMUNICATIONS					
	Input Collect data from internal (I)/exter- nal (E) sources	Process E.g. Analyze, search, sort, edit, list	Output Produce copy (P = paper required) and display (D)	Internal OPD/OPE.	W/OCA & Staff Secty	W/Other BDP Units	W/Cabinet Councils	W/Depts & Agencies	Other
6. Coordinate Policy Development									
a) Issue identification	X	X		X	X	X	X		
b) Initial screening, definition, and analysis	X	X		X	X	X	X		
c) Secretariat review and discus- sion; refine issue definition and analysis; develop and assess alternatives; prepare for Council consideration	X	X	P & D				X		
d) Council review, discussion, and action/recommendation		X	P & D				X		
e) Cabinet review and action/recommendation		X	P & D	X	X	X			Cab.
f) Presidential review & action		X	P & D	X	X	X	X		Pres.
g) Follow up		X		X			X		
7. Prepare Policy-Related Documents									
a) Action items	X	X	P & D	X	X	X	X		
b) Memoranda for decision-making	X	X	P	X	X	X	X		
c) Background information and supporting data	X	X	P & D	X	X	X	X		

OPD Function #4: Internal Management

TASKS	INFORMATION HANDLING			COMMUNICATIONS					
	<u>Input</u> Collect data from internal (I)/external (E) sources	<u>Process</u> E.g. Analyze, search, sort, edit, list	<u>Output</u> Produce copy (P = paper required) and display (D)	Internal OPD/OPE	W/OCA & Staff Secty	W/Other EOP Units	W/Cabinet Councils	W/Depts & Agencies	Other
1. Communications Control									
a) Correspondence	I	X	P	X	X	X			
b) Telephone logs	I	X							
2. Weekly Activities Reports	I	X	P	X	X	X			
3. File Indices	I	X		X					
4. Personnel/Staffing	I	X	P & D	X					
5. Budget/Financial Management	I	X	P & D	X					

OPD/OPE INFORMATION AND COMMUNICATION REQUIREMENTS

OPE Function #1: Strategic Planning

TASKS	INFORMATION HANDLING			COMMUNICATIONS					
	<u>Input</u> Collect data from internal (I)/external (E) sources	<u>Process</u> E.g. Analyse, search, sort, edit, list	<u>Output</u> Produce copy (P = paper required), and display (D)	Internal OPD/OPE	W/OCA & Staff Secty	W/Other EOP Units	W/Cabinet Councils	W/Depts & Agencies	Other
1. Develop Presidential Strategic Plan Design	I & E	X	P	X	X	X			
2. Coordinate Determination of Policy Areas and Priorities	I & E	X	P	X		X	X	X	
3. Present and Explain Plan to Senior Staff, Cabinet, and President		X	P & D		X	X			
4. Maintain Current Information for Strategic Plan	I & E	X		X		X	X	X	
5. Adjust Strategic Plan as Appropriate as Directed by White House Leadership	I & E	X	P	X	X	X	X		
6. Coordinate the National Indicators System	I & E	X	P & D						

OPD/OPE INFORMATION AND COMMUNICATION REQUIREMENTSOPE Function #2: Evaluation

TASKS	INFORMATION HANDLING			COMMUNICATIONS					
	<u>Input</u> Collect data from internal (I)/external (E) sources	<u>Process</u> E.g., Analyze, search, sort, edit, list	<u>Output</u> Produce copy (P = paper required) and display (D)	Internal OPD/OPE	W/OCA & Staff Secty	W/Other EOP Units	W/Cabinet Councils	W/Depts & Agencies	Other
1. Coordinate Statistical, Data Processing, and Presentation Capabilities to Enable Necessary Collection of Data	E	X				X		X	
2. Coordinate Definition of Expected Outcomes in Policy Development Process	I & E	X	P	X	X	X	X	X	
3. Appraisal of Results and Progress of Presidential Priority Policies	I & E	X	P	X	X	X	X	X	
4. Perform Selective Evaluation of Major Presidential Objectives	I & E	X	P	X		X	X		
5. Present Results of Evaluations to Senior Staff, Cabinet, and President	I	X	P & D	X	X	X	X		
6. Perform Trend Analyses	I & E	X	P & D						

APPENDIX 3

SUMMARY AND ANALYSIS OF PHASE I ALTERNATIVES

There are presently five options that would allow OPD/OPE to meet their critical short term needs. Not all options provide for easy upgrade to meet mid and long range plans. All the options use available resources and, as such, no procurement is necessary.

Option 1: DEC Shared Logic System

The Council on Environmental Quality has a minicomputer-based word processing system (DEC-8) that has 12 terminals, 7 printers, and 16,000 pages of on-line storage. The system is configured to front-end the EOP computer center's IBM mainframe (model 4341). In this way word processing can be done on the minicomputer and data processing could be done on the Office of Administration's (OA) mainframe computers - 2 IBM 4341's.

OPD/OPE could assume the lease for the equipment beginning in May 1981. The costs are as follows:

Recurring Monthly:	Hardware Lease	\$6,000
	Telephone Lines	1,610
	Total Monthly	<u>7,610</u>
1-Time Installation:	Telephone Lines	5,336
	OA*	3,200
	Total 1-Time	<u>8,536</u>

*The Systems Development Division of OA would provide coordination between GSA electricians, C&P telephone company, and the vendor to install the system and get the users trained.

This system will be available May 4 and could be installed in OPD/OPE within a week from that date. It is limited to word processing and would need to be connected to the IBM 4341's for data processing applications such as calendars, schedules, tracking systems, etc. The IBM 4341's will be modified in August to provide faster response time. Telephone lines or TRAN could be used to provide connections. Using the TRAN network, the DEC's could be connected to the PRIME 750 by the end of June, at a probable cost of \$4200 per month.

Advantages of this option are that the system is presently available in the EOP; communication lines are installed; and the system is moderately easy to use. Principal disadvantages are its limitations in terms of size and applications (primarily word processing; no statistical or data processing packages).

Option 2: Lexitron Stand-Alone Word Processors

OPD/OPE could use Lexitron stand-alone word processing units. They could equip each workstation with communications capability. In this way documents could be shared electronically from station to station. Key terminals could be configured to communicate with the EOP computer center to output to magnetic tape or to a high speed printer.

This only meets the short-term need of OPD/OPE to have compatible word processing, and is limited in terms of future growth. However, it does provide immediate help to the critical need for word processing.

12 Lexitron terminals and 6 printers are currently available. The costs are:

Recurring Monthly:	Hardware Lease	\$7,200
	Telephone Lines	<u>1,260</u>
	Total Monthly	8,460
1-Time Installation:	Telephone Lines	4,176
	OA	<u>3,200</u>
	Total 1-Time	7,376

This alternative involves adding point-to-point communications to the present Lexitrons for word processing, and linking them to the IBM 4341's for data processing applications. The present load on the IBM mainframes makes this impractical before August. This alternative could be in place no later than the middle of May.

Advantages of this option are that the equipment is now in use; is relatively inexpensive; and is very easy to use. Disadvantages are the limitations of the equipment in that it has no data processing or graphics capabilities, and building communication linkages would be an expensive and awkward process.

Option 3: IBM 4341 Mainframe

OPD/OPE could have terminals connected directly to the IBM mainframes in the EOP computer center. This would provide many capabilities, including text processing, data base management, statistical analysis, access to outside data bases, and full output to high speed printers. This option moves away from the short term need for sophisticated word processing. OPD/OPE could start with 14 terminals and 6 printers.

Recurring Monthly:	Hardware Lease	\$7,800
	Telephone Lines	<u>2,380</u>
	Total Monthly	10,180
1-Time Installation	Telephone Lines	\$7,888
	OA	<u>4,200</u>
	Total 1-Time	12,088

This option requires the use of the IBM 4341's and 3270 terminals. The IBM 4341's are practically full, and Bowne's Word One is the only word processing package available on it. It is an immediately available option.

Advantages of this option are that the system is operational, and all communication links are established. Disadvantages are that terminals would have to be acquired, the word processing package is extremely slow and outmoded, response time would be slow, and training would be difficult.

Option 4: PRIME 750 Minicomputer

OPD/OPE can timeshare with the White House PRIME 750 minicomputer. This system has turnkey software for word processing, correspondence control, calendar management, electronic mail, and records management. In addition it has full ADP capabilities and is configured to interface with the IBM mainframes. The system has secretary and executive terminals and letter quality printers. At the present time there is room for OPD/OPE to mix and match up to 34 devices. The costs of each device are:

Recurring Monthly:	Secretary Terminal	\$ 300
	Executive Terminal	185
	Letter Quality Printer	450
	Telephone Line	70
Example Configuration:	14 Secretary Terminals	4,200
	10 Executive Terminals	1,850
	10 Printers	4,500
	Telephone Lines	2,380
	Total Monthly	12,930
1-Time Installation:	Telephone Lines	7,888
(34 devices)	OA	4,200
	Total 1-Time	12,088

The PRIME 750 option could be available immediately to provide both off-the-shelf word processing and data processing capabilities. Terminals are not TEMPESTED but PRIME is working to correct this problem in the next 30 days.

Advantages of this option are that the terminals are now available; turnkey software for administrative support would be provided; full ADP capabilities are provided both at the minicomputer and on the mainframes; communication links would be established and easy to use; and the system would be consisted with processing of other Presidential records. Disadvantages are that the system is not now in operation, and costs will increase after October.

Option 5: PRIME 550 Minicomputer

The PRIME computer system is a redundantly configured system with two central processing units. As described above, the PRIME 750 is dedicated to the White House. The PRIME 550 is dedicated to the Office of the Vice-President. Both systems have the same turnkey software for administrative support. There is room on the 550 for OPD/OPE to mix and match up to 15 devices. The costs of the equipment in Option 4 apply.

This option would be available by June 1, after the Vice-President's systems were successfully transferred to the larger PRIME, sharing with the White House.

Advantages and disadvantages of this option are the same as those for option 4. An additional disadvantage is that the system is smaller than the PRIME 750.

APPENDIX 4

INFORMATION SYSTEM FOR POLICY PLANNING

Recommended System Features and Capabilities, By Phase

RECOMMENDED OPE/OPD POLICY PLANNING INFORMATION SYSTEM

PHASE I

- Word Processing PRIME 750
- Office Information Systems: schedule/calendar, issues tracking, list processing PRIME 750
- Communications: C & P Telephone lines for all connections, except those on the second floor where TRAN will be used
- Data Bases: Internally generated documents, tables, charts and graphs, agendas and briefing documents
 External government and private data bases through the Information Center
- Terminals: PRIME terminals for word processing and office information systems.
 Xytron color terminals tied to PRIME 750 or to Boeing for graphics applications
 VT-100 -105 for use with DIDS
- Display area: Room 200, 208, 20 in the OEOB
- Statistical Analysis: Capability available
 Identify new available statistical/color graphics capability
- Display Equipment: Advent screen in Room 208
 DIDS color monitor in Room 20
 TV monitors in 200 as needed
 Slide projectors, vu-graphs
 Add plotter/printer capability in Room 200
- Establish security impact committee
- Establish communications task force
- Establish design task force for remodeling 208 and 450

Participate in the NTIA/GSA/OMB Satellite Communications Network for Conferences by Television project, as a test of this capability in the EOP environment and as a possible source of communication with information sources in various parts

RECOMMENDED OPE/OPD POLICY PLANNING INFORMATION SYSTEM

PHASE II

- Word Processing: PRIME 750
- Office Information Systems: PRIME 750
- Communications: Same as that for Phase I; except addition of telephone lines to West Wing and Room 450
- Data Bases: Same with some dial out capability to Government and Private data bases given to individual staff members.
- Terminals: Same
- Display area: Same with the addition of Room 450, OEOP, and the Cabinet Room and Roosevelt Room in the West Wing
- Statistical Analysis: Add DISPLAY software to the PRIME 750
- Display Equipment: Add newly identified statistical analysis capability; display terminals and equipment
Add TV monitors to Cabinet Room and Roosevelt Room in the West Wing
Add rear screen projection to Room 208 and 450
- Add security requirements to all procurements for EOP Agencies
- Contract for Communications Engineer to lay out EOP network - OA coordinates funding; Secret Service, WHCA and GSA coordinate contract requirements and monitor study
- Present plan for remodeled 208 and 450 and begin implementation
- Continue participating in the satellite conferencing project
- Add COM capability for storage and archival purposes
- Use optical scanner for direct input to EOP/OPD files from typed copy. Begin by using facility under contract.

4/21/81

RECOMMENDED OPE/OPD POLICY PLANNING INFORMATION SYSTEM

PHASE III

Word Processing: PRIME 750 (begin new procurement analysis)

Office Information Systems: PRIME 750 (begin new procurement analysis)

Communications: Cable the OEOB according to approved design of the communications engineer.

Provide encryption to network, both internally to OEOB, from NEOB to OEOB and from either to the West Wing; provide same to Cabinet Secretaries' offices.

Data Bases: Same with addition of new data bases and extended staff member access

Terminals: Same (begin new procurement analysis)

Display area: Same as phase I and II, linked through communications network

Statistical Analysis: Same (begin new procurement analysis if state-of-the-art technology warrants it)

Display Equipment: Same with additional new technology added

Secret Service, WHCA and GSA coordinate cabling approval, contract requirements and monitoring of actual installation;
OA coordinates funding as required

Complete implementation of 208 and 450 remodeling

Review possibility of addition of optical scanner for direct input to EOP/OPD files from typed copy.

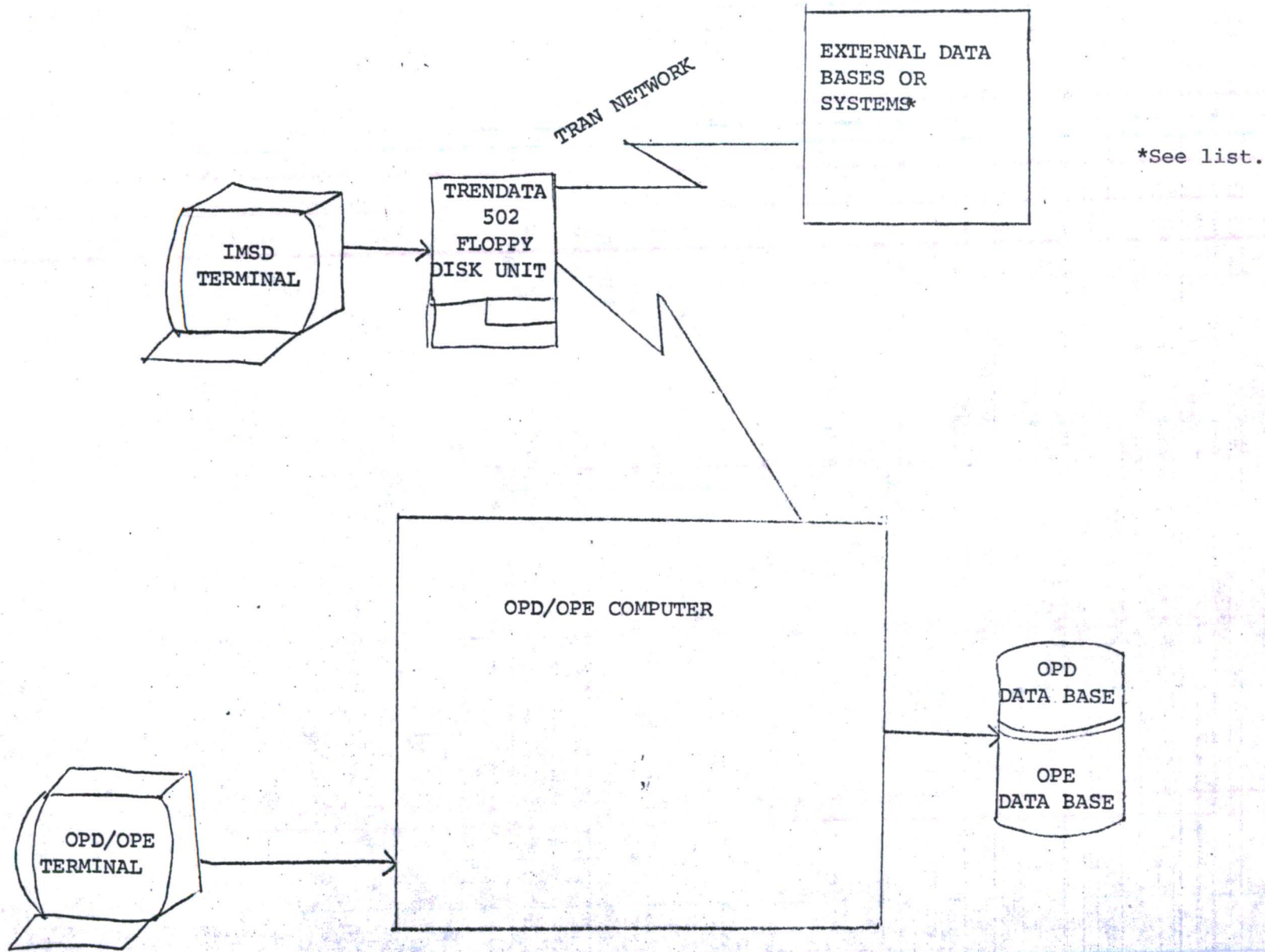
APPENDIX 5

INFORMATION SYSTEM FOR POLICY PLANNING

White House Information Center:

On-Line Data Bases, and Proposed New Service to OPD/OPE

IMSD INTERFACE



EXTERNAL DATA BASES

Following are brief summary descriptions of some of the major data bases or systems that may be used. Only a sketchy idea can be given in such a short commentary.

BRS

Bibliographic Retrieval Services, Inc. is one of the three largest commercial data base suppliers. The company began as a supplier of medical data bases to the academic and medical community, and still concentrates on medical and scientific information. New data bases are constantly being added, however.

Chase Econometrics

Chase Econometrics gives online access to a wide variety of time series from U.S. Government, International and private sources. It provides econometric analysis, forecasting and consulting services for Agribusiness, Energy, Industrial Economics, Metals and Minerals, International Economics, U.S. Economics and Required Economics.

DOE/RECON

The Department of Energy RECON system contains a variety of data bases related to energy production and management. The data bases range from statistical to bibliographic. It also includes research-in-progress and directory data bases.

DTIC

DTIC/DROLS (Defense Technical Information Center/Defense RDT&E On-Line System) provides access to DOD Research and Development project and task level summaries, on-going DOD research and technology efforts at the work unit level; contractor independent R&D efforts shared with DOD and a technical reports data base consisting of bibliographic records of the technical reports submitted to DTIC. These data base have searchable project numbers and contract and funding sources, as well as standard bibliographic elements.

EIES

The Electronic Information Exchange System supports computer conferencing and electronic mail. Conferences on specific subjects can be set up among users throughout the country.

HEDL/Water Use Information System

The HEDL (Hanford Engineering Development Laboratory) Water Use Information System contains data on rivers, lakes and ground water by GSA geographic drainage area codes. It identifies powerplants (of all types) located in each area, flow data for streams at three different probability levels and where available, water quality information.

Interuniversity Consortium

University of Michigan Interuniversity Consortium for Political and Social Research can provide data files of specified items formatted according to requirements, can supply statistical summaries and distributions, or can execute specific searches. They will not undertake to respond in short time periods. Special arrangements can be made for remote access to particular files.

JURIS

Complete texts of cases and briefs of the Supreme Court, the Comptroller General Decisions, and Opinions of the Attorney General are included, as well as the U.S. Code.

LABSTAT

This data base is the central repository for the wide range of public data generated by the Bureau of Labor Statistics.

LEGI-SLATE

Legi-Slate is a complete legislative retrieval system for bills going through Congress. Bills may be identified by number, subject matter, or sponsor. Bill numbers may be stored and their status updated.

Lockheed Information Systems

Lockheed Information Systems is the largest commercial data base supplier, a subsidiary of Lockheed Aircraft and Space. Over 100 data bases cover almost every conceivable subject in mainly bibliographic but also in quantitative form. Any sample list of data bases must be notable for omissions, but among a few often used in EOP are:

Newsearch - a daily update of Magazine Index, National Newspaper Index, Legal Resources Index and Management Contents files.

Magazine Index - References to articles in over 370 popular magazines.

National Newspaper Index - complete indexing of the Christian Science Monitor, New York Times, and Wall Street Journal.

F & S Indexes - Domestic and foreign company, product, and industry information.

Disclosure - Abstracts of reports filed with the Securities and Exchange Commission by publicly owned companies.

NASA/RECON

The National Aeronautics and Space Administration RECON system gives access to technical reports, books and journal articles dealing with aerospace science and policy issues as well as related engineering and metallurgical fields.

NEXIS

NEXIS provides the complete text of articles from the Washington Post, the Economist, Congressional Quarterly Weekly Report, Newsweek, and an increasing number of other news sources.

New York Times Information Service

The Information Bank contains abstracts from articles appearing in the New York Times and over 60 other magazines and newspapers. Other data bases include one of Middle East resources.

SDC

System Development Corp. is another of the three major commercial suppliers. About 50 data bases are available. Among the most frequently used at EOP are:

CRECORD - Current citations from the Congressional Record.

FEDREG - Citations gathered daily from the Federal Register.

CIS Index - Coverage of U.S. Congress publications such as hearings, reports, documents, and Public Laws.