

REPORT TO THE SECRETARY OF STATE OF THE REVIEW PANEL EXAMINING
THE IMPACT ON THE *FOREIGN RELATIONS* SERIES
OF CURRENT DISPUTES RELATED TO THE HISTORICAL OFFICE

13 JANUARY 2009

Criticism of the management of the Historical Office (HO), prompted establishment, on 22 December 2008, of a Review Panel you charged with assessing the real and potential impact contained in those criticisms on the production of the series, *Foreign Relations of the United States* and the public access to the historical record that the series promotes. In abbreviated form, those criticisms were that mismanagement in the HO had caused office morale to suffer, resulting in a troubling increase in the number of experienced historian-compilers leaving the HO.

The panel read the public and anonymous statements, interviewed and/or received statements from some 35 historians and other staff personnel currently or formerly in the HO; interviewed the Public Affairs Bureau's (PA) senior management and the management team in the HO; and reviewed statements made by members of the Historical Advisory Committee (HAC). In addition, the panel was present when, on 22 December 2008, HAC members briefed the Secretary of State about their concerns.

It quickly became apparent that emotions ran high and that there was a great deal of contradictory testimony. Reconciling the contradictions seemed both unlikely (much of it was in one-on-one confrontations) and unproductive. Rehashing the arguments would only reinforce the unhealthy divisions in the HO. We agreed to assess the present and then focus on ensuring the successful future of the HO and the *FRUS* series. Therefore, our report is short and without extensive details.

Our assessment of the present state of affairs, and our recommendations follow. We believe that their implementation will help to restore "Team HO," the atmosphere of trust between HO leadership and the compiler-historians, and between the HO and the HAC that is essential to the *FRUS* series and the public access that it generates. Doing that will require diplomacy and leadership; i.e., effective management.

1. We find that the current working atmosphere in the HO and between the HO and the HAC poses real threats to the high scholarly quality of the *FRUS* series and the benefits it brings. Remarkably, in all our interviews and the statements we received, only a single person suggested that there was no crisis, no problem beyond what is normal in an office.

2. We find that there are major management challenges in the HO that warrant serious consideration of a reorganization of that office. In any event, whosoever is The Historian should have clear and unequivocal work requirements that set forth improving morale and trust within the office as a primary and immediate goal.

3. We strongly recommend that filling the position of General Editor of the *FRUS* as well as any division chief positions in the HO be deferred until the State Department has had the opportunity to evaluate the preceding recommendation regarding reorganization.

4. We find that the work load in the Public Affairs Bureau front office may preclude effective oversight regarding the HO. The Department should consider the best means of providing senior level oversight of the office, including whether to move the HO to another Bureau or put it under the purview of an Under Secretary. In any event, the State Department should consider the optimal placement of the HO within Departmental structure so as to ensure effective management.

5. We recommend that there be a careful and supportive study of information security issues in the HO that is designed to generate practical solutions to the information security workplace challenges that so many of our interviewees have described.

6. We recommend that the HO management, with the approval of its State Department oversight authority and in consultation with the HAC, develop clear paths for the HAC and for office personnel to bring serious professional concerns to the attention of appropriate authorities up the chain of command.

7. Once the issues we have raised are examined, there are a number of more specific suggestions and matters that need attention. One example is the need for clear written procedures regarding re-appointment of members of the HAC. To ensure that those things are addressed, we suggest that some sort of outside involvement be continued until appropriate channels are formally established.

Some closing comments. Whatever the details of this management crisis, and whosoever is right or wrong, we believe that effective management is the responsibility of the managers, not the managed, and that strong effective management and leadership will be needed to rebuild and maintain a positive, high performing team in HO.

One positive aspect of this entire affair is that the historian-compilers, the historians doing public history, the editorial and administrative staff, and the HO leadership all testified with enthusiasm to the honor, the intellectual stimulation, the pleasure, and the importance of the *Foreign Relations* compilations and the access they generate. That is a wonderful, positive, and (may we say) inspiring starting point!

Respectfully,

Warren F. Kimball, chair
Ruth Whiteside
Ron Spector