

Date: August 25, 1972
To: All Budget and Research Department
Staff Members
From: Budget and Research Director
Subject: COMPLETED STAFF WORK GUIDELINES

The doctrine of COMPLETED STAFF WORK will be followed by all staff members of the Budget and Research Department in the conduct of research.

An understanding of the meaning of COMPLETED STAFF WORK is essential for the staff member to know what is expected of him. Attached is an explanation of the doctrine and its origin discussed in an earlier City Manager's Letter issued by former City Manager Ray Wilson.

Even more perplexing to the staff member is how he goes about performing COMPLETED STAFF WORK in his working relationship with his supervisor and division head, other departments, myself and the City Manager's staff. Also attached are a set of "Guidelines for the Budget and Research Department Analyst in Conducting Completed Staff Work."

Read it all and ask your supervisor to answer any questions. Performing COMPLETED STAFF WORK will make your job more satisfying, you worth more to the City, and both your job and my job easier.

Charles E. Hill
Budget and Research Director

CEH/h

Attachments

September 14, 1950

TO ALL DEPARTMENT HEADS:

Subject: COMPLETED STAFF WORK

A few years ago I was attracted by the following statement, neatly lettered and framed, on the wall behind the desk of a man who now is a successful City Manager:

COMPLETED STAFF WORK

Study of a problem and presentation of its solution in such form that only approval or disapproval of the completed action is required.

1. Work out all the details completely.
2. Consult other staff officers.
3. Study, write, restudy, rewrite.
4. Present a single, coordinated proposed action. Do not equivocate.
5. Do not present long memoranda or explanations. Correct solutions are usually recognizable.
6. Advise the chief what to do. Do not ask him.

If you were the chief, would you sign the paper you have prepared, and this stake your professional reputation on its being right? If not, take it back and work it over; it is not yet completed staff work.

This impressed me at the time and I hope it will be helpful to you in your work.

RAY W. WILSON
City Manager

RWW:hk

Copies to all Heads of Divisions

ARE YOU DOING “COMPLETED STAFF WORK”?

(Quoted from a directive issued in 1942 by the Provost Marshal General, U. S. Army)

1. ‘Completed Staff Work’ is the study of a problem, and presentation of a solution by a staff officer, in such form that all that remains to be done on the part of the head of the staff division or the commander is to indicate his approval or disapproval of the completed action. The words ‘completed action’ are emphasized because the more difficult the problem is, the more the tendency is to present the problem to the chief in piecemeal fashion. It is your duty as a staff officer to work out the details. You should not consult your chief in the determination of these details no matter how perplexing they may be. You may and should consult the other staff officers. The product, whether it involves the pronouncement of a new policy or affects an established one, should, when presented to the chief for approval or disapproval, be worked out in finished form.
2. The impulse which often comes to the inexperienced staff officer to ask the chief what to do, recurs more often when the problem is difficult. It is accompanied by a feeling of mental frustration. It is so easy to ask the chief what to do, and it appears so easy for him to answer. Resist that impulse. You will succumb to it only if you do not know your job. It is your job to advise your chief what he ought to do, not to ask him what you ought to do. He needs answers, not questions. Your job is to study, write, restudy and rewrite until you have evolved a single proposed action – the best one of all you have considered. Your chief merely approves or disapproves.
3. Do not worry your chief with long explanations and memoranda. Writing a memorandum to your chief does not constitute completed staff work, but writing a memorandum for your chief for your chief to send to someone else does. Your views should be placed before him in finished form so that he can make them his views simply by signing his name. In most instances, completed staff work results in a single document prepared for the signature of the chief, without accompanying comment. If the proper result is reached, the chief will usually recognize it at once. If he wants comment or explanation, he will ask for it.
4. The theory of completed staff work does not preclude a ‘rough draft’ but the rough draft must not be a half-baked idea. It must be completed in every respect except that it lacks the requisite number of copies and need not be neat. But a rough draft must not be used as an excuse for shifting to the chief the burden of formulating the action.

5. The 'completed staff work' theory may result in more work for the staff officer, but it results in more freedom for the chief. This is as it should be. Further, it accomplishes two things:

- a. The chief is protected from half-baked ideas, voluminous memoranda, and immature oral presentations.
- b. The staff officer who has a real idea to sell is enabled more readily to find a market.

6. When you finished your 'completed staff work', the final test is this:

- a. If you were the chief, would you be willing to sign the paper you have prepared and stake your professional reputation on its being right?
- b. If the answer is in the negative, take it back and work it over, because it is not yet 'completed work'.

City of Phoenix
Budget and Research Department
August 1972

GUIDELINES FOR THE
BUDGET AND RESEARCH DEPARTMENT ANALYST
IN CONDUCTING COMPLETED STAFF WORK

Action	Participant
I. RECEIVING THE ASSIGNMENT	
Depending on the scope and complexity of the research project, an assignment briefing will be conducted for the analyst by one or more of the Budget and Research supervisory staff.	Analyst Section Supervisor Division Head Budget and Research Director *City Manager's Staff
* Occasionally, high priority complex project assignment briefings will be held with the City Manager, Assistant or Deputy City Manager.	
The assignment briefing will outline the purpose and scope of the research, related research projects, departments or other agencies concerned, special constraints, desired completion date and any other available information. As an analyst be sure you get and understand this information.	
Do not expect to be given preconceived conclusions or ready answers to the problem. If the answers were known the study would not be needed.	
II. PREPARING THE RESEARCH PLAN	
Analyst prepares the standard Budget and Research Plan listing the various steps to be taken and estimated completion dates, counseling with Section Supervisor as needed.	Analyst Section Supervisor
III. RESEARCH PLAN APPROVAL	
Review the research plan with your Section Supervisor and Division Head for any modifications and final approval to proceed.	Analyst Section Supervisor Division Head

IV. CONDUCT OF RESEARCH STUDY

Analyst proceeds to conduct research study, counseling with Section Head on completion of each research step or if modification of original research plan is needed. Modifications of original research plan should be reviewed at higher level if significant new approach or time schedule is needed.

Analyst
Operating Department Staff

Research studies normally follow the three major steps below:

- A. Data Gathering – get all the facts straight by interviewing knowledgeable and responsible persons, observing actual operations, or conducting objective surveys, recording all data in file notes, meeting minutes, etc.
- B. Data Analysis – array all your field interviews, observations or survey notes in logical order; check for gaps in information; obtain additional data as necessary; draw tentative conclusions and check soundness against supporting facts.
- C. Report Writing – prepare detailed report outline including major outline sections on the update or background of study, statement of the problem, research findings, solutions, including alternatives, if any (don't overdo alternatives), and recommendations.

Prepare tables, schedules, charts or graphs next, but don't overdo with irrelevant graphics. Write the report narrative with the tabular data for reference.

Read what you wrote. Rewrite awkward phrases, break up paragraphs, and shorten sentences. Make meaning crystal clear. Don't use fancy words our bosses won't understand. Three or four rough drafts to final draft may save everyone a lot of time later on.

Write one-page research report summary in prescribed format. (See A.R. 1.75 attached). Read

what you wrote, cut out non-essential words and phrases, but keep it accurate. Don't cram the whole page full of type. No one will read it all. A little "brown space" won't hurt (see newspaper advertising for eye appeal). Short dot-points one sentence paragraphs are most effective.

Check report title, addressee and carbon copy distribution for appropriateness and completeness.

V. OPERATING DEPARTMENT REVIEW OF RESEARCH REPORT

Analyst reviews draft research report with all affected department and division heads. Make changes and corrections as required. If the affected department does not concur with your findings and recommendations, you may either modify your report or stick to your guns. Most reasonable men can come to agreement through compromise. You make the judgment.

Analyst
Section Supervisor
Operating Department Staff

If a difference of opinion cannot be resolved, tell both sides of the story with full justification for your position.

VI. STAFF REVIEW OF RESEARCH REPORT

Review draft research report with Section Supervisor and Division Head. Make changes and corrections as required.

Analyst
Section Supervisor
Division Head

VII. BUDGET AND RESEARCH DIRECTOR REVIEW

Division Head notifies Budget and Research Director research study is ready for review with City Manager's staff and briefs Budget and Research Director on research findings and recommendations. Budget and Research Director authorizes review with City Manager's Office

Division Head
Budget and Research Director

VII. BUDGET AND RESEARCH DIRECTOR
FINAL REVIEW

Analyst presents final signed research report to Budget and Research Director for final approval and endorsing signature.

Analyst
Section Supervisor
Division Head
Budget and Research Director

VIII. COMPLETED STAFF WORK
ACCOMPLISHED

Analyst has now performed completed staff work.

Analyst

After we got back to Phoenix today from our adventure on the Verde Canyon Railway, I downloaded your e-mail with the completed staff work documents attached.

Thanks for the memories. I had come back to the City in February 1970 as the B&R Director. The Department had doubled in staff with the addition of 13 new work standards analysts under the tutelage of Booz-Allen Hamilton consultants. Soon problems began to arise with the new analysts who had some education but had made dramatic career shifts from unrelated positions in other City departments. Finally, out of frustration with the staffs performance (of uncompleted staff work), I was compelled to introduce the concept of completed staff work to them to try to smooth out how we functioned together. It must have helped but it was not easy to carry out.

Looking back, after reading my guidelines for analysts in doing completed staff work, I'm not sure if it met the letter of intent of the Army Provost Marshal General. While I'm certain that the higher echelons of the military did practice it, guiding junior staff members right out of college in civilian pursuits in its use is extremely difficult. But once mastered, it is the only way to go to achieve high performance in any organization.

Your former colleague, Charles