



Renewing the OSS Legacy

Recruiting Academics as Consultants

by Lester Paldy

INTRODUCTION

If it is to maintain its edge, the Intelligence Community (IC) must continue to adapt to changing needs and consider new perspectives. The National Intelligence Strategy (NIS) released in August 2023 by the Director of National Intelligence makes clear that the IC needs to reconsider its classification barriers, strengthen ties, and leverage capabilities available in the private sector, academia, and non-governmental organizations.¹

Intelligence Community (IC) agencies must compete for talent with many other government and private organizations. Advertisements and brochures extoll the challenges and benefits of IC careers, showing diverse and enthusiastic groups of young men and women, but the sites do not mention staff or consulting opportunities for academics. Insiders report the recruitment of increasing numbers of Ph.Ds for full-time intelligence careers, perhaps reflecting the scarcity of tenure-track university positions. However, once academics are recruited for full-time, career-track positions, many may not choose or be able to maintain their university connections where they might build more positive relationships between the IC and academic community, an issue that needs to be addressed.

During WW II the Office of Strategic Services (OSS) recognized the talents and expertise that academics could bring to its mission and used informal networks to recruit them as staff officers. An updated version of the OSS approach combined with explicit recruiting advertisements has the potential

to respond to the NIS and enhance IC capabilities to advance the national security interests of the nation and strengthen relationships with the academic community. One way to achieve this is by recruiting more academics for consulting and contract assignments in IC agencies (not as sources), and by creating a volunteer Academic Reserve. This paper explores the potential and problems associated with this approach and concludes with a brief description of the author's experience as an academic in the CIA while maintaining a university position, serving first as a staff officer and for many years as a part-time contractor.

IC HESITATION

What factors might account for IC reluctance to contract with academics while they retain their academic positions? The oft-voiced concern is that if it became known that such persons work for the IC, other academics will be placed at risk when working or traveling abroad. The hesitancy of some IC agencies to acknowledge relationships with academics is often evidenced by IC publication review boards' reluctance to approve articles describing such relationships.

IC efforts to recruit more academics for contract positions may encounter resistance at first on both fronts. Many academics try to maintain a degree of political neutrality in their research and teaching. IC agencies, however, have sometimes been subject to efforts to politicize or misuse them. Some members of the academic community view the IC, particularly the CIA, with suspicion, making it difficult to recruit some academics concerned about their colleague's opinions and reactions. Former Penn State University president Graham Spanier who once led a successful effort to build relationships between the IC and academic leaders commented recently about the problem posed by faculty unease about IC relationships:

“There is also the consideration that academics have historically had suspicions about intelligence and law enforcement agencies fostered by the revelation of certain clandestine activities. Academe is inherently open, with few secrets, and secrecy is frowned upon. The agencies are aware of this culture, and often avoid it. Academics might also shy away from affiliation or even cooperation for fear that their academic colleagues will have disdain for such allegiance. Older academics remember the era of J. Edgar

1. DNI.gov, 2023 National Intelligence Strategy, August 2023

Hoover at the FBI, for example, and the fact that he maintained files on some academics.”

“Another drawback for academics getting involved with the intelligence community is the reward system in colleges and universities. Especially at the kinds of research universities where relevant expertise is most likely found, the system of rewards—promotion, tenure, salary increases, and professional standing—is significantly based on peer-reviewed publications in professional journals, publication of books, presentations at professional meetings, and supervision of graduate students. This can be a complication for all but the most seasoned and secure academics since security clearances and publications available for the world to see may not always mix. Moreover, scholarly collaboration is becoming blind to international borders.”²

Robin Winks’ magisterial examination of the relationship between the academic and intelligence communities through the late 1960s concluded that “both were responsible, certainly: academics generally wanted nothing to do with what was perceived as an unethical subgovernment, and for the most part intelligence people were angered at having been rejected by the subculture of which they thought they were a part.”³

Academics usually specialize in narrow fields of study which can make it difficult to apply their expertise to the broader intelligence missions of the IC. Some may lack the interpersonal skills and experience needed to function in team environments while others may perceive the IC’s necessarily secretive environment as incompatible with a culture of transparency and open communication they consider important.

It is not surprising that any connection between the intelligence community and academic community is often perceived as controversial. Almost five decades after the revelations of the 1975 Church Committee exposed the Nixon administration’s misuse of the CIA and FBI to suppress domestic opposition to the Vietnam war, and 20 years after the decision to invade Iraq, some academics remain uneasy about any connection with the IC. Daniel Golden argues that the close connection of intelligence organizations to research universities has become disproportionately intrusive, resulting in an erosion of intellectual autonomy, and

threatening the impartiality and independence of research and teaching.⁴ The IC can address these issues by building overt relationships with academic institutions to foster a better understanding of its mission and values. This can be done through targeted outreach to build partnerships involving universities in unclassified research of interest to the IC, and developing programs that allow academics to work with the IC in consulting and volunteer capacities.

The IC is likely to be particularly interested in academics with relevant government or military experience, who teach intelligence courses, or who have otherwise demonstrated an interest in working in the intelligence community. It can learn from the model established by the OSS. In addition to employing academics interested in full IC careers, it can build bridges and minimize cross-cultural problems by bringing academics into the intelligence community as long or short-term consultants to work on analytic or operational assignments unrelated to their campuses. Such assignments can allow academics to contribute to the intelligence community mission without undermining the principles of academic freedom and intellectual autonomy. What lessons might be learned from the OSS experience?

OSS 1942: PERCEPTIONS OF VALUE ADDED

At the outset of World War II, the United States faced an intelligence gap. Without a centralized intelligence agency, the US struggled to collect and analyze intelligence from war zones. President Franklin D. Roosevelt responded by creating the OSS, an important precursor to today’s CIA.⁵ One of the most notable aspects of the OSS was its success in bringing academics and other experts into its ranks.

The value of bringing academics into the OSS was clear to its charismatic director, General William Donovan. He believed academics could provide expertise in all fields of interest needed to plan and carry out OSS missions. They understood the social, cultural, and political contexts and scientific and technological capabilities of foreign countries and often brought with them fresh perspectives and ideas. Many academ-

2. Private communication.

3. Robin Winks. *Cloak and Gown: Scholars in the Secret War*. New York: William Morrow and Company, Inc. 1987.

4. Daniel Golden. *Spy Schools: How the CIA, FBI, and Foreign Intelligence Secretly Exploit America’s Universities*. New York: Henry Holt and Company, 2017

5. Richard Harris Smith. *OSS: the Secret History of America’s First Central Intelligence Agency*. Guilford, CT; Lyons Press, 2005.

ics had different ways of approaching problems and analyzing data than methods employed by traditional military intelligence analysts at a time well before analytical methods were studied and systematized by the IC.⁶ Richard Harris Smith describes the OSS Research and Analysis (R&A) branch as “the first effort by any world power to harness the talents of its academic community to official analysis of foreign affairs,” and that “Donovan assembled the best academic brains he could beg, borrow, or steal from the universities, laboratories, and museums of America, looking like “a star-studded college faculty.”⁷

A brief description of Donovan’s efforts to recruit academics appears in William L. Langer’s autobiography.⁸ Langer was Coolidge Professor of History at Harvard University and an eminent diplomatic historian. When Donovan appointed James Phinney Baxter, president of Williams College, to head the Office of the Coordinator of Information (COI) in the summer of 1941 before Pearl Harbor and before the OSS was created, Baxter appointed Langer to chair its board. After being appointed as director of R&A, Langer enlisted a staff of academic experts from Harvard, Yale, and other prestigious universities that included analysts Sherman Kent and Ray Cline, both of whom would go on to become senior officers at CIA. Langer organized the CIA’s Office of National Estimates with the formidable acronym, ONE, and later served as a member of the President’s Foreign Intelligence Advisory Board.

Donovan’s effort to recruit academics in 1941-42 is reminiscent of the beginnings of the Manhattan Project to build the first nuclear weapon, when scientists across the US responded to the invitation to join the project, lured by the prospect of working with a team headed by the equally charismatic J. Robert Oppenheimer and other scientific luminaries. Winks’ book covers in some detail the early days of R&A and describes some of the remarkable array of academics recruited by the OSS.⁹

OSS RECRUITING AND SELECTION CRITERIA

The OSS relied heavily on personal networking to identify potential academic recruits as well as referrals from individuals already working within it. The criteria that the OSS applied to academic recruitment process could be used as well today. They included:

- Expertise: The OSS sought out academics with specialized knowledge in areas such as foreign languages, history, political science, science, and engineering.
- Patriotism: It sought individuals who were passionate about serving their country and believed in the importance of the new agency’s mission.
- Adaptability and discretion: The OSS needed academics who could quickly adapt to new and challenging situations and work effectively in a team environment. Given the sensitive nature of its mission, the OSS needed individuals who could maintain confidentiality and avoid disclosing classified information.

The OSS recruited a group of leading psychologists to assemble a battery of tests designed to assess various attributes, including intelligence, personality, and motivation. One of the most important tests was the *Assessment of Men* designed to evaluate candidates’ personality traits, such as assertiveness, independence, emotional stability, and adaptability. The test consisted of a series of open-ended questions asking candidates to describe how they would react to hypothetical scenarios such as being confronted in a secure area attempting to steal documents.¹⁰

Evaluators scored candidate responses based on a set of predetermined criteria. They believed the test was an effective way to identify candidates who would be suited for the unique challenges of OSS operations. The test also served as a precedent for modern screening and training assessments requiring candidates to respond to analytic and operational scenarios. By focusing on these criteria, the OSS was able to attract a diverse group of talented academics who contributed significantly to a remarkable range of operations during World War II. OSS groups included several made to order for academics then and which have counterparts today:

6. Robert M. Clark. *Intelligence Analysis: A Target-Centric Approach*. Washington D.C., CQ Press, 2007

7. Smith, p. 11

8. William L. Langer. *In and Out of the Ivory Tower: The Autobiography of William L. Langer*. New York; Neale Watson Academic Publications, 1977

9. Winks, Chapter 2.

10. H.A. Murray & Associates. *Assessment of Men: Selection of Personnel for the Office of Strategic Services*. New York: Rinehart & Company, 1943

- Research and Analysis Branch (R&A): R&A Branch provided intelligence on enemy capabilities and intentions. It recruited academics and researchers with expertise in fields such as economics, politics, sociology, and anthropology. General Donovan regarded it as one of the most important OSS units.
- X-2: This branch directed counterintelligence activities against enemy agents and espionage networks. It recruited academics and other specialists with expertise in languages, codes, and cryptography.
- Morale Operations (MO): MO branch conducted psychological warfare activities, recruiting academics and other specialists with expertise in fields such as psychology, sociology, and media.

TRADITION INTO ACTION

What traditions of the OSS might guide and shape a modern intelligence agency's effort to recruit academics for consulting contracts? The IC could replicate some practices used by the OSS:

- Seek a diverse range of talents: The OSS made use of networks of academics initially drawn from prestigious Ivy League universities, often described as “pale, male, and Yale,” but the modern IC can draw upon a much wider array of universities and colleges, including institutions like historically Black colleges whose graduates are under-represented in most IC agencies.
- Offer fully cleared academics consulting appointments that allow them to contribute to intelligence efforts, making clear that publication of work related to intelligence activity must be reviewed and approved prior to publication.
- Emphasize the importance of national service: The OSS appealed to academics' sense of duty to their country. Modern intelligence agencies can similarly emphasize the importance of academics' contributions to national security.
- Provide opportunities for professional development and advancement such as training in intelligence analysis and opportunities

for promotion and careers within the IC for any who choose to stay on.

In 2005, the FBI created the National Security Higher Education Board (NSHEB) comprised of leaders from the intelligence community and 15 research university presidents, including former DCI Robert Gates, then president of Texas A&M. Former Penn State University president Graham Spanier chaired the board and provided essential leadership. Until its dissolution in 2018, it met periodically to discuss issues of mutual concern, including the threat of foreign espionage on university campuses. The presidents recognized this had to be done without impinging upon academic freedom, scholarly exchanges, and global partnerships. The development of relationships between university presidents and government officials still has resonance. Reactivating such a board would be a useful step toward gaining increased cooperation of university leaders in position to encourage academics to become involved in the intelligence community.

OBSTACLES

There are obstacles to bringing academics into the contemporary IC as contractors. One is the occasional (some would say endemic) lack of understanding between the two groups. Some academics and former officers who follow IC issues closely have been critical of its methods, arguing that the IC is often too focused on actionable intelligence, covert action, and paramilitary operations while failing to place sufficient emphasis on strategic analysis. Others fear the IC is too subject to politization, citing the Iraq war and the torture of terrorist suspects following the 9/11 attacks as recent examples.

Many academics may not know that the president must explicitly approve covert actions and that congressional committees provide close oversight. “Enhanced Interrogation” required presidential approval and the Department of Justice prepared guidelines for its use. In turn, some intelligence officers consider academics naive and detached from the realities of national security. Overcoming this lack of understanding will require a concerted effort from both sides to engage in dialogue and build relationships based on mutual respect for their different traditions and missions. Academics working as contractors and consultants are well-positioned

to clarify distorted impressions of IC reality held by their colleagues.

Despite recent and long-overdue efforts to expedite the process, obtaining a security clearance can be a barrier to entry for academics who may not have the experience or patience necessary to navigate through government bureaucracy. Some academics may also be reluctant to obtain a security clearance due to concerns about government surveillance and privacy.

A third obstacle is the issue of research freedom. Academics value their ability to pursue research topics autonomously in university settings. Those considering joining the IC, whether for a career change or for consulting assignments, need to know that agencies typically direct analysts to focus their efforts on specific policymaker requirements. Few intelligence agencies can afford to support the kinds of curiosity-directed research that often yields surprising and valuable results; the IC is not the National Science Foundation or National Institutes of Health.

Of all federal agencies, perhaps the agencies of the IC may be most likely to be tolerant of any academic eccentricity and interested in unusual research. For example, when the US started to provide nuclear safety and security assistance to Russia in the aftermath of the Cold War and learned that Russian train cars carrying nuclear weapons were poorly protected, it considered providing more secure US railcars. Would they fit on Russian tracks and pass through railway stations? The IC needed to know the rail gauge and other technical dimensions of the Soviet railway system and found an obscure researcher specializing in arcane railway data. This analytic achievement was reminiscent of the OSS Office of Research and Analysis success in WW II when its analysts used serial numbers from captured Nazi equipment such as truck tires to determine quantities of material produced by manufacturing plants to establish bombing priorities.¹¹

The IC can also learn from other intelligence organizations that recruited academics during WW II and often ignored or tolerated eccentricities. When Winston Churchill visited Bletchley Park in 1941 to meet with cryptanalysts engaged in breaking the Nazi Enigma code, he was struck by the eccentricity of some of the men and women he met, remarking afterward “I know I told you to leave no stone unturned to find the necessary staff, but I didn’t mean you to take me so literally.”¹²

Despite obstacles, the IC can recruit academics as consultants by creating a more transparent and collaborative relationship between the intelligence community and academia. This can include establishing regular dialogues, taking advantage of conference opportunities and participation in university programs to familiarize academics with the IC and its methods. Academics teaching intelligence courses are obvious candidates who can serve as liaison to interested colleagues.

ONBOARDING

How might a typical academic react when joining the IC as a contractor? It will depend on a variety of factors, including personality, background and expertise, and the specific demands of the mission. It will often be a significant change from academic environments involving research, teaching, and public service. Experience suggests most will be excited and challenged by the chance to apply their research to solve pressing intelligence problems while retaining their academic positions. For example, a scientist might be able to provide valuable insights into the state of a foreign nation’s weapon development by observing facets of its research and development program that might not be noticed by a layperson. A social scientist who had spent much of a career following events in a foreign country might glean something from open-source reporting that would not otherwise have been noted. In this way, academics can adapt to the demands of the job and make a valuable contribution to the intelligence agency.

There are several steps that an intelligence agency can take to smooth the path of an academic joining the organization as a consultant. (Perhaps some agencies are doing this now for academics appointed to career track positions.) The agency should:

- Define responsibilities and expectations in detail, including the specific projects or areas of research, the duration of the assignment, and any special security procedures or other requirements.
- Provide appropriate training on the agency’s policies, procedures, and security protocols, as well as any specific tools or technologies they will be using.

11. Langer p. 191

12. David Kahn. *Seizing the Enigma: The Race to Break the Nazi U-Boat Codes*. New York. Barnes & Noble Books, 1998

- Assign a mentor or sponsor to the academic to help them navigate the organization and provide guidance on any questions or concerns they may have.
- Facilitate networking opportunities for the academic to meet and collaborate with other professionals within the organization, as well as with external partners.
- Allow them to express their views within the agency without fear of retribution or censorship.
- Provide feedback and support, including constructive assessments of their work and opportunities for professional development.
- Ensure a smooth transition at the end of their assignment, maintaining communication channels as appropriate.

By taking these steps, the intelligence agency can help to ensure a productive and positive experience for consulting academics, benefiting from their expertise and perspectives and their ability to build relationships with campus colleagues.

IC STAFF REACTION TO IN-HOUSE ACADEMICS

The reaction of professional intelligence officers to an academic joining their working environment is likely to vary depending on the specific circumstances and individuals involved. Some possible reactions are:

Interest: Intelligence officers are trained to gather and analyze information. An academic may be able to offer valuable insights and perspectives that could enhance the staff's understanding of certain issues.

Skepticism: Some intelligence officers may be skeptical of an academic's ability to adapt to the typically fast paced and high-pressure environment of the IC. They may also be curious about an academic's motivation, particularly if the academic has not previously worked in a field related to intelligence or national security.

Collaboration: If the academic and intelligence officers can establish a productive working relationship, they can collaborate on projects or share information to achieve common goals. This can be particularly beneficial if the academic has unique skills that can be applied to the IC mission.

Competition: In some cases, intelligence officers may feel threatened if they perceive the academic has

been brought in specifically to bring new ideas to the table. This can create a sense of competition or tension that may need to be managed to foster a productive working environment.

Overall, the reaction of professional intelligence officers to an academic joining their working environment will depend on a variety of factors, including the academic's area of expertise, the specific goals of the agency they join, and the personalities and attitudes of the individuals involved. However, if both parties are open to collaboration and willing to learn from each other, the presence of a consulting academic can be an asset to the IC.

CREATE A VOLUNTEER ACADEMIC RESERVE

To meet the growing complexity of challenges, intelligence agencies need to explore new approaches taking advantage of expertise from diverse academic disciplines that can also begin to bridge the gap between intelligence and academia. One way to do this is to create an "Academic Reserve" like a military reserve. This reserve would engage academics as pro bono consultants for short assignments, enhancing problem-solving and cooperation between the intelligence community and academia. The Academic Reserve can tap into academia's diverse expertise, spanning many disciplines, enabling intelligence agencies to approach problems from different angles, and finding comprehensive and effective solutions.

Agencies would post invitations to apply for the Reserve, screen applicants, and invite selected candidates for interviews. Those appointed to the Reserve would agree to be consulted on short notice when the agency needed assistance with a specific problem and did not possess the necessary internal capability. Enlisting assistance from academic volunteers available on short notice can expedite analysis and swift responses to emerging global challenges. The collaboration can build trust, dispel misconceptions, and foster relationships. It can also inform academics about intelligence challenges, facilitate informed discussions, and align academic research with intelligence problems.

Many IC units, rarely, if ever have business contracts with academics, and may be reluctant to establish relationships with uncleared volunteers. Full clearance procedures are time-consuming and expensive, but Reserve members would be expected to

undergo national agency checks. Some reserve members considered for particularly sensitive or long-term projects requiring salaried consultancies would be expected to apply for the usual IC clearances.

Brief trials of such a reserve at CIA in the 1990s reflecting the vision and support of former Group Chief Elinor Houghton Kelly showed the plan was feasible. Several academic visitors were invited to headquarters to brief on their specialties and receive briefings on problems of interest and necessary security measures. All said they were honored to be asked to contribute to the IC and that the invitation was one of the high points of their careers. While some offices were reluctant at first to invite academics “inside,” most soon realized they could take advantage of reserve members’ access, expertise, and eagerness to volunteer. National intelligence service has considerable cachet, and the IC should exploit it by creating an Academic Reserve.

AN EXAMPLE

A sample of one does not provide a basis for a dispositive argument, but experience as an academic privileged to work as a staff member and contractor at the CIA for 25 years while maintaining an academic position may serve as a feasibility study.

My initial reaction to the late CIA officer Arthur Hulnick’s 1988 invitation to consider applying for a position as CIA Scholar in Residence was one of surprise that my study of arms control might be of interest to the Agency. I had visited the CIA years before when I spent a week at the State Department. We toured CIA headquarters as part of our orientation, and I left Langley with the impression that it was an efficient organization. A year later, I visited the Agency again with a group of deans to meet with Agency Director William Casey, who wanted to encourage us to steer promising candidates toward the CIA. Again, I came away impressed with the small glimpse of its organizational culture.¹³

After soliciting the approval of my university president, John Marburger, I told Hulnick I would like to apply, made plans for a leave of absence, and started the application process familiar to every member of the IC. It took several months for the long background investigation, and as a former Marine officer, I was not

surprised by the slow government procedure. I was pleased and thrilled when I received a letter appointing me as a staff intelligence officer in February 1989.

OFFICE REACTION

Looking back, I think the members of the CIA Arms Control Intelligence Staff (ACIS) led by Douglas McEachin, may have regarded me as a curiosity at first. I was the only academic amid a group of seasoned career officers and had the impression at the time they were waiting to see what kind of a person I was, and whether I would mesh well with their intense work focusing on monitoring arm control agreements. “Had I been polygraphed?” my new colleagues asked. They seemed satisfied when I said I had been. It reminded me of the time when I was a new Marine lieutenant assigned to lead an infantry platoon with an experienced sergeant who was sizing me up. I knew then that my actions would be closely observed, and that to be accepted by him and the platoon I would have to perform well.

I adopted the same tactic as a new man in ACIS. I listened carefully, asked questions, read everything I could find related to the work, came in early and stayed late. That was not difficult to do since I was living in Virginia without my family and traveling home on weekends when I could. I remember working in my cubicle around 2200 one night, alone in the office, when I sensed someone near me. I had neglected to deactivate the door alarm properly, alerting the security guards, two of whom were standing silently behind me.

By the end of the first month, my office partners seemed to have accepted me. They read me into the material I needed to know to function on a team representing CIA on an interagency committee backstopping a nuclear negotiating delegation in Geneva, a task that would occupy me for the next year and a half at ACIS.

It was satisfying to feel accepted as someone who could contribute to the work of the Agency and assigned a substantial responsibility. Instead of reading about arms control events in the press, I was providing intelligence support for US policymakers. I knew then that I had made the right decision to take a leave of absence from the university and be apart from my family for much of the time.

13. Lester Paldy, “Beginnings,” in *More Stories from Langley: Another Glimpse Inside the CIA*, ed. Edward Mickolus (Lincoln: Potomac Books, University of Nebraska Press 2020), 201-219

UNIVERSITY RETURN

Two close friends at the university knew where I was, but my absence from the campus did not seem to be noticed. Professors can take leaves of absence without pay (universities use the released full-time salary to hire oft-exploited adjuncts and save the difference). Some faculty, particularly in the sciences, may travel frequently to distant research sites or other universities. No one pays attention. When I returned to the campus in the fall of 1990, it was apparent and somewhat ego-deflating to learn that few people even knew that I had been away.

I had only been home for a few weeks in the fall of 1990 when I got a call from ACIS. The Soviet Union was shaky, but still in place, and there were nuclear weapon testing issues to work on. Would I be interested in becoming an ACIS contractor spending a few days a month and school breaks at Langley? I knew I could work it out around my teaching schedule and said yes.

When the Soviet Union dissolved in December 1991 and the workload at ACIS declined, the Directorate of Operations offered me a contract to support officers working against scientific targets. Occasional briefings to FBI agents led to a small contract with the FBI Counterintelligence Training Center at Quantico

where I had trained as a Marine 45 years earlier. I heard later that the groups I worked with were pleased to have a university professor as a team member and my supervisors may also have liked not having to prepare time-consuming performance evaluations of my work.

Without intending to do so, I may have realized General Donovan's vision of integrating an academic life into the world of the intelligence community. Others are in a better position to judge, but I believe I left both none the worse for wear. My experience suggests that recruiting academics to serve as either employed consultants or as pro bono members of an Academic Reserve IC while they retain their university positions can build on the OSS tradition and benefit the nation. I'm confident that many academics would welcome the call to serve their country as our predecessors did in WW II. Would I do it again? Absolutely. It was a privilege to serve with teams of exemplary men and women who were totally committed to their work, and the experience shaped my research and teaching for the rest of my time at the university.

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