

HR Exchange

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2004 Elections Prompt Ethics Commission Review

Marilyn Hughes, Executive Director
Ethics Commission

With 2004 elections coming up, it is a good idea to review the Constitutional Ethics Rules [Section 257:1-1-1 et seq. of the Rules of the Ethics Commission, 74 O.S. Supp. 2003, Ch. 62, App.] regarding restrictions on political activity of state officers and employees both individually and in the workplace.

Classified Employees. Classified employees are prohibited from using their official authority to influence or interfere with an election or nomination to office, becoming a candidate for state elective office in a partisan election, directly or indirectly soliciting contributions for a partisan committee, handling such contributions, or participating in a partisan fund-raising activity.

Classified Employees of OSBI and OSBNDCC. Classified employees with the power of a peace officer, who work for the Oklahoma State Bureau of Investigation or the Oklahoma State Bureau of Narcotics and Dangerous Drugs Control have additional restrictions. They include prohibitions against serving as an officer of a party committee at all levels; organizing or reorganizing a party committee; soliciting votes for partisan state office or party committee office; acting as a watcher at the polls; driving voters to the polls; endorsing or opposing a candidate in a partisan political advertisement, etc.; serving as a delegate, alternate or proxy to a party convention; addressing a partisan political gathering; initiating or circulating a partisan nominating petition; or taking an active part in political organization management.

Retained Rights of Classified Employees. Except as otherwise prohibited, a classified employee retains the right to register and vote; express an opinion privately and publicly; display political paraphernalia except while in official work status or a uniform identifying him or her as a state em-

ployee; serve as an officer of a party committee at any level; participate in the activities of a civic, community, social, labor, or professional organization; be a member of and participate in a party committee or PAC, except as prohibited; attend a political convention, rally, fundraising function or other political gathering; sign a political petition; make a voluntary financial contribution; be politically active in connection with a ballot measure; serve as an election judge or clerk; and otherwise participate in public affairs except as prohibited.



During Work Status. A classified employee is prohibited from engaging in political activity while on duty, in the assigned work areas of a state agency, or while in a uniform that identifies the person as a state employee.

Campaign Paraphernalia. Both classified and unclassified employees are prohibited from wearing a campaign button, hat, badge or other campaign paraphernalia during the hours that the employee is officially in work status for an agency.

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Great Things Can Be Accomplished Through Successful Teamwork!

Joyce Smith, OPM

Teams are often the basic units of work, with members outperforming expectations through innovation and cooperation. Outstanding performance that is recognized is repeated.

Recognition of outstanding teams can be accomplished by participation in *Quality Oklahoma Team Day 2004*. Agencies can acknowledge outstanding performance and success in projects resulting in improved customer service and satisfaction, reduced time, decreased costs, generated income, improved employee morale, red tape reduction, resource management, and/or partnerships with others.

Nominating your agency team(s) for a *Governor's Commendation Award of Excellence* effectively and meaningfully demonstrates your appreciation of their contributions to the success of your agency's mission. *Quality Oklahoma Team Day 2004* will be observed at the State Capitol on Thursday, May 6, 2004, from 11:00 a.m. until 2:00 p.m., with team awards to be presented in the House Chambers at 2:30 p.m. This is an outstanding, cost-effective way to boost your employees' morale and motivation. At the same time, it is an opportunity to "brag" a bit to the public about your agency's successful initiatives and accomplishments. The event coincides with 2004 *Public Service Recognition Week* (May 3 - 9).



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From the Desk of the Administrator

On February 26, 2004, the state of Oklahoma bid farewell to a veteran state employee, and on March 31, 2004, the state will say goodbye to another. Both individuals contributed quality time and outstanding effort to state government human resources during their tenure. And, I count both individuals not only among my colleagues, but among my friends.

On February 26, Dr. George Humphreys left his post as Research Director of the Oklahoma House of Representatives to become the Director of the Muhlenberg Campus of the Madisonville Community College in Kentucky. Dr. Humphreys began his public service career with the Oklahoma Legislative Council in January 1979 and with the Oklahoma House of Representatives in August 1980. He became House Research Director in 1985.

During his tenure with the House of Representatives, Dr. Humphreys made significant contributions to the recording of the history of the state of Oklahoma, as well as of the state Legislature. His book, *Oklahoma Politics and Policies: Governing the Sooner State*, was recognized as the *Best Nonfiction Book* in 1991 by the Oklahoma Center for the Book. His publication, *A Century To Remember: A Historical Perspective on the Oklahoma House of Representatives*, was selected as a *notable state document* by the American Library Association.

Throughout his 25 years of service, Dr. Humphreys was never one to quietly or idly watch things happen, but was always deeply involved in legislative milestones. He was actively involved in ethics, election law, and campaign reform; state administrative rules and administrative law reform; governmental reorganization; and tobacco funding.

During my tenure with OPM, which began in 1991, Dr. Humphreys was the House staff "point man" on state human resources legislation. I and members of my staff spent many hours with him hammering out and fine-tuning the provisions of House Bill 2331, *The State Human Resources Reform Act of 1994*, which required the OPM Administrator to establish standards for continuing training and certification of agency personnel officers and affirmative action officers, and created the Affirmative



Oscar B. Jackson, Jr., OPM Administrator and Cabinet Secretary of Human Resources and Administration; Dr. George Humphreys, former Director of the Research Division of the Oklahoma House of Representatives; Dayna R. Petete, OPM Assistant Administrator for Communications and Legislative Liaison; and Marty Irwin, former OPM Associate Administrator for Policy Services, who retired in 1999.

Action Review Council to review agency Affirmative Action Plans and to request an investigation of any agency it believes has violated EEO/AA laws or has established a pattern of non-compliance with affirmative action laws; and Senate Bill 464, the *Classification and Compensation Reform Act of 1999*, which created a classification system based on job families that incorporate a wide variety of jobs and that permits advancement through these families via career progression; broad pay bands and pay movement mechanisms that provide agencies with the flexibility to address recruitment and retention needs; and a performance management system that requires managerial accountability and supports a pay-for-performance culture.

Dr. Humphreys served the state above and beyond his responsibilities as Research Director. He served as Vice President of the Oklahoma Chapter of the American Society for Public Administration, and as Chair of the Jan Eric Cartwright Memorial Library Advisory Committee. Dr. Humphreys also served as a member of the Human Resources Management Advisory Committee, which was created by the Legislature in 1994, to study the unclassified state service, recruitment and selection, single leave, performance appraisals, and delegation of personnel functions. HRMAC completed a final report of its findings and recommendations in 1996, following a year-and-a-half of study.

Desk of the Administrator, continued on page 5

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Solicitation of Contributions from State Employees. An elective officer or the officer's agent is prohibited from soliciting state employees in the officer's governmental entity. Nor can an employment advantage or disadvantage be provided based on an applicant's or employee's promise or failure to make a contribution.

Use of Public Funds, Property, Time, and Personnel to Influence State Elections. No person, state employee or otherwise, can use public funds, property, or time to assist or participate in a fund raiser or to produce or publish material designed or timed to influence state elections.

A public meeting room or auditorium may be used if the normal fee is charged, the facility is not required for public purposes, and the facility is made available on a first-come-first-serve basis to candidates, political parties or ballot measure committees. A state employee who participates in such activities may not do so while wearing a state uniform or during the hours the employee is officially in work status for a governmental entity.

No newsletter or other mass mailing of promotional material on behalf of an elective officer may be printed or distributed at public expense from the date the officer files a declaration of candidacy through the date of the election for the office. Nor can any communication designed to influence an election for state office or a state ballot measure be distributed or posted in a facility ordinarily used for the conduct of state business.

Exceptions are activities that are part of the ordinary conduct of the governmental entity or for nonpartisan voter registration.

Incidental use of public grounds. The Rules do allow incidental use of public building sidewalks, common grounds, parking lots and areas within public buildings; the handing out of leaflets, brochures, or partisan or nonpartisan campaign materials on sidewalks, common grounds, or parking lots and within public buildings which are not used for the conduct of state government business; or any other activity guaranteed by the Oklahoma Constitution or the United States Constitution.

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In 2003, 38 projects representing 20 different agencies were displayed. *Governor's Commendation Awards* were presented for 34 projects, with six projects also receiving specialty awards. The 2003 projects, when combined, resulted in documented cost savings and revenue generation of more than \$23 million for the State of Oklahoma. A total of \$263,690,249 is documented for the 10 years Team Day has been held.

The deadline for applications is **March 31, 2004**. The easy-to-complete application packet is available at <http://www.opm.state.ok.us/QualityOklaPacket.pdf>. It can be reproduced as needed and distributed to HR staff, field offices, and work teams so that they can gather information for the application process. Additional information about *Quality Oklahoma* may be accessed on the OPM Website at www.opm.state.ok.us/html/hr_hrds_quality.htm. Teams nominated for other awards may also participate in Team Day. If teams choose not to apply for commendation awards, they can exhibit as "booth only" displays.

Those selected for *Governor's Commendation Awards of Excellence* receive an individualized Governor's commendation in a gold foil embossed cover and a coveted Blue Ribbon suitable for framing. Additionally, teams selected for specialty awards receive acrylic awards.

For more information about *Quality Oklahoma* Team Day 2004, please contact Joyce Smith at (405) 522-3617, or Tauheedah Raheem at (405) 521-4539.



"OCSE-157 Report/Performance Measures," by the Child Support Enforcement Division (CSED) of the Department of Human Services, was the recipient of the coveted 2003 "Quality Crown Award," presented annually for the project best documenting the use of Total Quality Management processes. Oklahoma's CSED is one of the few state programs to pass the first and succeeding annual audits required by Congress, which resulted in receipt of more than \$6 million in federal incentive funds, with an additional \$3 million expected for FY 03.

OSEEGIB Plans Pre-Retirement Health Insurance Seminars

From the Oklahoma State and Education Employees Group Insurance Board

Enjoy your retirement years more by you Health Choice. learning about your health insurance retirement options now. Attend one of the upcoming *Pre-Retirement Health Insurance Seminars*, sponsored by the Oklahoma State and Education Employees Group Insurance Board (OSEEGIB), the people who bring

The seminars will be presented on April 2, May 7, and June 4, from 1:00 pm - 3:00 pm at OSEEGIB, Landmark Towers, 3545 N.W. 58th Street, 5th floor Board Room, Oklahoma City, (405) 717-8701 or (800) 543-6044.

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Questions should be directed to the Ethics Commission at (405) 521-3451, or e-mailed to Marilyn.Hughes@ethics.state.ok.us or Rebecca.Adams@ethics.state.ok.us.

Editor's Note: The Ethics Commission (the "Commission") was created by a two-to-one vote of the people of the state per an initiative effort adding Article XXIX to the Oklahoma Constitution ("Article XXIX"). The statewide vote on the amendment (State Question No. 627, Initiative Petition No.341) was held September 18, 1990. Commissioners were sworn in and began meeting in July, 1991.

The Commission is made up of five private citizens, who serve without compensation. One each is appointed by the Governor, President Pro Tempore of the Senate, Speaker of the House, Chief Justice of the Supreme Court and Attorney General. No more than three can be of the same political party. No more than one congressional district may be represented at a time. The agency employs seven full-time staff members who administer the constitutional rules, the Political Subdivisions Ethics Act (the "Act"), and the rules to implement Article XXIX.

The Commission is charged, under Article XXIX, with promulgating rules of ethical conduct, carrying civil penalties, for state officers and employees; campaigns for elective state office; and campaigns for state initiatives and referenda. It is further charged with investigating and prosecuting violations and recommending civil penalties for such in district court. The agency thus drafts the rules and has direct prosecutorial authority over them.

Under Article XXIX, the Commission promulgated rules are presented to the Governor and each House of the State Legislature on the second day of each legislative session. If not disapproved by joint resolution, subject to veto by the Governor during the legislative session for which the rules are submitted, they become effective. In the event the Governor vetoes a joint resolution disapproving the rules, the procedure is the same as for veto of any other bill or joint resolution.

Effective Ethics Commission Rules (the "Rules") are published in the official statutes of the State of Oklahoma (Section 257:1-1-1 et seq. of the Rules of the Ethics Commission, 74 O.S. Supp. 2003, Ch. 62, App.). Effective rules may be repealed or modified by the Commission, subject to the same legislative and gubernatorial action as for newly promulgated rules. Effective

Ethics Commission rules may also be repealed or modified by the Legislature under the same procedures.

The Commission is the repository for state and county campaign registrations/reports and personal financial disclosure statements, as well as state lobbying registrations and reports. It issues ethics interpretations (advisory opinions) on both the Rules and the Act. It also receives citizen information and investigates alleged violations of the Rules or the Act. Rule violations may be prosecuted by the Commission's general counsel in district court. Violations of the Act are referred to the appropriate prosecuting authority.

The Commission office is open Monday through Friday from 8:00 a.m. to 5:00 p.m. It is closed on all state holidays.

—From the Ethics Commission Website
<http://www.ethics.state.ok.us/>

Quality Oklahoma Team Day is May 6.

Kudos

to Oscar B. Jackson, Jr.,
OPM Administrator and Cabinet
Secretary of Human Resources and
Administration, on his January 2004
three-year recertification by the Public
Human Resource Certification Council as
an IPMA-HR Certified Professional
(IPMA-CP). To retain the IPMA-
HR Certification designation, an
individual must accumulate 50 points
every three years and submit a completed
Recertification Report Form. At least
30 of the points must be in professional
development programs and 20 points must
be in other required areas. For additional
information, log on to the IPMA-HR
Website at <http://www.ipma-hr.org>.

What's Wrong With Learning for the Sake of Learning?

Diana Byrd, CEBS, Oklahoma Public Employees Retirement System

Several years ago a friend was recalling a conversation with several moms from her son's school about learning Latin. The mothers were complaining that Latin was archaic, useless, and the children weren't doing very well. As I listened, I agreed with the mothers. Who speaks Latin anyway? Thankfully, before I could respond, my friend wondered out loud, "What's wrong with learning for the sake of learning?"

With that in mind, I embarked on a two-and-a-half year program of self-study known as the *Certified Employee Benefits Specialist Program* (CEBS). I worked in the benefits world, but I didn't know much about the nuts and bolts. I knew a little about retirement, a little more about human resources and compensation, and nearly nothing about health and welfare benefits. What I knew was indirectly learned on the job and usually with little understanding.

The CEBS program is sponsored jointly by the International Foundation of Employee Benefit Plans (IFEFP) and the Wharton School of the University of Pennsylvania. The certification covers the gamut of employee benefits, both public and private. I was particularly interested in the retirement courses because I work at the state



pension system. The daily news at the time was a lesson in itself as I watched hundreds of Enron employees not only lose their future security, but also their jobs. The next set of courses focused on health and welfare benefits. I didn't know the Internal Revenue Service (IRS) cared about how much an employer was paying for parking and transportation benefits. There is, needless to say, much going on in the benefit world. And the IRS cares about it all—a lot.

Learning, continued on page 6



James L. Howard, who will retire at the end of March as Executive Director of the Oklahoma Merit Protection Commission, and I began our career at the State Personnel Board, now OPM, within a couple of weeks of each other—I, to direct the statewide human resource development effort, and he to head up the state of Oklahoma’s Merit System recruitment program—and both of us under the leadership of James C. Thomas, who provided outstanding service to the state of Oklahoma for over ten years as Director of the State Personnel Board and OPM Administrator.

Within two short years of beginning our tenure with the State Personnel Board, Mr. Howard and I were both caught up in the monumental effort to bring significant reform to the four-and-a-half decade old state government personnel system, in the form of Senate Bill 339, which was passed by the Legislature and signed by Governor George Nigh in May 1982. SB 339 established the Oklahoma Personnel Act as the statutory basis for the state Merit System of Personnel Administration, created the Office of Personnel Management as the administrative agency for the state personnel system, and the Ethics and Merit Commission (now the Oklahoma Merit Protection Commission) as a quasi-judicial entity that decides personnel-related disputes.

The purpose of the Oklahoma Person-

Governor Brad Henry proclaimed March 24, 2004, “James L. Howard Day” in the state of Oklahoma. Oscar B. Jackson, Jr., OPM Administrator and Cabinet Secretary of Human Resources and Administration (right), presented the proclamation to Mr. Howard, Executive Director of the Oklahoma Merit Protection Commission, during a retirement reception hosted by MPC.

nel Act was to protect Oklahoma citizens from improper use of authority, protect state government officials and employees from unwarranted assaults on their integrity, and enforce the protections for classified employees and the state’s citizens under the Merit System of Personnel Administration. Under the stewardship of the

Office of Personnel Management and the Oklahoma Merit Protection Commission, which Mr. Howard has led since 1984, the Oklahoma Personnel Act continues to fulfill the purposes upon which it was founded in 1982.

Mr. Howard participated in a variety of activities during his tenure at the State Personnel Board/Office of Personnel Management—in addition to administering recruitment efforts for the state of Oklahoma, he also served as director of Management Services, which includes state employee classification and compensation; director of various special projects, including a classification study for the Department of Human Services; director of a comprehensive review of state agency affirmative action plans and preparation of an annual statistical report on the affirmative action progress made by state agencies; and, finally, as deputy administrator of OPM.

In his role as Executive Director of the Oklahoma Merit Protection Commission, Mr. Howard has directed the statewide employment-related investigation and appeals process that is available to more than 30,000 state employees, and which includes investigations of all allegations of discrimination and other possible violations of laws and rules pertaining to state employment.

In addition, Mr. Howard has served as an adjudicator at administrative hearings

before the Oklahoma Merit Protection Commission; is a nationally certified investigator and Oklahoma Supreme Court Certified Mediator; has developed and taught core classes for new administrative law judges and arbitrators at the Oklahoma Merit Protection Commission; has taught numerous courses for the U.S. Air Force, Job Corps, International Personnel Management Association, and the National Institute for Employment Equity and the Association for Civil Rights; and developed and conducted certification training for Senior Civil Rights Investigators in Oklahoma.

Mr. Howard is certified by the Society of Human Resource Management as a Senior Professional in Human Resources—the highest level of certification granted by the organization—and by the International Public Management Association for Human Resources as a Certified Professional, also the highest level of certification granted by IPMA-HR. He is a nationally certified investigator, and has attended the national judicial college in Reno, Nevada.

During his 20 plus years in state government, he has been a tireless supporter of employment equity and other important human resources issues and of the adoption of state policies aimed at providing equal employment opportunity within the state service. In everything he has sought to accomplish during his service to the state of Oklahoma, Mr. Howard has consistently drawn upon a vast reservoir of experience that is characterized by dedication, effectiveness, and integrity.

And, lest you think that Mr. Howard is relatively new to such lofty and important pursuits, let me share with you that 48 years ago, as a high school student living in Sturgis, Kentucky, Mr. Howard participated in efforts to desegregate the Sturgis public schools. In 2002, he was interviewed for a documentary film, *Living the Story: The Civil Rights Movement in Kentucky*, produced by the Kentucky Oral History Commission of the Kentucky Historical Society. And, in April 2004 he is scheduled to participate in a symposium, *Unfinished Business: School Desegregation in Kentucky*.

Two very different men, but alike in their unwavering dedication to service to the state of Oklahoma. They will be missed!

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After all, most of it is provided on a tax-deferred basis.

The most important lesson I learned was how valuable benefits are. When I was younger, I dismissed retirement as being too far in the future, plus it took more out of my paycheck. Health benefits were rarely used because I wasn't chronically ill. Benefit issues however, have taken on a whole new tenor in our world. They're a huge part of our financial security, both now and in the future. Benefits are a significant part of our total compensation, and for some employers the costs can be as high as 50 percent of payroll. I cringe when I think of what kind of coverage I could afford on my own.

I completed the program in November 2003. Like school children learning Latin, I'm no expert, but I recognize the words and know what they mean for the most part. The self-discipline certainly didn't come naturally. It wasn't always interesting, it was often tedious, and sometimes painful (asset management was the worst). In the end, the rewards far outweighed the work involved. I felt like I had not only accomplished something, but learned a great deal in the process.

OPM Team Member Participates in OSU-OKC Public Service Advisory Board Panel Discussion

Everett Slavik attended the Oklahoma State University-OKC Public Service Advisory Board Panel Discussion on March 2, 2004, on the OSU-OKC campus. The Panel consisted of public service practitioners. Students and faculty asked the Panel questions regarding the benefits and challenges related to public service.

When asked what personality type or quality a good leader should have in order to be successful, Slavik responded, "Individuals must understand that in order to lead effectively they must never put themselves in a position where they can take from the people they are leading or serving."

In regard to his participation Slavik stated, "This forum is a perfect example of how academia and practitioners can team up and work together to prepare future public servants for the challenges that lie ahead of them in public service. It was truly an honor to be asked to serve on the advisory board of my alma mater."



OPM Team members Herman Johnson (left) and Dayna Petete (right) attended the University of Oklahoma's Martin Luther King Multicultural Career Fair on January 28 and 29. Pictured with Mr. Johnson and Ms. Petete is Anne Feher of OU's Career Services Office..

We All Need a Little PEP!

Joyce Smith, OPM

Sam, assigned to the mailroom, did metal work as a hobby. His friend, Bob, worked in the agency sign shop and often complained about the inconvenience of a saw he used that required two men to operate. Sam experimented in his garage one weekend and redesigned the saw so one man could effi-

ciently operate it. Bob and his co-workers tested it and were so impressed, they implemented the new saw immediately. Because this was an implemented idea that saved time, effort, and money and was outside the normal expectations of Sam's job responsibilities, the sign shop supervisor nominated him for a PEP award.

The Productivity Enhancement Program (PEP) is the state's official employee suggestion program. Through PEP, successfully implemented ideas, programs and projects resulting in measurable increased productivity, cost savings, and revenue generation, or which improve safety, efficiency, morale, or services are eligible for awards. There are three types of awards: non-cash, cash, and unit incentive awards.

Non-cash awards can be given for any idea, but usually include improved safety, efficiency, and morale for employees and/or services to customers. Non-cash awards are certificates and lapel pins. This award is presented at the discretion of the agency head.

Cash awards, on the other hand, are awarded for ideas that save money or generate income for an agency. This award is a minimum of 25 percent of the savings generated by the idea and may equal up to \$10,000, paid in a one lump sum payment that does not exceed the actual savings.



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New Recruitment Brochure Targets Bilingual Applicants

Ask any HR professional to describe significant changes in the staffing needs of 21st century employers and they will probably all note the growing need to deliver services to a population that includes many who are unable to communicate effectively in English.

demonstrates what a group of state agencies can accomplish by pooling their resources and working cooperatively." Batty noted that the concept for the brochure came from Ed Sweeney, Personnel Manager, Department of Human Services, but added



Hank Batty and Patty Nelson, OPM, and Ed Sweeney, Department of Human Services, show off the new recruitment brochure.

While many state agencies have worked for years to diversify their own workforce with employees representing a variety of ethnic backgrounds, the focus on employees who can converse easily in non-English languages is relatively new. To assist these efforts, a number of state agencies have pooled their energies to produce a new recruitment brochure targeting bilingual applicants. The brochure, *The State of Oklahoma Wants You*, provides detailed information to bilingual applicants. For each participating agency, the brochure identifies jobs both by titles and specific job codes that need employees with bilingual skills. Also, the brochure lists contact information for the HR office of each participating agency so that bilingual applicants can make contact after having completed the application and testing process through OPM.

"This brochure is significant in a number of ways," commented Hank Batty, OPM Deputy Administrator for Programs. "Obviously, it fills a critical need in the recruitment process for state agencies and provides a useful tool for bilingual job applicants. And, almost of equal importance, it

that the final product also includes the input of a number of agencies, including OPM, Department of Corrections, Oklahoma State Department of Health, Oklahoma Department of Mental Health and Substance Abuse Services, Department of Public Safety, Office of Juvenile Affairs, and Oklahoma Employment Security Commission.

According to Batty, "State agencies that have a need for employees speaking Spanish, Vietnamese, Russian, or other languages should find this brochure invaluable." The brochure was published by the Department of Human Services, but will be available to all agencies through their HR office or from OPM's Applicant Services Division. Questions regarding this brochure may be directed to Herman Johnson, Targeted Minority Recruitment Coordinator, or Patty Nelson, Human Resource Management Specialist, in the OPM Applicant Services Division at (405) 521-2171.



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Awards are made from the agency's budget. The implemented suggestion must be outside the scope of a person's expected job.

Group awards, called unit incentive awards, are given to divisions, work teams, or entire agencies. They are presented for ideas which reduce costs of operations without decreasing the level of services. Cash awards may equal up to 25 percent of the total savings. The awarding of cash awards and unit incentive awards are determined by the State Employee Incentive Awards Committee.

To date, cash awards given to state employees total \$240,597.53. This represents a first year savings total of \$7,477,219.94 accomplished in 27 agencies by 279 employees.

For more information about the PEP Program or to receive packets with nomination forms, contact Joyce Smith, PEP Coordinator, at (405) 522-3617; 2101 N. Lincoln Blvd, OKC 73105; or joyce.smith@opm.state.ok.us.

OPM Releases PMM Report for CY 03

Austin Gilley, OPM

According to OPM's *Pay Movement Mechanism Usage Report*, in 2003, 53 state agencies spent approximately \$4 million on pay movement mechanisms (PMMs) for 3,472 employees.

Agencies are required by law to report all PMM usage to OPM on an annual basis. OPM then compiles this information into the *Pay Movement Mechanism Report*, which this year was presented February 1, 2004, to the Governor and legislative leaders.

PMMs are statutorily authorized methods that give agencies flexibility to grant pay increases to employees in specific circumstances. The *Report* provides information regarding PMM usage, PMM costs, an agency-by-agency breakdown for 2003, as well as projections for the remainder of the fiscal year and next calendar year.

The overall cost for 2003 marks a 5.6 percent increase in PMM usage from 2002, and the projected cost for 2004 is slightly

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more than \$4 million. The pattern of PMM usage during the past few years appears to signal continued budget uncertainties or perhaps the anticipation of a possible across-the-board pay increase from the legislature, according to the *Report*. Most significantly, the *Report* indicates only one agency projects using performance-based adjustments for classified employees in 2004.

The highest projected cost is in market-based adjustments, which appears to signal a change from the cost in 2003 when the use of market-based adjustments decreased 13 percent. In contrast, equity-based adjustments increased 41 percent in 2003—suggesting agencies were more focused on internal pay relationships than on pay relationships with the external market, according to the *Report*.

Overall, the results appear to show that many agencies continue to approach salary administration in a reactive mode, rather than developing compensation objectives, strategy, and plans that are integrated with their operational strategies. The *Report* recommends that agencies should continue to focus on developing and implementing strategic compensation plans that are aligned with and support their missions, business objectives, and goals. Such compensation plans should consider labor market trends and workforce demographics and skills mix, as well as data on recruitment and retention. OPM staff is available for consultation on compensation and workforce planning issues.

The *Report* also recommends that, when funds become available, the Legislature should provide additional funding to agencies for the purpose of targeted pay adjustments for job family levels for which there are critical recruitment and retention concerns. PMMs provide a tool for such an effort, and funding could be designated for use through PMMs.

The *Pay Movement Mechanism Report* can be accessed on OPM's Website at www.opm.state.ok.us under *Did You Know?*

Outstanding undergraduate and graduate student applicants are available through the Carl Albert Public Internship Program. Contact Dayna Petete at (405) 521-6293 for information.

State Employees Pledge Record \$400,000 to Charities

*Erin Brewer, State Charitable Campaign Director
United Way of Oklahoma City*

Through the 14th annual State Charitable Campaign, employees of the State of Oklahoma pledged a record-setting \$402,450 to local and international charities. This represents a five percent increase over last year even though the number of contributors was down by two and one-half percent. The SCC gives state employees the opportunity to contribute at their workplace to approved non-profit agencies.

State employees working in the Oklahoma City area were responsible for the majority of pledges with a total of \$302,811. State employees, once again, demonstrated their spirit of giving by supporting the non-profit organizations in their communities. The agency campaign coordinators very enthusiastically engaged staff in a variety of activities, which is reflected in the increased participation level over last year.

At an awards reception in January, metro area state agencies were honored for their campaign successes. Traveling trophies in three categories were presented for:

- *Most Contributions*—Oklahoma Department of Human Services (\$52,633 pledged);
- *Largest Percentage Increase*—Office of the Secretary of State (743 percent increase);
- *Highest Per Capita Gift Average*—Governor's Office (\$223 per capita).

The additional awards presented for improved contributions included:

- *Bronze Award*—10 agencies (1% - 5% increase);
- *Silver Award*—1 agency (5% - 10% increase);
- *Gold Award*—21 agencies (more than 10% increase).

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Agency coordinators for the 2003 State Charitable Campaign gathered at the headquarters of the Boy Scouts of America-Last Frontier Council on January 23, 2004, for the "Post-Game Endzone Awards" ceremony. Pictured with Howard Hendrick (l), Executive Director of the Department of Human Services and Cabinet Secretary of Human Services, who served as Chairman of the 2003 State Charitable Campaign, are (second from l to r) Bob Spinks, Executive Director, United Way of Metro OKC; Diane Haser-Bennett, OPM SCC Coordinator and member of the State Agency Review Committee (SARC); Mike Wester, DHS, and SARC member; Erin Brewer, SCC Director for United Way of Metro OKC; and Oscar B. Jackson, Jr., OPM Administrator and Cabinet Secretary of Human Resources and Administration, and SARC member.



The SCC is governed by the State Agency Review Committee, a board of state employees that is staffed by OPM. The campaign is managed locally by United Ways throughout the state.

Since the campaign's inception in 1989, state employees have contributed nearly \$3 million to charities.

Beating Expectations

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<http://www.ksg.harvard.edu/>
TheBehnReport*

A while back, *The New York Times* announced across the front page of its business section: "Hewlett-Packard Beats Wall St. Expectations." HP had reported quarterly profits of 24¢ per share—8¢ above its earnings for the same quarter in the previous year and 2¢ above expectations. And this good news created a 9-percent bounce in HP's stock price.

HP had not, however, miraculously solved the slump that plagues the high-tech sector. The unit that makes its acclaimed printers produced quarterly profits nearly equal to those for the previous year. But earnings for HP's Services Group slipped, while the other groups again reported quarterly losses. Collectively, however, these losses were less than the year before.

Hewlett-Packard had not turned itself—and all of its units—completely around. But it had accomplished something that was

Beating Expectations, continued on page 10

During the 2003 SCC "Post-Game Endzone Awards" ceremony on January 23, 2004, OPM received an "Early Bird" Award for completing the 2003 campaign and turning in all pledges by October 23, 2003, and a "Gold Star" Award for showing a ten percent or more increase in dollars raised during the 2003 SCC. OPM's goal was \$7,500.00 and the final total was \$11,608.88—a 287 percent increase over 2002. Approximately 95 percent of OPM employees participated in the 2003 campaign. The OPM SCC Team was comprised of Diane Haser-Bennett, OPM SCC Coordinator, Management Services Department; Robert Clayton, Information Technology Services Department; Frank Friel, Financial Management Services Department; Laraine German, Employee Selection Services Department; Carrie Rohr, Human Resource Development Services Division; Everett Slavik, Management Services Department; and Dayna Petete, Communications Liaison, Office of Communications. During the OPM Team meeting in February, Oscar B. Jackson, Jr., OPM Administrator and Cabinet Secretary of Human Resources and Administration, acknowledged the work of the 2003 SCC Team.



OPM Network Management Services Team member John Schlichting (left) set up the Integrated Computerized Examination (ICE) system in the Pontotoc Technology Center in Ada, Oklahoma, on December 16, 2003. Pictured with Mr. Schlichting are Pontotoc Technology Center staff members (second from left to right) John Anderson, Assistant Manager, Information Systems; Linda Medlock, Director of Student Services; Greg Pierce, Superintendent; and Shirley Wood, Assessment Center Coordinator.

Governor and Commission Co-Sponsor Summit

*From the Oklahoma Commission on the Status of Women
March 24, 2003*

Governor Brad Henry and the Oklahoma Commission on the Status of Women (OCSW) are teaming up to co-sponsor the *Oklahoma Women's Summit* on Friday, April 23, 2004, at the State Capitol.

The Summit's goal is to stimulate changes in state policies and create initiatives to benefit women statewide. It will bring together citizens and business, community and state leaders to address topics and issues relating to women. The Summit's theme is, "Women inspiring hope and possibility."

The summit begins at 9:30 a.m. with remarks from Bernice Mitchell, chair of the Commission on the Status of Women, and Secretary of State Susan Savage. At 10:15 a.m., Governor Henry will deliver the keynote address on the many roles of women in Oklahoma.

During the day, participants may attend breakout sessions to discuss *Women and Children, Women in the Sciences, Women's Health, Elder Care, Women Entrepreneurs and*

Summit, continued on page 19

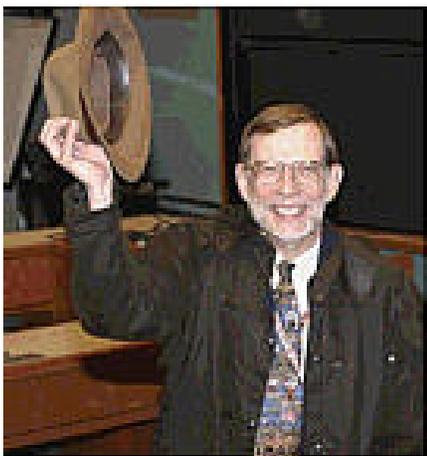
Beating Expectations, continued from page 9

even more important: HP had beaten expectations.

While Carleton Fiorina, HP's chief executive, was announcing this success, she was simultaneously managing expectations for the next quarter. HP wasn't expecting much growth in corporate spending on information technology, she warned. Neither was it expecting much growth in the consumer sector.

Thus, HP cautioned Wall Street not to raise its expectations for the firm's profits during the next quarter. HP was on track, Fiorina told the investment community that evaluates management progress, rates corporate stocks, and establishes expectations. They should expect steady yet slow improvement but not get too exuberant.

Fiorina's performance was masterful. She claimed success for beating past expectations while simultaneously dampening future expectations so that she could beat them again.



Robert D. Behn

Indeed, in business, beating expectations is the name of the game. It isn't how much you earned during the last quarter or the last year. Rather, you and your organization are evaluated in comparison with expectations. If earnings are up, but not up to the expected level, you lose. If your earnings are negative, but those losses aren't as big as expected, you win. Thus, the challenge facing corporate leadership is to establish realistic expectations—expectations that are significant enough to suggest that the firm will make progress but modest enough to be beaten.

The same applies in politics. Don't forget: Senator Eugene McCarthy did *not* beat President Lyndon Johnson in the 1968 New Hampshire primary. McCarthy actually lost. But, in winning 42% of the vote to Johnson's 50%, McCarthy beat expectations. Indeed, he hammered expectations. Politically, McCarthy "won" and Johnson dropped out of the race.

In 1968, McCarthy didn't need to dampen expectations. None of the pundits—politics' equivalent of Wall Street analysts—expected this unknown, poetry-spouting, senator to capture anything but the anti-war, fringe vote against one of the master politicians of the age. For McCarthy, just getting 21% would have beaten expectations.

To win at politics, as every presidential campaign reminds us, the first step is to manage expectations. During the 2000 election, when George Bush debated Al Gore, the Bush team repeatedly reminded journalists that Gore was an excellent debater while their candidate often had trouble with his syntax. When Gore and Bush debated on television and appeared to be equally articulate, Bush beat expectations, and thus he won.

This same challenge—establishing, then beating, expectations—faces the leadership team of every public agency from the Department of Defense to the local school

district. All public agencies have to beat expectations. Before they can do that, however, they have to create these expectations.

For if they don't establish—or, at least, influence—expectations, they are doomed. They will have to match the expectations established by others. And these others—stakeholders, journalists, legislators—have little interest in creating expectations that can be easily met. In fact, they usually have the opposite incentive. Because such outsiders want the agency to accomplish even more, even faster, they inevitably set expectations as high as possible. They do not see creating reasonable expectations as in their interest.

"If we can put a man on the moon, we can certainly . . ." See: There is no reason not to create outlandish expectations. The U.S. military is expected to beat any enemy quickly and without any loss of American lives. After all, we are the sole remaining superpower. Amtrak is expected to run the trains on time and at a profit over tracks owned and maintained by other railroads and through the districts of every influential member of Congress. The Centers for Disease Control is expected to prevent the outbreak of any contagion, even though it can't control the behavior of individual carriers.

Beating Expectations, continued on page 11



On December 12, 2003, OPM Team members welcomed Linda Webb (l), Manager of Communications, Counseling, and Special Projects for the Oklahoma Public Employees Retirement System, who talked about OPERS' two-and-a-half percent "step-up." Pictured with Ms. Webb are Oscar B. Jackson, Jr. (center), OPM Administrator and Cabinet Secretary of Human Resources and Administration, and Patti Ormerod (r), OPM's HR manager.

Nevertheless, the leaders of public agencies can use *performance targets* to mobilize and focus resources. By creating one or two goals that require the agency to significantly ratchet up performance, leaders clearly signal what is important. A performance target gives people something significant to accomplish—a real reason to work both hard and smart. And it rewards people with a clear triumph when they achieve their goal.

The agency's leaders need not, however, announce these targets to the world. The leadership challenge is to set big expectations for internal achievement while creating modest expectations among outside observers. Then, by meeting—indeed beating—expectations, the agency can establish a reputation for effectiveness that can earn it additional flexibility and perhaps even some additional resources.

Robert D. Behn is the author of Rethinking Democratic Accountability (Brookings) and a lecturer at Harvard University's John F. Kennedy School of Government.

As a member of the team of Kennedy School faculty who lead executive-education programs for the public sector, Behn chairs "Driving Government Performance: Leadership Strategies that Produce Results" and "KSG Fridays." He also conducts custom-designed executive programs for public agencies.

Kudos

to the following agency HR professionals who have received the designation of "Certified Personnel Professional" since December 2003:

Marria L. Bratcher
Office of the State Treasurer

Julie D. Jacobs
Department of Mental Health and
Substance Abuse Services
Oklahoma Forensic Center

The CPP (Certified Personnel Professional) designation is awarded to state employees assigned to professional HR positions in the executive branch of state government who attend a four-day training session, successfully complete an examination, and attend a minimum of eight hours of training in professional HR administration each year.

Compensation Review Board Issues Report

Tom Patt, OPM

In February the Biennial Compensation Review Board issued its 2004 Report on state employee compensation. The Board was created during the 2003 legislative session by Senate Bill 194 to make recommendations regarding state employee pay. By law, its membership is comprised of two members appointed by the Governor, two by the Senate President Pro Tempore, and two by the Speaker of the House of Representatives. Current membership of the Board includes:

- *Senate appointees:* Senator Jay Paul Gumm, Chair, and Senator Jonathan Nichols;
- *House appointees:* Representatives Danny Morgan and Ron Peterson; and
- *Governor's appointees:* Al Smith, HR Director, Department of Human Services, and Ron Wilson, HR Director, Oklahoma Health Care Authority.

The Board met three times in late 2003 and early 2004 to consider compensation

issues and information, including data and recommendations, developed by OPM in its FY 04 *Annual Compensation Report*. The Board was also bound by its enabling legislation to make certain recommendations regarding pay band adjustments and targeted pay adjustments. Accordingly, after consideration of relevant compensation data, the Board arrived at the following recommendations:

1. **Adjust the classified pay bands by 6.3 percent to bring them within 95 percent of the market.** This adjustment would affect 1,130 employees whose current salaries are below the minimum, at a cost of \$1.4 million. However, the Board noted that, in light of state agency allocation reductions and budget cuts, a five percent adjustment, as recommended by OPM in its *Annual Compensation Report*, might be more appropriate. This adjustment would affect 1,014 employees and would cost slightly over

Review Board, continued on page 20



On February 27, Oscar B. Jackson, Jr., OPM Administrator and Cabinet Secretary of Human Resources and Administration (right) presented a "Lifetime Achievement Award," to James L. Howard, Executive Director of the Oklahoma Merit Protection Commission, during the 2004 Black Heritage Celebration held at the Omniplax in Oklahoma City. The annual celebration is hosted by the Black Heritage Committee, which is made up of staff members of the Department of Human Services, Oklahoma Tax Commission, Oklahoma Historical Society, and the Oklahoma Arts Council. Sponsors include the Oklahoma Alliance for Civil Rights, Inc., Credit Union One of Oklahoma, Eureka/Ozarka Water Company, Performance Screen Printing, and SATTRN/OU.

Agency HR Changes Since 12/03

Oklahoma Accountancy Board

Kelly Brown
Deputy Director

Department of Central Services

Wendy Simpson
HR Planning Coordinator

Oklahoma Conservation Commission

Russ Halstied
HR Management Specialist
Retired

Department of Corrections

Sharon Smith
Human Resources Assistant I

Employment Security Commission

Melanie Leathers
HR Management Specialist II
Interagency transfer to DEQ

Department of Environmental Quality

Karla Crawford
HR Programs Manager

Melanie Leathers
HR Management Specialist II
Interagency transfer from OESC

Grand River Dam Authority

Ron Coker
General Manager
Retired

Kevin Easley
General Manager

Department of Health

Leanne Beale
HR Management Specialist

Pat Kelly
Staff Development/Training Director
Resigned

Office of Juvenile Affairs

Ida Kirkley
HR Management Specialist
Retired

Commissioners of the Land Office

Martha Perry
Personnel/Human Resources Officer
Resigned

Nina Moser
Personnel/Human Resources Officer

Department of Mental Health & Substance Abuse Services

Sonja Harkey
HR Assistant
Resigned

Debbie Mankin
HR Assistant

Merit Protection Commission

James L. Howard
Executive Director
Retired

Clyde McLendon
Interim Executive Director

Department of Mines

Kelly Brown
HR Management Specialist
Resigned

Elizabeth Sharon
HR Management Specialist

Pardon and Parole Board

Darlene Whaley
Business Manager

Office of Personnel Management

Chanda Graham
Chief Policy Attorney
Office of the Administrator

Jennifer Jepson
CAPIP Executive Fellow
Employee Selection Services Department

James Perez
Management Services Department
Converted from CAPIP Executive Fellow to
Human Resources Management Specialist

Kimberlee Williams
Chief Policy Attorney
Office of the Administrator

Resigned to become DCS Deputy General Counsel

Department of Veterans Affairs

Donna Bowen
HR Programs Manager
Ardmore Veterans Center

Barbara Elliott
HR Programs Manager
Ardmore Veterans Center
Retired

Gary Glover
HR Management Specialist

Pat Ready
HR Management Specialist
Lawton/Ft. Sill Veterans Center
Separated

Sylvester Wielgus
HR Programs Manager
Lawton/Ft. Sill Veterans Center
Separated

OPM Committee Calendar

Affirmative Action Review Council

9/15/04, 10/20/04, 11/17/04,
12/15/04, 1/19/05—8:30 a.m.
Department of Agriculture

CPM Advisory Board

Meets at the call of the chair

Child Day Care Advisory Committee

Meets at the call of the chair

OPM State EAP Advisory Council

4/28/04, 7/28/04, 10/27/04—10:00 a.m.
419A State Capitol

Governor's Advisory Council on Asian-American Affairs

4/30/04, 7/30/04, 10/29/04—2:00 p.m.
Office of Personnel Management
Conference Room G-91

Governor's Advisory Council on Latin-American & Hispanic Affairs

4/26/04, 7/26/04, 10/25/04—2:00 p.m.
Office of Personnel Management
Conference Room G-91

Committee for Incentive Awards for State Employees

Meets at the call of the chair

Mentor Selection Advisory Committee

Meets at the call of the chair

State Agency Review Committee

5/12/04, 8/11/04, 11/10/04—2:30 p.m.
Office of Personnel Management
Conference Room G-91

Oklahoma Commission on the Status of Women

4/29/03, 5/27/03—1:30 p.m.
419C State Capitol
8/26/04, 9/30/04,
10/28/04, 11/18/04—1:30 p.m.
Office of Personnel Management
Conference Room G-91

Note: Calendar subject to change. Call (405) 521-2177 for most recent information concerning OPM Advisory Bodies and other entities staffed by OPM.

For agendas, log on to the OPM Website at www.opm.state.ok.us and open the "OPM Advisory Body Meetings" link under "Quick Links."

3A Memos Since 12/03

OPM 04-16 (3/22/04)

Take Our Daughters and Sons to Work

OPM 04-15 (3/11/04)

Revision to List of Organizations and Policies Approved for State Employees' Voluntary Payroll Deductions

OPM 04-14 (3/11/04)

The Council of State Governments (CSG) 2004 Innovations Awards

OPM 04-13 (3/11/04)

Agency Self-Evaluation of HR Management Practices and Agency Human Resource Management Plan

OPM 04-12 (3/4/04)

Revision to List of Organizations and Policies Approved for State Employees' Voluntary Payroll Deductions

OPM 04-11 (3/4/04)

Governor's Advisory Councils

OPM 04-10 (3/4/04)

Mandatory Supervisory Training Requirement Report

3A Memos, continued on page 13

OPM 04-09 (2/27/04)

Proposed Permanent Amendments to the Merit Rules

OPM 04-08 (2/27/04)

Proposed Permanent Amendments to the Voluntary Payroll Deduction Rules

OPM 04-07 (2/18/04)

Emergency Amendments to the Merit Rules of Employment

OPM 04-06 (2/10/04)

Pay Movement Mechanism Usage Report

OPM 04-05 (2/4/04)

Quality Oklahoma Team Day 2004

OPM 04-04 (1/23/04)

Affirmative Action Plan Utilization Analysis Update Requirement

OPM 04-03 (1/20/04)

State Agency Hiring Freeze

OPM 04-02 (1/6/04)

Calculation of Excess Benefit Allowance

OPM 04-01 (1/5/04)

*Fiscal Year 2003 Annual Report
State Employee Assistance Program*

OPM 03-47 (12/31/03)

Emergency Amendments to the Voluntary Payroll Deduction Rules

Note: All Appointing Authorities Memos are available on the OPM Website (www.opm.state.ok.us) under "Quick Links".

Announcements

On January 16, 2004, Governor Brad Henry announced that he had named Kevin Ward, Commissioner of the Department of Public Safety and Cabinet Secretary for Safety and Security. On January 20, the Governor selected Dr. Joseph Alexander as Cabinet Secretary for Science and Technology. Governor Henry's Cabinet now numbers 14, with only the Education Cabinet post left to fill.

"Take Our Daughters and Sons to Work" Day is Thursday, April 22.

Public Service Recognition Week is May 3 - 9. Wednesday, May 5 is State Employee Recognition Day.

The State Legislature is scheduled to adjourn sine die at 5:00 pm on Friday, May 28.

State offices will be closed Monday, May 31, in observance of Memorial Day.

OPM Administrator and Deputy Attend NASPE Mid-Year Conference

Hank Batty, OPM

Oscar B. Jackson, Jr., OPM Administrator and Cabinet Secretary of Human Resources and Administration, and Hank Batty, OPM Deputy Administrator for Programs, attended the Mid-Year Conference of the National Association of State Personnel Executives (NASPE) in Washington, D.C., January 30 - February 1, 2004.

Each year state personnel directors and their deputies meet to discuss common issues, problems, and opportunities confronting state government HR departments. This year, 27 HR executives representing 21 states and Puerto Rico gathered to share ideas and resources. Not surprisingly, drastic cutbacks, budget shortfalls, and the rising cost of benefits dominated the agenda.

Highlights of the conference included a presentation by Dr. Sally Sheldon, HR Management Faculty Expert, Government Performance Project, regarding the upcoming *Grading the States Report* that will appear in *Governing Magazine* in 2005. This report assigns a letter grade to each state for various functions of state government, including HR management.

Mr. Jackson led a discussion on *HR Architecture*, focusing on how HR shops must strategically align themselves to provide the best services at the least cost of human capital. Marjorie Young, Commissioner, Geor-

gia State Merit System, presented each attendee with a 2004 NASPE *Total Rewards Project* publication, including comprehensive salary and benefit comparisons for the Central and Southeastern states.

According to Secretary Jackson, "The NASPE Mid-Year Conference never fails to provide extremely valuable information that we use to assist in shaping HR policies, procedures, and practices for the State of Oklahoma."

NASPE attendees discussed the 2004 Annual Meeting to be held in Biloxi, Mississippi, July 31 - August 4, 2004. This conference includes formal presentations by nationally recognized HR experts, as well as valuable information and data sharing among attendees.

NASPE is the recognized authority on state government HR issues, trends, practices, and policies and serves as a leader and catalyst for the development of state human resources, and is dedicated to enhancing the image of state public service. The association provides a forum for its members to share information on human resource issues and, collectively, to influence those issues through the conduct of professional research and the participation in various regional and national committees, forums and meetings, so that members can better achieve their states' missions and business objectives.



Members of the National Association of State Personnel Executives (NASPE) gathered in Washington, D.C., January 30 - February 1, 2004, for the 2004 NASPE Mid-Year Meeting. Pictured (l to r) are 2003 NASPE President Sue Roberson, Indiana; 2004 NASPE President Jeff Schutt, Colorado; 2002 NASPE President Mollie Anderson, Iowa; and 1995 President Oscar Jackson, Oklahoma.

Governor Henry Appoints Panel to Examine Mental Illness, Substance Abuse, Domestic Violence

From the Office of Governor Brad Henry
February 19, 2004

A new blue-ribbon task force appointed by Gov. Brad Henry will examine the costs associated with untreated mental illness, substance abuse and domestic violence.

The *Governor's Task Force on Mental Health, Substance Abuse and Domestic Violence* held its first meeting at 1:30 p.m. Thursday, February 19, in the Blue Room of the state Capitol. The group was addressed by Governor Henry, Attorney General Drew Edmondson, and leaders of the Oklahoma Department of Mental Health and Substance Abuse Services (ODMHSAS).

"The toll of mental illness, substance abuse and domestic violence can be staggering on so many levels, from the tragedy of broken families and broken lives to the very real economic costs to society," the Governor said.

"I am excited about the challenging work ahead of this task force. By bringing together experts representing a spectrum of fields, this panel can deduce the extent of the problem and how best to go about countering these ills."

Task force members include:

- Tom Adelson, Oklahoma Secretary of

- Health, Tulsa;
- Dr. Mike Anderson, Presbyterian Health Foundation, Oklahoma City;
- Gov. Bill Anoatubby, Chickasaw Nation, Ada;
- Sue Buck, ODMHSAS board member, Hugo;
- Frank Merrick, Foundation Management Inc., Oklahoma City;
- Mayor Sandra Naifeh, Edmond;
- Robin Parrish, Governor's Office, Oklahoma City;
- Bob Spinks, United Way of Metro Oklahoma City;
- Jeff Tallent, Oklahoma City chapter of the National Alliance for the Mentally Ill;
- Jack Turner, ODMHSAS board member, Oklahoma City;
- Reverend Dick Virtue, Norman; and
- Roger Webb, University of Central Oklahoma President, Edmond.

Ex-officio members include Dr. Terry Cline, ODMHSAS Commissioner, and Joe

Mental Health, continued on page 15



Governor Brad Henry appointed Reverend Dick Virtue (fourth from left) to the Governor's Task Force on Mental Health, Substance Abuse and Domestic Violence. Rev. Virtue has been a member of the OPM State Employee Assistance Program (EAP) Advisory Council since 1995, and has served as chair since 2000. Other members of the Advisory Committee include (l to r) Bob Craig, Jimmy Durant, Delbert Rice, Senator Kenneth Corn, and Steve De Quevedo.

CPM Program Welcomes New Candidates

Carrie Rohr, OPM

The following individuals have enrolled in the Certified Public Manager (CPM) Program since July 1, 2003:

Cosmetology Board

Candis Ross
Sherry Lewelling

Department of Health

Brenda Potts
Mary Sheppard

Insurance Commission

Kathy Haney

Department of Human Services

Ernest Branch
Jackie Huff
Kayla Jackson
Sarah Kennedy
Bruce McDermott
Keith McNickle
Danielle Pelkey
Kelly Pensoneau
Gayle Ramirez
Paul White
Sam Whitfield

Office of Juvenile Affairs

Darrin McDaniel
Robert Morey
Dee Ann Paisley
Brett Fitzgerald
Stacy Lee Hall
Everett Shaw

In 1986, OPM created the CPM Program as a comprehensive management-training program for state government employees. The Legislature made the CPM Program statutory in 1995. The CPM Program is designed to improve service to the citizens of the state of Oklahoma. Participants in the program become better resources for their agency and for the state through seminars, examinations, job-related projects, and by enhancing their management skills. The long-range goals of the CPM Program include helping agencies identify and develop the skills of Oklahoma state government's future leaders.

The CPM program was first accredited by the National Certified Public Manager Consortium in 1988, and received continued accreditation in 1993 and 1998. Oklahoma is one of 21 states accredited by the Consortium.

Currently, 271 candidates are enrolled in the CPM Program; 318 individuals have graduated from the Program since 1988.

Hight, *Daily Oklahoman* managing editor.

Experts note that untreated or under-treated mental illness, substance abuse and domestic violence concerns are directly linked to increases in fatalities and suicides, incarcerations, welfare rolls, teen pregnancy, unemployment and numerous other issues that ultimately cost Oklahoma taxpayers.

Dr. Cline said the task force, which in December will release a report of its findings, will help determine the most cost-effective manner to direct resources in these three areas.

“The task force will study the spectrum of costs associated with mental illness, substance abuse and domestic violence,” he said.

“I think the task force will find there are incredible costs associated with these three areas. Most people are not aware of the associated cost, so this will shed some light on the expense to the state—both the public and private sectors. In 1998, a similar task force, which studied only the costs of untreated substance abuse in Oklahoma, found that substance abuse alone costs our state nearly \$7 billion a year.”

OPM Releases FY 03 EEO/AA Status Report

Brenda Thornton, OPM

In compliance with Section 840-2.1 of the Oklahoma Personnel Act, OPM has released the *Oklahoma State Government Equal Employment Opportunity/Affirmative Action Status Report*, which covers the reporting period from July 1, 2002, through June 30, 2003. You may access the report on the OPM Website (www.opm.state.ok.us) under *Did You Know?/OPM Releases FY 03 EEO/AA Status Report*.

Highlights from the report indicate that:

- The state of Oklahoma’s workforce consisted of 33,436 employees in the 110 reporting agencies, boards, and commissions, a decrease of 1,039 state employees (-3.014 percent) from the 34,475 reported as of June 30, 2002.
- There was a decrease of 141 minority employees (-2.073 percent) from 6,801

Status Report, continued on page 18



OPM Team member Patty Nelson (l) works on HR issues with Gerry Tomlinson, Human Resource Manager, Southern Oklahoma Resource Center of Pauls Valley, Department of Human Services. Ms. Nelson is an HR Management Specialist in OPM’s Applicant Services Division.

Employee Management: Dealing with Personnel Issues that Bump in the Night

James Black, IPMA-CP

Reprinted with permission

December 2003 IPMA-HR News

Some years back my job brought me in contact with dangerous people. I was involved in negotiating the release of hostages on three occasions and I talked to criminals many times, even while they were in the midst of committing violent crimes. At that time I was a crisis counselor—one of the most experienced suicide prevention hotline counselors in the country.

As my career path shifted, I didn’t forget the lessons I learned in crisis counseling. I used this experience when I transitioned into administration and human resources in a very large public sector organization. Because of my counseling experience, I was assigned to resolve a myriad of difficult, “emotionally loaded” personnel situations. I was involved in at least 300 discipline cases, “downsizings” and terminations—all in an adversarial labor relations climate—and in a number of other situations involving disturbed people, alcohol or drug problems that required specialized skills. I worked on several joint investigations involving law enforcement investigators. Twice I was the administrative representative at pre-dawn tactical police raids and was on the scene as

heavily armed and armored law enforcement personnel took our employees into custody. I was commended for resolving issues, including highly contentious disciplinary cases, while achieving an extraordinarily low rate of grievances and appeals.

Now, I am a human resources manager at a special district in California. I am no longer qualified to act as a counselor and I don’t purport to be one. I don’t speak or understand the latest psychological terminology. I am a hands-on HR practitioner and I am no more “touchy-feely” than the next practitioner. From time to time I train HR people on strategies for dealing with adversity and I borrow a few tips from my prior experience. This article includes some tips from my prior career to provide readers with additional tools and improve their comfort level in approaching difficult situations.

The Nuts and Bolts of Your Relationship to Your Employees

It is important to understand the nature and dynamics of your relationship to

Employee Management, continued on page 16

your employees. When you are in the position of evaluating people or are involved in the process of granting raises, making employment selections or other such activities, you are making decisions that impact an individual's sense of self-worth. When you engage in these tasks you take on certain rewards and risks. The risks are, in most situations, acceptable and normal.

But put simply, HR staff is seen as provider and/or the withholder of well being. This can lead to primitive emotion, especially in the cases where employees may feel that their livelihood is threatened. Sometimes, given certain individuals and certain conditions, primitive emotion can escalate to aggression. While the risk of actual violence is statistically low, it can increase when other stabilizing forces factors in one's life, like relationships and family, become unbalanced. Career and relationship are the two important stabilizing forces in most lives. When either goes bad, the individual has fewer resources for coping.

So, given my experience, what do I watch for? Among many things, I look for factors that might push someone over the edge—especially the factors in which an employer might legitimately intervene. I have a good idea of how people on the edge sound and what one might expect. I have counseled “edgedwellers,” including one man just hours before he murdered his family. He was likeable, highly successful in his profession (a command-level military officer) and

devoted to his family. Even so, it was clear to me that he was headed toward a significant precipice if additional stressors were added into his life, and the stressor was out there—his wife was having an affair.

I energized all of the available resources of the suicide prevention agency, but we were unable to learn his name or prevent a tragedy (caller ID and other such technologies were in their infancy). He skipped his appointments for additional telephone counseling sessions as he had apparently been successful in persuading his wife (they were separated) and son to spend Christmas Eve together as a family. Instead of talking to us, he murdered his wife, son and brother-in-law. While I don't know definitively, I believe I know the factor that pushed him over the edge. I think that he finally and tragically accepted that his wife's love affair was not just a fling.

It was the straw that broke the camel's back. The dynamic is similar in the workplace—especially for men. It is ironic that men can sometimes cope with the loss of a relationship more easily than they can cope with the loss of a job (this happens frequently in alcoholism).

Bosses from Hell

We can all identify Bosses from Hell (BFH) when they are our *own* superiors. The characteristics that come to mind are loud voices, bullying and personal attacks, along with other demeaning behavior and blaming others for the BFH's own mistakes. I am particularly concerned about the BFH

phenomenon. Not only are employees of BFH more likely to file complaints, grievances and lawsuits, they might be pushed into aggression by demeaning BFH behavior.

One of my colleagues once told me a story about working for a bully. One day he was approached by a co-worker, “Joe,” who was wearing a three-piece suit, which was very uncharacteristic in the casual business dress environment of this work group. Joe showed my colleague a .45-caliber pistol and said, “I know you will understand I can't take it anymore. I got to do it to him before he does it to us.”

Joe was talking about shooting his BFH supervisor. My colleague had good instincts, and he listened. After a time he told Joe that he wasn't in Vietnam anymore and that he needed to think it through—that this approach was not going to help his life and he had a lot of other options that were better, including finding another job.

The last part of this story is something that should motivate us all to intervene in BFH situations: instead of warning the BFH supervisor and co-workers, my colleague admitted that he feigned illness and left work. He called in sick and watched the news for two days, waiting to hear about Joe. At the time my colleague did not think it was worth placing himself at risk to aid a despicable superior. Fortunately, Joe didn't follow through with his plan for violence. He took my colleague's advice and found another job. I wonder how often similar events unfold without incident. It is my sense that for every incident of workplace violence, there are hundred or thousands of fantasies, and a few individuals who act out the fantasy to the extent that they come to work prepared for violence. Sometimes a tiny kindness can distract a dangerous fantasy.

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Two OPM Team members were on hand on January 13, 2004, when Oklahoma native and country music superstar Toby Keith was named “2003 Oklahoman of the Year.” Oscar B. Jackson, Jr., OPM Administrator and Cabinet Secretary of Human Resources, and Dayna R. Petete, OPM Assistant Administrator for Communications and Legislative Liaison, attended the ceremony which was sponsored by “Oklahoma Today” magazine. Mr. Keith's accomplishments and contributions to the state were acknowledged by Governor Brad Henry, Commerce and Tourism Cabinet Secretary Kathryn L. Taylor, and Tourism Commissioner and musician (and former OU basketball great) Waymon Tisdale.



State agency HR staff members who volunteered to assist with user acceptance testing prior to “go-live” of the HRMS portion of the CORE/PeopleSoft system gathered at OPM on January 12, 2004, to discuss the project. The role of these individuals will be to check data in the new system against the data in the existing State Personnel and Payroll systems.

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Keep Your Organizational Fences in Good Repair

“Organizational fences” is a term I use to describe the norms of conduct at the workplace and in various work groups. All HR professionals are concerned when the norms of conduct include discriminatory joking or remarks. We put up fences to discourage people from engaging in this conduct. I encourage you to be just as diligent in watching for work groups that tolerate acting out (disruptive behavior), instigating (manipulating others), negative leadership, hazing, aggressive behavior and/or intimidation. These acts might be harbingers of other worrisome aberrant behavior. Taut organizational fences limit these behaviors before they have a chance to escalate to aggression.

This isn't to say that work should be all work and no play. The workplace has plenty of room for fun, camaraderie and good humor; it is just that these activities should not come at the price of another's self-respect. These boundaries should be clear and those who stray beyond the limits should be encouraged back with measured responses. This is particularly important to individuals who are less stable, or those who are involved in situational crises. Please remember that while it is important to have compassion and be humanistic, individuals should be held responsible and accountable for their actions when they cross the fence and engage in dysfunctional workplace behaviors.

I once worked as a counselor in a residential facility for emotionally disturbed adolescents. One of the things that set these



kids apart from others was their difficulty in shifting gears and de-escalating their behavior when things had gone too far. Among ourselves we described these kids as not having an “off” switch. There are many different types of emotional or psychological impairments that have impaired “off” switches and similar problems with calming down. These employees may be among your most productive and best workers, until the work group behavior strays beyond the bounds of the organizational fences and their focus drifts. For some, once they cross over the norm it is a difficult and painful struggle to readjust. Keep your fences in good repair.

Shifting Perspectives

Human resources professionals are, of necessity, logical, analytical and methodical. It comes with the job. But these functions primarily involve one hemisphere of the brain, the left brain in most people. Sometimes the rational part of the brain does not supply the whole picture. In the case of the Christmas Eve murderer described above, there was nothing in his words that clued me into his risk for violence against others. I was trained to profile and assess risk based upon data, all left-brain functions. According to the profiling information, he was a moderate-high risk for suicide. He

did not even admit that he had access to a gun and he said none of the things that might raise one's concern. But in this case, the caller's potential for violence was telegraphed not by his words, but in the way he said things—the emotion behind his story. His desperation and denial were evident, but I sensed that primitive emotions lay beyond his words and beyond his control.

We all have the ability to sense risk. If you think about it, you would not be alive if you had not come from a long line of ancestors who were successful at identifying dangerous people. We know it in our feelings, in our guts.

My closing piece of advice is to train yourself to be nimble in shifting perspectives from rational to emotional or “gut” feelings. Both are useful, but learn to be intuitive and trust the feelings when you are worried about the potential for emotionally charged situations. If you have time, sleep on it and talk it over with colleagues. Put your unconscious mind to work on it. Failing that, take deep breaths and close your eyes while you consider. Give yourself a few moments to orient to the darkness and ask yourself questions about the situation. This is a technique that I used

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on the suicide hotline. I often closed my eyes when concentrating on the voice of a hotline caller and I find that it is still a very useful technique, especially when I mentally “replay” worrisome interactions. When you have considered the situation after shifting perspective, you may gain a totally new insight into how to proceed.

With all of this being said, you are probably at a much greater risk of danger when you stop at a convenience store at night to pick up a quart of milk. You should be reassured that it is very likely that a potentially violent person will talk openly to someone and leave reportable clues. It is our job to work hard to create an organizational culture where employees feel responsible to each other, to management and to their elected officials. Challenge your employees to be part of the solution in a workplace that fosters mutual regard and respect.

Tips and Techniques for Reducing Adversity

1. When in doubt, talk it out. If an interaction is bothersome, don't be afraid to talk about it with a trusted, levelheaded colleague(s). If you are embarrassed that your concern may be misguided, talk it over anyway. Denial is a very powerful and natural human quality. A colleague once told me about a strange event that happened while he was interviewing a troublesome employee. While he was talking to this employee, who was slated for layoff, a strange man appeared at the door of my colleague's office. The troublesome employee pointed at my colleague and said to the stranger, “*This is the guy I was telling you about, remember him.*”



Mandatory supervisory training reports for January 1, 2003, through December 30, 2003, are due April 30, 2004. Call Carrie Rohr or Grayson Bedwell, OPM Human Resource Development Services Division, at (405) 521-6334, for more information.

OPM HR Manager Patti Ormerod (l) won a scavenger hunt sponsored by Oklahoma City radio station KXXY. The prize? An invitation-only concert with country music star Clint Black (center). After the concert, which only 106 people attended, the sponsors conducted a drawing and seven lucky winners (including Ms. Ormerod!) had a chance to meet Mr. Black and have their picture taken with him. Also pictured is another state employee, Michelle Toliver (r) of the Oklahoma State and Education Employees Group Insurance Board.



My colleague was reluctant to talk about it (he said it was silly), but I heard his story and called an impromptu staff meeting. None of the rest of us thought it was silly. Upon investigation, the sheriff didn't either. The troublesome employee was a wanted criminal with an outstanding warrant for assault and battery.

2. Involve the peer group in the rating when promoting from within. Peer opinions can be particularly useful in ferreting out potential *Bosses from Hell*. First obtain permission from the candidates (our unions have not objected after we explain how much we wish employees to have input into a selection) to engage in peer ratings on the promotional candidates. We ask peers to rate colleagues on a series of issues. The rating form typically begins with something like, “In the order I have ranked, these persons would make good candidates for promotion to (X) because...” and continues with statements like the following (and a rotating rating matrix of names):

- ...their work habits are a good example to us all.”
- ...they treat everyone with respect and courtesy.”
- ...they are honest and they will do what is right for the agency even if it is contrary to their own interests.”

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F.Y.I.

The Oklahoma Alliance for Civil Rights, Inc. is hosting “Investigator Training for Complaints of Discrimination,” April 20 - 23, 2004. Contact Barbara Williams at (405) 557-7255 for more information.

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in FY 02 to 6,660 in FY 03.

- Overall female representation remained at 55 percent of the state government workforce even though raw numbers indicate a 2.99 percent decrease from 18,949 in FY 02 to 18,383 in FY 03 (-566 employees).

Through affirmative action, equal opportunity, and targeted minority recruitment efforts, state government continues to make progress overall proportionate to the employment of minorities and females.

The continued affirmative action goal of Oklahoma state government is to achieve a workforce that is truly representative of every racial, ethnic, and gender group in Oklahoma. This report reflects progress toward that goal.

If you have questions or desire additional information, contact Brenda C. Thornton, OPM Director of Equal Opportunity and Workforce Diversity, at (405) 521-3082, or brenda.thornton@opm.state.ok.us.

...they do not let their anger, frustration or other strong emotions interfere with their work.”

...they can see both sides of an issue, they are open-minded, and willing to listen.”

Not only does this approach give you valuable data on how the candidates are viewed by their peers, it sends a message to the peers that you value their opinions. Moreover, it telegraphs the types of behavior that are taken into consideration in making promotional decisions.

3. Get ratings from supervisors and managers when you are concerned about negative behavior in a work group, or if you are involved in layoffs or adversarial situations, ask the immediate chain-of-command supervisors and managers to rate all of the employees in the group. Ask them to rate the most-to-least-valuable employees, regardless of position or places on your organization chart. Have them rate the employees who are the best role models, positive leaders, best citizens, etc., to the least valuable on the same continuum. Have dialogues with the supervisors about the factors that influenced their ratings (observed behavior and other impressions) with special emphasis on the employees and the behavioral factors observed in the lower rated groups. Involve the supervisors in developing strategies to reward the best behaviors identified and to discourage the counterproductive behaviors.

4. Obtain intelligence before you act. This is particularly important when you are working with work groups with which you are unfamiliar. Ask the supervisors general questions about the groups' overall morale, whether anyone has undergone recent dramatic changes (remember that spouses, former boyfriends and family members have been responsible for acts of violence at the loved-one's place of work), etc., and then ask questions like:

“If you had the ability to persuade one person in this group to get help from employee assistance, who would it be?”

“Have any co-workers expressed concern about anyone's well being?”

“Have any co-workers expressed that they are uncomfortable around anyone?”

5. If you identify disturbing behavior patterns, ask supervisors and potential witnesses direct questions about the identified behavior, including whether anyone felt intimidated or threatened by another's behavior and to what extent they have been associated with weapons or dangerous situations in the past.

IPMA-HR has developed a *Center Series* packet related to this topic that includes a document, “Developing an Effective Plan to Prevent Violence in the Workplace,” which suggests the adoption of a no-tolerance policy for threats and the following:

- Management commitment and employee involvement. This includes goals for workers in small establishments or written programs for larger organizations.
- Worksite analysis. Identifying high-risk situations through surveys, walk-throughs and reviewing injury/illness data.
- Hazard prevention and control. This includes changing the physical structure of the workplace to limit access, and administrative and work controls to limit violent incidents. This could include physical barriers, alarms, panic buttons and

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Business Owners, Women in the Executive Suite, Preparing Women for the Workforce, Women Affecting Public Policy, Women Networking Together, and Women By the Numbers.

At 3:00 p.m., the Summit's plenary session will focus on the hearings, findings and recommendations of the Commission's *Task Force on Women Incarcerated*. The Summit will adjourn by 4:30 p.m.

The \$10 registration fee includes a box lunch served in the Capitol Rotunda. Registration forms are available on the OPM Website at www.opm.state.ok.us, by e-mailing ocsw@opm.state.ok.us or okwomen.summit@sbcglobal.net, by calling (405) 522-6897, or by writing the Oklahoma Commission on the Status of Women, 2101 N. Lincoln Blvd., Oklahoma City, OK 73105-4904. Checks should be made out to OCSW/Summit '04.

Editor's Note: The Oklahoma Legislature created the OCSW in 1994 to act as an advisory entity on equity issues relating to gender bias; monitor legislation to determine whether it is discriminatory toward one gender or the other; act as a resource and a clearinghouse for research on issues related to women and gender bias; report annually to the Governor, President Pro Tempore of the Senate, and Speaker of the House of Representatives regarding its activities; and make recommendations concerning needed legislation or regulatory changes relating to equity and gender bias. OPM provides staff support to the OCSW.



Gladys Bennett, Oklahoma Historical Society, and Marsha Reeder, OPM Financial Management Services Department, discuss proposed amendments to the voluntary payroll deduction rules during the rules hearing hosted by OPM on March 18 in the Concourse Theater.

working in teams.

- Training and education. Educating employees about the risks and ways to protect themselves.

Readers may access information on *Workplace Violence III* from the *HR Center Series* at www.ipma-hr.org/files/cpr_wv3.pdf.

Jim Black, IPMA-CP, is currently the human resources manager of Vista Irrigation District in California. He began his career as a crisis intervention counselor and then worked as a human resources professional in both large and small public sector environments for 13 years. He has served on the board and as president of the San Diego chapter of IPMA-HR. Jim is a published and award-winning writer of fiction.

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\$1 million. This cost was deemed to be within the realm of possibility for state agencies to absorb.

2. **Provide targeted pay increases** to employees in 262 job family levels which were identified by OPM as being 15 percent or more below the market. The cost of this adjustment was estimated to be \$132.3 million. The Board further recommended that the Legislature consider ways to fund these increases contingent upon the availability of monies.
3. In the area of **fringe benefits**, the Board recommended three actions:
 - Consistent with availability of funds, OPM should conduct a benefit value analysis to determine market competitiveness of benefits.
 - Children of state employees should be granted a 50 percent tuition waiver at state colleges and universities.
 - State employees currently under the Rule of 90 for Normal Retirement Date be placed under the Rule of 80.
4. OPM should track relevant **turnover** data and, where appropriate and possible, compare it with market turnover rates. In addition, a statewide exit interview survey should be developed to assist in assessing the causes of turnover.

The Board was unanimous in its support for the above recommendations. The Board will convene again in two years.

Supreme Court Says Legal To Favor Older Workers Over Younger Ones

*Reprinted with permission
March 5, 2004, IPMA-HR "HR Bulletin"*

The United States Supreme Court ruled 6-3 that younger workers cannot sue under the Age Discrimination in Employment Act (ADEA) when favorable treatment is given to older workers—also known as a “reverse discrimination” suit. *General Dynamics Land Systems Inc., v. Dennis Cline et al.*, Docket No. 02-1080, February 24, 2004.

General Dynamics Land Systems, a defense contractor headquartered in Sterling Heights, Michigan, was faced with rapidly increasing retiree health benefits costs. In response, the corporation and the union entered into a collective bargaining agreement to limit the benefit. Only current employees who were age 50 in 1997 would be eligible to receive health benefits in retirement.

Dennis Cline and other workers who were over age 40 but under 50, sued under the federal Age Discrimination in Employment Act (ADEA). The ADEA protects workers over age 40 from employment discrimination. Cline reasoned that since he was over 40, he fell within the meaning of the law.

The Equal Employment Opportunity Commission (EEOC) agreed and urged General Dynamics to settle the suit. But the parties were unable to reach agreement. The Sixth Circuit Court of Appeals ruled in favor of Cline finding that the ADEA protects workers over age 40 and that the plaintiffs fit that category.

The Supreme Court reversed. According to the Court, the law’s “structure, purpose, history, and relationship to other federal statutes show that the statute does not mean to stop an employer from favoring an older employee over a younger one.”



Rick Resetaritz, Department of Human Services; Diane Haser-Bennett, OPM; and Gale Lawrence, Office of Juvenile Affairs; at the March 18 rules hearing.



OPM Team member Joyce Smith (standing) interacts with participants in the “Business Etiquette” class offered by OPM’s Human Resource Development Services Division. The Spring 2004 HRDS semester began March 8 and will end June 18. HRDS is offering over 150 sessions on 60 topics this semester.