
National Partnership Council

A Report to the President on Progress in Labor-Management Partnerships

December 1997

“Getting Results Through Labor-Management Partnerships”

NATIONAL PARTNERSHIP COUNCIL



December 31, 1997

Dear Mr. President:

On the fourth anniversary of your Executive Order 12871, "Labor-Management Partnerships," we are very pleased to present the National Partnership Council's *1997 Report to the President on Progress in Labor-Management Partnerships*.

For the last four years the Council along with the thousands of workers who actually make partnerships happen, has been working hard to change the culture of Federal labor-management relations. As you know, your Executive Order 13062 renewed the Council's commission until September 1999. The Council continues its dedication and commitment to partnership as it fulfills its charge to support the creation of labor-management partnerships; promote partnership efforts in the executive branch; collect and disseminate information about partnerships; provide guidance on partnership efforts in the executive branch, including results achieved; and advise you on matters involving labor-management relations in the executive branch.

The Council has met with hundreds of Federal labor-management partners and heard their views on partnerships in the Federal Government. This report presents the Council's findings regarding the status of partnerships, the Council's activities in support of partnership over the last year, the results partnerships are achieving, and the importance of evaluating partnership efforts. As outlined in the Road Ahead, the Council stands ready to assist partners as they measure the results and benefits of partnership. The Council's 1998 strategic plan outlines its plan to provide more hands-on skills building opportunities in the areas of relationship development, strategic planning for partners, and partnership evaluation.

We are pleased to report that partnerships which are continuing to thrive throughout the executive branch, are successfully confronting the challenges and opportunities that are facing Federal agencies and departments. From strategic planning to evaluation efforts, labor-management partnerships are getting results and making a difference in the lives of organizations, managers, and employees.

With your continued support and that of the Vice President, the Council looks forward to getting further results through labor-management partnerships.

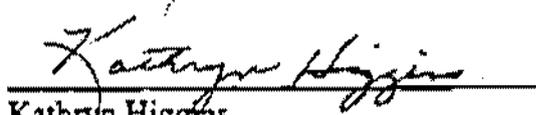
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Office of Personnel Management



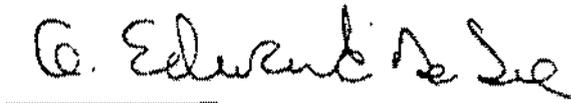
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National Federation of Federal Employees



Kathryn Higgins
Department of Labor



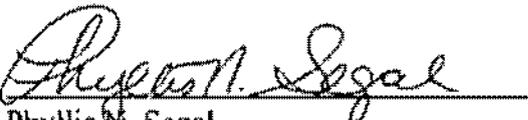
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National Treasury Employees Union



G. Edward DeSeve
Office of Management and Budget



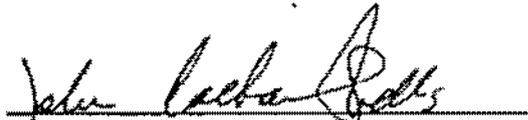
John F. Leyden
Public Employee Department, AFL-CIO



Phyllis N. Segal
Federal Labor Relations Authority



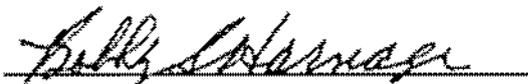
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Federal Managers Association



John Calhoun Wells
Federal Mediation and Conciliation
Service



Carol A. Bonosaro
Senior Executives Association



Bobby L. Harnage
American Federation of Government
Employees

Table of Contents

Overview	1
Section I - The Year in Partnership	3
A. Leadership Initiatives	3
National Partnership Council	3
Federal Labor Relations Authority	6
Federal Mediation and Conciliation Service	8
Department of Defense Field Advisory Services	9
B. Perspective from the Workplace	11
The Climate	11
The Issues Facing Partnerships	15
Stage I: Creating Partnerships	16
Stage II: Overcoming Sticking Points	17
State III: Maintaining an Effective Partnership	17
Section II - Getting Results Through Partnership	19
A. Improving the Way Government Does Business	21
Strategic Planning	22
Illustrations for the Practitioner	23
Reinvention	25
Illustrations for the Practitioner	26
B. Developing Human Resources	31
Performance Management	31
Illustrations for the Practitioner	33
Workplace Flexibilities	39
Illustrations for the Practitioner	40
C. Managing Change	45
Illustrations for the Practitioner	46
Partnership, Organizational Change & Effective Government	50
Section III - Evaluating Partnership Efforts	52
Section IV - The Road Ahead	56

Overview

For more than four years, labor and management have been teaming up in an attempt to move beyond the traditionally adversarial labor-management relations environment. The efforts of these partners are paying off as they are getting results through partnership. These results not only improve the way government does business, but also indicate improvements in quality, service, and job satisfaction.

Following the governmentwide approach to labor-management relations outlined in Executive Order 12871, *Labor-Management Partnerships*, labor and management partners across the country are tackling more non-traditional labor-management relations issues and achieving positive results.

Partnership continues to be a strong force in Federal labor-management relations. Almost 80 percent of the respondents to the 1997 Federal Sector Labor-Management Relations Climate Survey indicated that a partnership council or agreement has been established in the bargaining unit with which they are affiliated.

The success of partnership, including the partnerships mentioned in this *Report*, is the result of the efforts of many. The National Partnership Council, along with other groups, continues to demonstrate its commitment to promoting partnership, especially in those executive branch organizations where labor and management are struggling to comply with the Executive Order. In helping these partnerships overcome barriers, the Council hopes to encourage labor and management to use partnership as a positive force in managing change, improving the way the Government does business, developing employees, and achieving results.

Labor-management partners are addressing a range of issues. Strategic planning, reinvention, performance management, and workplace flexibilities are becoming familiar topics in partnership discussions. Partnerships are

“Only by changing the nature of Federal labor-management relations so that managers, employees, and employees’ elected union representatives serve as partners will it be possible to design and implement comprehensive changes necessary to reform Government.”

Executive Order 12871

The Year in Partnership

A. Leadership Initiatives

Since it was created in October 1993 by Executive Order 12871, the National Partnership Council has focused on fulfilling its lead role to foster labor-management partnerships within the Federal Government. As partnerships continue to form and develop throughout the Federal community, other organizations, such as those providing training and intervention, are also contributing to building partnerships. Organizations highlighted in this section include the National Partnership Council, Federal Labor Relations Authority, Federal Mediation and Conciliation Service, and Defense Field Advisory Services.

National Partnership Council

The primary responsibilities of the National Partnership Council (NPC) are to support and promote effective labor-management partnerships; collect and disseminate information about partnership efforts with emphasis on results achieved; provide guidance on partnerships; and advise the President on the state of labor-management relations in the Federal Government. The Council collects and disseminates partnership information, models, case studies and tools through the National Partnership Clearinghouse, which is housed at the U.S. Office of Personnel Management and may be reached by calling (202) 606-2940.

The NPC was created to enlist the Federal labor-management relations program as a key ally in reinvention to refocus Federal labor relations from its tradition of adversarial litigation to cooperative problem solving. Toward that end, the Council carries out a number of programs to support and promote effective labor-management partnerships. Since 1995, the annual National Partnership Awards have showcased more than 25 partnerships and recognized their success in such

their challenges and improve evaluation of effectiveness of partnerships. Second, responding to requests from a number of working-level partnerships, the Council implemented the Facilitation Project to work directly with partnerships facing challenges. These groups exist at various stages of the partnership relationship and at all levels of Federal agencies. Fourteen participant groups were selected based on joint labor-management recommendations. The Council worked with several of these partnerships to link them with available resources and, in October 1997, sponsored a skills-building workshop in conjunction with Cornell University.

Recognizing the overarching challenge to partnership caused by turnover of top-level leaders, in 1997 the NPC reinvigorated its commitment to collaborate with senior-level Government officials. The Council especially targeted those agencies not represented on the Council through the President's Management Council (PMC), the Interagency Advisory Group (IAG) Network on Partnership and Labor-Management Relations, and the Federal Executive Boards (FEBs). To strengthen links with career middle managers, the Council held its March 1997 meeting in conjunction with the 59th National Convention of the Federal Managers' Association, attended by more than 200 managers from across the country. On December 3, 1997, the NPC met with the PMC and began an ongoing dialogue in which both groups recommitted themselves to fully implementing Executive Order 12871.

Agency labor relations officers from the IAG Network on Partnership and Labor-Management Relations participated on NPC joint labor-management committees such as the National Partnership Awards committee and the Facilitation Project team. This crossover and collaboration with agency labor relations officers is one avenue the Council is using to promote and institutionalize labor-management cooperation. The FEBs were instrumental in providing leadership and assistance in setting themes and in recruiting local Federal stakeholders to participate in Council activities outside of Washington, DC.

FLRA in the Field

◆ The Immigration and Naturalization Service and the American Federation of Government Employees representatives throughout the United States received assistance from the FLRA to develop partnerships in district offices and border patrol sectors.

◆ Unfair labor practice cases appealed to the Authority were resolved with facilitation assistance that helped the parties craft an alternative work schedule program that was adaptable to the unusual work requirements of the agency.

◆ The FLRA's OGC worked with the Department of Health and Human Services (HHS) National Partnership Council to resolve the myriad number of representation issues affecting nationwide bargaining units and over 20,000 employees that resulted from the HHS national reorganization. It is estimated that the collaborative approach enabled HHS to avoid spending approximately \$400,000 on more traditional, adversarial proceedings.

partnership principles to help targeted "high filers" of unfair labor practice charges, resolve their disputes, avoid future disputes and improve their relationship.

In addition to these efforts, the OGC has issued policies and guidance useful to partnerships. For example, the Facilitation, Intervention, Training and Education (FITE) Policy describes the principles and criteria that the OGC follows when working with the parties and delivering training or educational services to further collaborative relationships and dispute resolution. Pre-decisional involvement (PDI) refers to activities where employees, through their elected exclusive representative, are afforded by agency management the opportunity to shape decisions in the workplace that affect the work the employees perform. The OGC's PDI policy examines the benefits and risks and the relationship between PDI and the statutory duty to bargain. The policy also presents a model that parties can use to structure their own process.

Department of Defense Field Advisory Services

The Department of Defense Field Advisory Service (FAS) Labor Relations Branch is an active participant in the Department of Defense Partnership Council (DPC). As the administrative arm of the DPC, FAS conducts extensive labor-management cooperation training and facilitation. This year, training objectives have moved to a higher level. In addition to partnership, interest-based problem solving and mediation training done previously, FAS has now embarked upon joint training initiatives with its union partners. These efforts involve not only joint planning, but joint resource investment as well.

This year FAS participated in several successful joint ventures with AFGE. The first was a joint facilitation of a Labor Management Partnership Council retreat at the Defense Supply Center-Richmond. The main topic before the Council was the contentious issue of contracting out. With the aid of the labor-management co-facilitators, the group was able to identify the underlying issues that were essentially the core of the dispute. The group was then able to work through these sensitive issues and reach viable solutions using interest-based problem solving.

In Vicksburg, Mississippi, a FAS representative teamed up with an AFGE representative to provide partnership training to the Waterways Experiment Station and the Vicksburg District, U.S. Army Corps of Engineers. The labor-management relationships in these two organizations were quite strained prior to the training. By serving as positive role models for labor-management cooperation, the trainers helped inspire the groups to overcome the mistrust which characterized their adversarial relationships. The groups then worked diligently to write partnership agreements and form partnership councils. By doing so, they created strong foundations upon which their respective partnerships could grow, furthering their endeavor to enhance the efficiency and effectiveness of their organizations through joint problem solving.

B. Perspective from the Workplace

The Climate

As part of its advisory role to the President by reporting on the progress of partnerships throughout the Government, the Council has for the last four years conducted a Governmentwide survey of Federal management and union representatives.

Although the Council has surveyed participants in partnership in past years, the Council's strategic plan for 1997 emphasized learning about the labor-management relations climate throughout the Federal service. In its 1997 survey, the Council conducted a broader assessment of the labor-management relations climate in the Federal sector and the perceived effect of partnerships on various measures of organizational performance. The 1997 survey differs from prior surveys in several key respects:

- ◆ The unit of analysis was the bargaining unit union representative and representatives of management, regardless of whether a partnership exists in the unit;
- ◆ A previously validated labor-management climate assessment was included; and
- ◆ Unit performance before and after partnership was compared on a variety of topics, including quality and productivity.

The results of the 1997 survey highlight the extent to which partnership activity is affecting the labor-management relations climate and Government performance.

Partnership continues to grow in the Federal labor-management relations program. Nearly 80 percent of the respondents reported that a partnership council or a partnership agreement had been established for the bargaining unit for which they were responsible.

Survey results show that partnership is making a difference in several areas. In comparing the period before the creation of labor-management partnerships with the period after the formation of partnerships, employees and managers described several positive results. Labor-management representatives noted that the following performance-related measures had increased since the advent of partnership, all pointing to the institutionalization of collaborative labor-management relations:

- ◆ Sharing of information by management;
- ◆ Union input into organizational decisions;
- ◆ Problem solving relationship between union and management;
- ◆ Management understanding of union role, interests and objectives; and
- ◆ Union member understanding of management's organizational interests and problems.

In addition to the positive labor-management relations climate, other organizational progress is also being made. For instance, those responding to the survey indicated that since the pre-partnership period there has been a decline in the rate of employee absenteeism and tardiness, there are fewer grievances and there is less waste in the Federal Government. However, those surveyed feel that the level of job security has also declined.

The Issues Facing Partnerships

The National Partnership Council has been working with labor-management partners from across the Government to begin addressing systemic challenges to partnership and to provide resources to individual groups to overcome those barriers. Labor-management partnerships go through what may be referred to as a "life-cycle." In each stage of the partnership cycle, particular issues or challenges may predominate. As the partnership matures, initial issues and challenges may become less important, and new ones may arise. Although each partnership is unique, the Council has found that each stage of the partnership relationship often gives rise to distinctive issues and challenges.

During the first years of the partnership initiative, the Council focused on the issues most important to forming partnerships. The Council's early work confirmed the two necessary pre-conditions for forming successful partnerships: development of an atmosphere of trust among the partners and acquisition of the skills necessary for cooperative problem solving. Accordingly, the Council devoted its attention to such issues as changing the labor-management climate to develop trust, training in interest-based problem solving, and starting partnership councils and preparing partnership agreements.

Although partnerships had not been started everywhere, by 1996, 72% of bargaining unit employees were under partnership agreements, up from only 53% just two years earlier. Many partnerships that had been formed and become effective were entering new phases in the life-cycle of the partnership relationship and were seeking help in dealing with new issues and problems.

In 1997 partnership celebrated its fourth anniversary. A number of participants in working-level partnerships have expressed their continuing concern about implementation of the President's directives in Executive Order 12871, particularly concerning the establishment of partnership councils at the bargaining unit level and the requirement to negotiate concerning matters encompassed by 7106(b)(1),

Stage II

Excerpt From an Award Winning Partnership

⊙ "The downsizing environment has compounded the usual funding limitations and resistance to change. Further, the flexibility in the workforce has decreased. In process currently is a re-evaluation of the performance system since it does not adequately address the team environment in which we now find ourselves."

conducting business and improving labor-management relations (such as new pre-decisional processes or ground rules for employee involvement). Leaders often have various ideas about what constitutes partnership. In the absence of a common vision, partnerships will have difficulty deciding how they want to work together or what issues they want to tackle. The result may be a "paper" partnership, with all of the organizational accoutrements, but little effectiveness in the workplace.

Stage II: Overcoming Sticking Points

In this stage, the parties have formed a working partnership, established cooperative and trusting relations, and often have successfully overcome an immediate crisis. Confident in their partnership relationship, they tackle a difficult problem and are unable to resolve it in partnership or with interest-based techniques. They may resort to traditional negotiations.

Some partners may feel that the partnership has failed. These partners must define the relationship between partnership and traditional collective bargaining, and find ways to maintain strong partnerships even when some issues must be resolved by traditional means. Once they realize that partnership is a tool, not a panacea, they may have to reset their expectations for what they want their partnership to accomplish, and confront issues about sharing power and allocating resources.

Stage III. Maintaining an Effective Partnership

Even the most successful partnerships are faced with the problem of sustaining high levels of energy and enthusiasm over extended periods. Some of the model partnerships honored by the National Partnership Council have said that their partnerships reach a plateau and need reinvigoration from time to time. They may sense that partnership has lost its newness and resolved the major issues. The lesson across Government is that established and successful partnerships will not always remain so. If partnerships lose the commitment of the partners they may weaken or even die.

The major challenge experienced by mature partnerships tends to be turnover in management and union ranks. These

Getting Results Through Partnership

“We want to be full partners. We want to work. We want Government to work better.

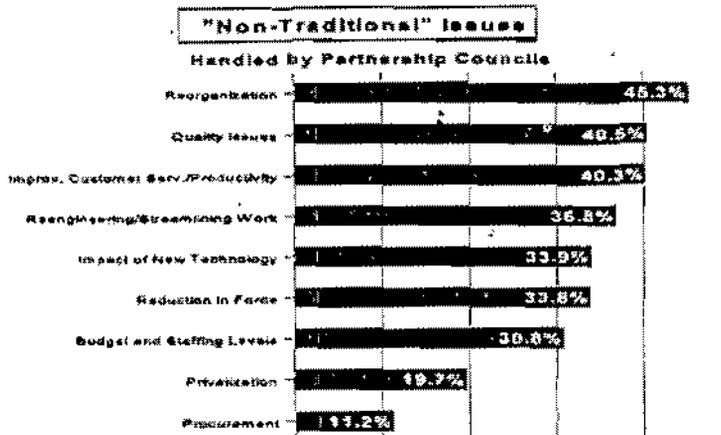
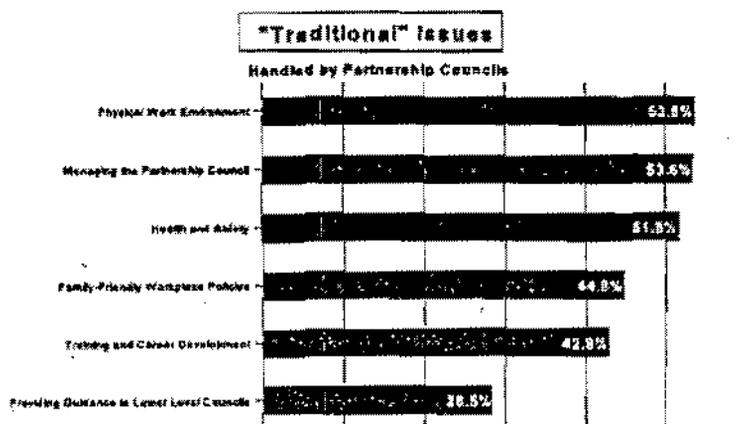
We want to be there in partnership to help identify the problems. We want to be there in partnership to help craft the solution.

We want to be there in partnership to help implement together the solution that this Government needs.

And we're prepared to work in partnership to make some bold leaps to turn this Government around and make it work the way it should work.”

John Sturdivant, President, American Federation of Government Employees (AFL-CIO), 1988-1997
Reinventing Government Summit, Philadelphia, June 25, 1993

Reinventing government remains a challenge. For some, partnership has effectively addressed the difficulties of reinvention and reengineering. Although partnerships continue to discuss traditional labor-management issues such as the physical work environment, health and safety, family-friendly workplace policies, and other conditions of employment, they are also beginning to examine issues related to the performance of the agency, such as reorganizations, staffing patterns, reengineering work, new technology and customer service.



A. Improving the Way Government Does Business

There are labor and management representatives who come to work day after day and week after week looking for opportunities and avenues to improve how Government services are delivered. The results of their efforts, and therefore the results of partnership, come in many different shapes and sizes: strategic plans and initiatives, reengineered service delivery, increased customer satisfaction, cost savings and avoidance, and employee involvement. Collaborative problem solving between labor and management is often the first step to improving the way Government does business.

Characterized by openness, trust, and cooperation, partnership paves the way for organizational improvement. As union and management representatives participate in a partnership environment, they often discuss more issues than they would in an adversarial labor-management relations atmosphere. Innovation and the discussion of new ideas can often lead to more positive results for an organization and its employees.

“If partnership is to become the way we do business over the long term, we will need to convince a broad range of stakeholders that it works for them.

Employees must see how it produces better results than confrontation.

Managers must see how it can produce better decisions within reasonable time frames.

Congress, the media and the American people must see how the investments . . . in partnership produce better agency performance and better government.”

James F. Keenan, Labor Relations
Officer, Department of Education
National Partnership Council
Meeting - June 11, 1997,
Washington, DC

Illustrations for the Practitioner Strategic Planning

- ① Department of the Navy
Naval Weapons Station, Seal Beach, California
American Federation of Government Employees
(AFL-CIO), Local 2161
International Federation of Professional and Technical
Engineers, Unit Number 174

Naval Weapons Station Seal Beach is one of four activities under the Naval Ordnance Center's Pacific Division. In April 1996, union and management officials of the Seal Beach Naval Weapons Station formed a labor-management partnership. Recognizing the need for improved trust and communication, members of the partnership council attended a joint training session in team building and strategic planning. At the same time, the council developed its mission statement:

"We exist to identify policy issues and craft solutions to meet the command mission and enhance the employees' quality of life. We accomplish this through teamwork, trust and open communications while emphasizing customer satisfaction."

Early in the council's history, a strategic plan was developed that included a 90-day moving window of assigned "tactical" improvements called the "Short Term Wins List." Many of the council's achievements have been fostered by this list and its emphasis on accountability for project completion. As the partnership council developed its own strategic plan, it became clear that there was significant overlap between the council's strategic plan and the strategic plan of the command. In early 1997 a decision was made to merge the two plans into one.

Seal Beach's strategic plan consists of tactical actions developed during the council meetings that in turn are incorporated into six station goals. The goals are managed

"No move to reorganize for quality can succeed without the full and equal participation of workers and their unions. Indeed, a unionized workplace can provide a leg up because forums already exist for labor and management exchange."

*From Red Tape to Results:
Creating a Government That Works
Better and Costs Less,
September 7, 1993, p. 87*

Progress toward completion of the FAA Academy's strategic plan is evaluated jointly by the Partnership Council and the Academy Management Team on an annual basis. The evaluation process is conducted to link agency performance planning and reporting activities.

This partnership council recently conducted a survey of the values of bargaining unit employees. The survey enabled the Council to identify areas which form the basis of a strategic issue or warrant some form of intervention. Results from the survey ultimately led to a review and revision of the employee recognition and awards processes.

As the Academy has begun to move toward a fee-for-service operation, management and the union have had to reexamine their roles in the organization. The partnership council was instrumental in developing a Fee-for-Service Business Plan to encompass all aspects of Academy operations.

Reinvention

The objectives of the National Performance Review serve as guideposts to those agencies and installations striving to provide better Government services. Although organizational change is rarely easy, partnership has proven to be an effective avenue for facilitating change. In many instances, partnership meetings between labor and management serve as a forum where those with a breadth of organizational knowledge feel uninhibited in exchanging ideas. Not only do partnerships help pave the way for better Government services, but they provide labor and management with a vehicle that supports open and honest dialogue about important organizational issues.

Improved communications, fostered by partnership, has helped the Veterans Affairs Medical Center in Spokane, Washington and the National Federation of Federal Employees, Local 1641 reengineer health care delivery for its 13,000 patients annually. At the U.S. Customs Service Ports of Philadelphia and Hidalgo/Pharr, labor and management put their heads together to increase the effectiveness of their operations, thereby more fully accomplishing the agency's mission.

30 percent. These redesign efforts have enabled the Medical Center to identify freed-up human capital for redeployment to areas critical to continued improvement, such as staffing for increased primary care.

Another important change was brought forward by the third phase team that was charged with monitoring the results of the implemented changes and providing analysis and feedback. Preliminary findings for the first 300 cases for the third quarter of fiscal year 1996 reveal an average length of stay below the Health Care Financing Administration's average target. Length of stay was reduced from an average in 1995 of 7.2 days to a current average of 5.1 demonstrating high efficiency on the part of the entire organization, especially the inpatient and outpatient care teams.

The teams accomplished all this while simultaneously managing to strengthen patient's positive perception of his or her health care experience. Customer surveys indicate a 14 percent increase in patient satisfaction relative to coordination of care; a 31 percent increase in emotional support, and a 34 percent increase relative to timeliness of services in primary care. Furthermore, 90 percent of the time, patients are seen within twenty minutes in the outpatient setting, surpassing the national standard of patients being seen within 30 minutes of their scheduled appointment.

② Department of the Treasury
U.S. Customs Service, Port of Philadelphia
National Treasury Employees Union, Chapters 110 and
135

The Philadelphia Service Port Partnership Council represents Customs Service employees and managers at the port level of Customs located in Customs ports throughout Pennsylvania, Delaware, and southern New Jersey. The mission of the Customs Service is to ensure compliance with law for all cargoes and persons entering and exiting the United States. The priorities of the Customs Service are the interdiction of illegal narcotics, the interdiction of illegal monetary instruments, the regulation of international trade, and the collection of Customs duties.

A recent survey of the Philadelphia/Wilmington trade community has reported that service has improved greatly while being both professional and timely. The trade community, as a major external customer, has had input into the partnership through continual meetings with Customs at all levels.

- ④ Department of the Treasury
U.S. Customs Service
Hidalgo/Pharr Port of Entry, Pharr, Texas,
National Treasury Employees Union, Chapter 149

The partnership at the U.S. Customs Hidalgo/Pharr Port of Entry encompasses two international border crossing facilities within the cities of Hidalgo and Pharr, Texas. The partnership council routinely tackles issues that span the spectrum from staffing and customer service to safety and health issues. The partnership represents a significant and radical improvement over past practice in which decisions were made unilaterally with little or no input from outside the ranks of management. Mission-related decisions are no longer born of an adversarial relationship. Instead, such decisions are created in an atmosphere where the parties seek to implement only those policies and procedures that represent the best interests of the customer, management, and the employee. Members of the partnership council attribute their successes to the spirit of cooperation that has been forged between the bargaining unit members and management.

The members of the partnership council have, on numerous occasions, negotiated over the items provided for in Section 2(d) of Executive Order 12871. Discussions on where money would best be spent, the grade and numbers of employees to be hired and where additional employees would be utilized have been frequent topics at partnership meetings.

B. Developing Human Resources

To meet the opportunities and challenges of a reinvented government, employees must be able to use their knowledge, skills, and abilities to reach their highest level of competence and job satisfaction. By ensuring that the Federal workplace is responsive to the needs of its employees, Government agencies are better equipped to meet the needs of their customers. In better serving its customers, the Federal Government takes another step in reinvention.

As an integral part of the reinvention effort, a collaborative labor-management relations climate can help agencies achieve improvements in the processes associated with the development of its employees. Partnership affords managers and employees the opportunity to evaluate and revise the performance management processes. Through open discussion, labor and management representatives have devised new performance appraisal methods and employee recognition programs that have increased employee morale and job satisfaction.

Performance management is not the only human resource topic partnerships are addressing. Workplace flexibilities and family-friendly initiatives are also finding their way into labor-management discussions.

Organizations, managers, and employees are seeing first hand the results of collaborative labor-management relations. With partnership as the vehicle, tough issues are coming to the forefront for candid discussion and effective action.

Performance Management

Organizations can work only as well as their employees perform. Partnership can provide employees and managers opportunities to improve communication, which is a key principle of performance management. If there is no communication between a supervisor and employee--if the

“ . . . A new spirit in government, in which creativity and innovation are rewarded, not frowned upon.”

Vice President Al Gore in
Businesslike Government, 1997 p.4

Illustrations for the Practitioner Partnership & Performance Management

**① U.S. Equal Employment Opportunity Office
National Council of Field EEOC Locals No. 216, AFGE
(AFL-CIO)**

Training and employee development are critical to the success of all partnership efforts and reinvention initiatives in any agency. The Equal Employment Opportunity Commission's (EEOC) national partnership council has taken strides in providing agency-wide training and development opportunities for EEOC employees.

The training/career enhancement work group, under the auspices of the national partnership council, developed a career enhancement internship program under which clerical and administrative support staff are given opportunities to acquire training and qualifying experience for higher level positions in occupations where the agency has great need. This program bridges a critical experience/technical knowledge gap in providing support personnel the opportunity to significantly advance their careers.

This program brings together the best aspects of a cooperative and supportive work environment to assure success for all those involved. Each intern is paired with a mentor who is knowledgeable about the technical and personal skills and abilities required for successful performance. An office applies for participation in the program and demonstrates commitment by designating a supervisor and a mentor to work with and support the selected program intern.

The agency has committed significant resources devoted to training not only the interns, but also the entire support network within the interns' offices, including assigned supervisors and mentors. One of the goals of the training for supervisors and mentors is to assure a cooperative and supportive atmosphere which increases the chances that the interns will succeed.

In 1994 the Technical Services Division began the lengthy process of improving the way they provided service to their customers. An active partnership exists between the Technical Services Division and AFGE Local 2186. The goals of the partnership are to resolve conflicts and issues before they become grievances or unfair labor practices, to improve organizational processes, and to enhance the way Technical Services Division delivers service to their customers.

Previously, labor-management relations were extremely antagonistic and generally ended in stalemates instead of productive solutions. The partnership agreement has changed this relationship dramatically. Differences are now resolved in-house through better communication. Since its implementation, the number of grievances are down from two per year to zero. It is estimated that this has saved the Division \$12,000 - \$15,000 already and that it will result in an annual savings of \$20,000. It is also important to note that, since the inception of partnering, surveys indicate increased customer satisfaction, higher employee morale and increased interaction between employees, management, and the Union.

The partnership has improved the operation of the Technical Services Division and contributed to the success of many initiatives to increase customer satisfaction at the Boulder site. Of utmost importance to the partnership council is the development of the employees in the Technical Services Division.

Through partnership, labor and management redesigned the performance appraisal process. A group of employees, with full support of the partnership council, was charged with developing a peer performance appraisal and review system. Previously, appraisals were completed with input from only the employee and the supervisor. The new procedure incorporates input from customers, peers, the employee, and the supervisor. The Technical Services Division expects the new evaluation process to result in more accurate employee reviews and a stronger focus on the mission of the Division.

With the increased usage of teams in the workplace, it is becoming more and more important for organizations to recognize the valuable contributions that teams make. The annual quality awards program attempts to honor contributions made not only by individuals, but by teams as well.

Continuous quality improvement (CQI) teams address system-wide processes and issues. So far, 29 interdisciplinary quality improvement teams have been chartered between the labor-management partners at the hospital. Each of these teams is tasked with analyzing various hospital processes and identifying customer needs.

Four of the CQI teams were recipients of the Director's Award. Results achieved due to team efforts include:

- ◆ Thrombolytic Therapy team decreased critical medication delivery time from 92 to 20 minutes,
- ◆ Processing of Compensation and Pension examinations decreased from average of 31 to 18 days,
- ◆ Turnaround time for x-ray reports decreased from average of 8 days to a single day,
- ◆ Appointment access time for specialty clinics decreased from 10 - 12 weeks to 1 -2 weeks,
- ◆ Waiting time for new Gastrointestinal patients decreased from 8 to 1 week, and
- ◆ Pneumococcal vaccine doses increased from 200 (1990) to over 2400 doses administered in 1995.

“During the three years since the Federal Railroad Administration’s Partnership Program was formalized, we have learned that it takes considerable time and patience to build the trust needed to effectively operate in a partnering environment. The road to a successful partnership is not an easy one, but the rewards are worth the ride.”

Federal Railroad Administration and
the American Federation of
Government Employees, Local 2814,
1997 National Partnership Award
Nomination Form

management system that measures results rather than activity and directly ties in to the agency’s mission. As a result, employees can now relate their individual performance to an overall agency objective.

Key elements of the new system are:

- ◆ rates only critical elements
- ◆ provides means to address individual performance on a team
- ◆ allows for streamlined “additional element” to be used at any time to recognize either individual or team performance and to so reward
- ◆ reduces summary ratings from five levels to three
- ◆ eliminates in many instances the need for higher level review of standards or ratings
- ◆ eliminates narratives for certain ratings

The parties also allowed for experimentation during the life of the agreement. At the local level, the parties will be able to pilot other types of systems: e.g., a pass/fail system or a system which delinks awards from overall summary ratings. The regional offices of the department are still in the first year of these revisions, and the parties will soon be assessing the impact of the changes.

Workplace Flexibilities

Partnerships are getting results in their pursuit of a more family-friendly workplace. As the Federal Government’s workforce continues to diversify, workplace flexibilities such as alternative work schedules and telecommuting are becoming more and more important. Labor-management partnerships provide a forum for employees and supervisors to communicate their needs to one another and translate those interests into sound, effective policies. Employees and managers at the Federal Railroad Administration (FRA) and the U.S. Department of Labor (DOL), have worked together

provided much needed flexibility for FRA inspectors to more effectively perform surveillance and enforcement actions on the railroad industry at any time of the day or night. The flexibility that Maxiflex provides to inspectors also allows them to better balance their work/family lives (e.g., scheduling medical appointments and care for sick family members). Maxiflex has improved the FRA's service to the public by providing a more responsive inspector workforce, increased operational efficiency and productivity, and significantly improved employee morale.

Telecommuting: FRA's field inspectors spend approximately 80% of their time conducting inspections; only 20% is spent in an office setting. Thus, the concept of allowing volunteer participants to work from their homes and thereby reducing Government-leased office space or closing offices seemed a logical idea to pursue. During the developmental process, the labor-management workgroup determined that all positions in the FRA were eligible to telecommute: some on an ad-hoc basis, others working from their homes on a permanent basis. Many of the issues involved in developing this program had no precedent to follow. Issues such as defining duty locations, providing office furniture and resolving safety/health issues in a home-based environment presented a huge challenge for a partnering effort.

Currently the FRA has approximately 25% of its overall populace participating in telecommuting. After final implementation is complete, it is anticipated that as much as 50% of the field workforce will be participating with most working from home-based offices. As a result, nine field offices have been closed and rental space in two others has been reduced at an annual savings of \$91,000. When fully implemented, the opportunity will be available to close at least five additional offices and reduce space in several others. In addition, this program has

Secretary of Labor's approval to implement a full-fledged telecommuting program. With the Secretary's charge, the parties, utilizing the techniques of interest-based bargaining, negotiated a new four-year agreement incorporating a permanent flexiplace program, effective February 1997.

The parties' efforts resulted in a flexible program open to all DOL field employees. While available to all employees, the essence of the program is a joint recognition that flexiplace is a benefit and not an entitlement. Employees may partake in the program if certain predefined criteria or conditions are met. These criteria include factors such as whether the employee's work is portable -- i.e., whether the work can in fact be performed at an alternate work site; other factors: costs of such an arrangement; technological and equipment needs; communication needs; etc. The program also distinguishes between a "formal" and "informal" ("episodic") approach to flexiplace. Informal or episodic flexiplace is temporary in nature, involves little or no costs, and requires few guidelines. Formal flexiplace, which is more permanent in nature, usually entails some costs, results in a written agreement between the employee and supervisor, and provides for temporary recall or permanent termination. Most importantly, the parties emphasized that the program must be voluntary for both the employee and supervisor. In the event that a dispute arises in connection with denial, recall or termination of flexiplace, the parties have incorporated a special dispute resolution process to address disagreements.

To further elaborate on the flexiplace program and to ensure its success at the operating level, the parties wrote a joint bargaining history and jointly developed a Flexiplace Handbook. The bargaining history provides insight to the parties' discussions at the bargaining table. The handbook supplements the agreement and bargaining history and provides guidance concerning the day-to-day operations of the program. The handbook was made available to all field employees and supervisors interested in participating in the program. The handbook is a proactive means for dispelling certain myths about flexiplace (e.g., that flexiplace is a substitute for child care) and provides technical guidance to those most apt to use it at the working level.

C. Managing Change

For the Federal workforce, change is a law of life.

Change in the workplace manifests itself in various ways. For some Federal employees, change means finding new careers after their positions have been abolished. For others, change means acquiring new skills to adapt to rapidly changing organizational goals or new requirements. For still others, change means becoming more flexible, as the organization's operating mode changes its focus from following unexamined standard procedures to cutting costs and satisfying customers.

This environment of change can be unsettling. Many employees' expectations for their Federal careers were based on the implicit employment contract of a stable organization with fixed goals and a secure job. One response to this change is to feel helpless and victimized. In the workplace, these feelings can lead to paralysis or indifference, precisely when enthusiasm, energy, and a spirit of innovation are needed to master change.

Workplace partnerships can be a powerful tool for managing change. Participating as partners in managing change allows employees to help control the changes that so profoundly affect them, rather than feeling victimized by them.

Several partnerships have shown the way to manage change successfully.

But the Committee's work was not over once the employees had been placed. Customer requirements also demanded attention. The workload was constant, expected quality of service remained high, but numbers and skills of employees were not sufficient. Recognizing the need to restructure the skills mix at the Command, the Committee undertook an employee skills survey to address long and short term workforce capabilities. Assignment and training have been adjusted to focus on critical service quality improvements.

The Committee also made valuable use of employee and customer surveys to verify that their activities were on the right track and to ensure that they were focused on the important tasks. Despite the loss of jobs and a heavy work load, recent surveys of employees and customers show improvements in morale at the Command, as well as in several facets of customer service.

- ② Department of the Army
Rock Island Arsenal, Rock Island, Illinois
American Federation of Government Employees
(AFL-CIO), Locals 2119 and 2134
Federal Firefighters Association, Local 5
International Association of Tool Crafters, Local 1
International Brotherhood of Police Officers (AFL-CIO),
Local 513

Employees at the Rock Island Arsenal in Rock Island Illinois also faced unsettling change. The Arsenal is a Government-owned manufacturing facility that operates like a business: its funds are generated through selling its products (such as weapons systems, tool sets, and outfits) and services (such as logistical support and base operations).

This business needed to cut costs and reduce jobs. Special improvement teams and partnership groups tackled both problems.

A management-union special improvement team reorganized and reengineered the work, saving \$4.8 million in fiscal year 1997 and an estimated \$5 million in fiscal year 1998. The partners also turned their attention to cutting transaction and administrative costs. One of their targets was the cost associated with workplace disputes. Working together, the

The IRS and NTEU reacted to these challenges by relying heavily on up-front education and outreach, utilizing the media, and working with professional and business associations. They identified potential compliance problems in advance, supplied needed information to diverse audiences in innovative ways, and measured the effect of their actions on increasing tax revenue while decreasing taxpayer burden to comply with the law. All facets of their strategy were staffed by both management and NTEU, and input and ideas were gathered from the IRS Olympic Planning Group, comprising managers, employees, and NTEU representatives. The partners' hard work paid off both in increased tax revenue and decreased taxpayer burden. One innovative education program on accounting for income from stadium seat rentals will increase revenue by \$13.6 million.

The IRS and NTEU also faced the challenge of continuing effective operations despite the difficult logistical issues they faced by being located in the area of Atlanta where most of the Olympic Games were held. The partners began their logistics planning by gathering employee input. Three issues surfaced from this information-gathering: employees needed more leave options; flexiplace arrangements were necessary due to transportation challenges; and employees needed accurate information and a forum through which they notify the agency about the issues they were facing. Through partnership, the IRS and NTEU were able to find ways to meet the needs of their customers and get essential work done. They used innovative methods such as trafficking calls to other cities, allowing employees to work at other places and at different times, while keeping the lines of communication open for both internal and external customers.

dramatic savings can be the cumulative result of small changes in how the work is done. As Rock Island demonstrated, small improvements in many day-to-day processes can produce large savings. The detailed and intimate knowledge about how to make these day-to-day processes work better most often comes from the people who are closest to the work.

Third, partnerships reaffirm the organization's commitment to core values of fairness, personal dignity, and the value of work. Difficult decisions honestly made and fairly implemented will be accepted, without rancor, controversy, or conflict, as the Groton and Rock Island experiences demonstrated. Downsizing carried out in a humane manner, with attention to new careers and investments in people, strengthen the long-term bonds between the organization and the employees who will do the work of the future.

Evaluation Model Considerations

Organizational Performance

- What types of activities should be measured?
- What information is relevant to that evaluation?
- How and by whom will that information be collected and presented?

Progress and Improvements

- How do you define success?
- What are the benchmarks against which success will be measured?

Results from Labor-Management Partnerships

- What criteria will be used to determine if partnership was a catalyst for the result?

Provided by the FLRA

Although partnership evaluation is required by Executive Order 12871, relatively few formal, agency-level partnership evaluations have been conducted. Many partnerships, however, informally "evaluate" with progress checks and informal self-evaluations. The biggest challenge to measuring results and outcomes of partnership remains the ability to determine to what extent business improvements are due to partnership activities.

There is no single model of partnership evaluation. Labor-management partners must themselves jointly develop an evaluation methodology or process. Any evaluation model a partnership adopts should consider the following issues in the table on the left hand side of this page.

Address Expectations

The General Counsel of the Federal Labor Relations Authority (FLRA) has developed a model for evaluating partnership progress based on the premise that the parties must identify their partnership goals and expectations early. Labor and management must know what partnership is, what it means to them, and what their goals are. The partners can then decide what types of information will be collected and how and from whom that information will be collected in order to evaluate whether their goals have been achieved.

Following the mandate of the Executive Order, the General Counsel's model suggests a step-by-step decisional process and action plan that assists the parties in identifying their definition of success – identify the activities which pertain to organizational performance and how they should be measured, the benchmarks against which progress and improvements are measured, and the criteria to determine if labor-management partnerships were a catalyst for these results.

SSA & Evaluation

The Social Security Administration has become one of the first agencies to comply with section 2(c) of Executive Order 12871 by completing an evaluation of the effects of Partnership on organizational performance. Chartering a joint management-labor (AFGE) workgroup to conduct the review, SSA was able to chart its progress in partnership and related areas, (such as interest-based bargaining) and to set the stage for the future.

Objectives of the evaluation:

1. Compile an inventory of Agency partnership initiatives;
2. Solicit input from various central and field office sources such as Partnership Councils, work teams, managers, union representatives and others who have used partnership principles;
3. Identify progress and improvements in organizational performance;
4. Identify partnership successes for use as future models; and
5. Identify where partnership is not working and make recommendations for improvement.

The evaluation identified over 1,500 outcomes that have been initiated by, or enhanced through, partnership efforts. Many of these initiatives have been tied to improvements in customer service; quality of work life; and decreases in operational costs.

SSA currently has 42 partnership councils at various levels of the organization. While SSA has made considerable progress in the partnership arena, the report also makes a number of recommendations for further improvements.

possibilities, from conducting a brief operational critique at the conclusion of a partnership council meeting to assessing long-term accomplishments on an annual cycle.

Key measurement concepts that experienced partners highlight include the importance of establishing baselines, evaluating across organizational lines, including all levels of partnership activities, keeping the process simple and manageable, using a standardized approach and objective data, using existing data collection systems to the extent possible, creating a versatile and dynamic evaluation methodology (one that is subject to review and change as necessary), and addressing both tangible and intangible outcomes.

annual performance plans to Congress. Next fiscal year, they must be able to show to Congress and the public measurable positive results in their missions. In the future more than ever, agencies and unions must be able to clearly demonstrate the positive results of partnership, especially its contribution to agency performance. In particular, partnership activities must link with work plans and performance measures that agencies are putting in place.

Moreover, use of official time for union representational duties is under scrutiny by some Members of Congress. Effective partnerships will need to focus not only on the amount of official time but, more importantly, on how the time is being used. Creating, building, and sustaining partnerships that deliver results usually requires investments of time to develop problem-solving skills, build trust, and devise solutions. Partnerships must be able to demonstrate that the transformation of their relationships from adversarial and litigious to cooperative and results-oriented is reflected in how partners are spending their time.

The National Partnership Council (NPC) stands ready to assist partners as they measure the results and benefits of partnership. The Council's 1998 strategic plan outlines its plan to provide more hands-on skills building opportunities in the areas of relationship development, strategic planning for partners, and partnership evaluation. The NPC is also working with the President's Management Council to bring top level attention to the importance of collaborative labor-management relations.

But skills-building is only part of the Governmentwide formula that the NPC is developing to strengthen partnership. Although a large majority of represented employees are covered by written partnership agreements and partnership councils, many agencies and bargaining units do not have a working partnership structure in place. In other words, the partnership may exist on paper, but not in the workplace. Even among existing partnerships, barriers remain. Survey respondents continue to cite perceptions of lack of mutual trust, lack of commitment, and unclear objectives as barriers to effective partnerships. Recognizing that partnerships have not been established in some organizations, and that some

Appendix A

Executive Order 12871
Labor-Management Partnerships

Presidential Documents

Title 3—

Executive Order 12871 of October 1, 1993

The President

Labor-Management Partnerships

The involvement of Federal Government employees and their union representatives is essential to achieving the National Performance Review's Government reform objectives. Only by changing the nature of Federal labor-management relations so that managers, employees, and employees' elected union representatives serve as partners will it be possible to design and implement comprehensive changes necessary to reform Government. Labor-management partnerships will champion change in Federal Government agencies to transform them into organizations capable of delivering the highest quality services to the American people.

By the authority vested in me as President by the Constitution and the laws of the United States, including section 301 of title 3, United States Code, and in order to establish a new form of labor-management relations throughout the executive branch to promote the principles and recommendations adopted as a result of the National Performance Review, it is hereby ordered:

Section 1. THE NATIONAL PARTNERSHIP COUNCIL. (a) *Establishment and Membership.* There is established the National Partnership Council ("Council"). The Council shall comprise the following members appointed by the President:

- (1) Director of the Office of Personnel Management ("OPM");
 - (2) Deputy Secretary of Labor;
 - (3) Deputy Director for Management, Office of Management and Budget;
 - (4) Chair, Federal Labor Relations Authority;
 - (5) Federal Mediation and Conciliation Director;
 - (6) President, American Federation of Government Employees, AFL-CIO;
 - (7) President, National Federation of Federal Employees;
 - (8) President, National Treasury Employees Union;
 - (9) Secretary-Treasurer of the Public Employees Department, AFL-CIO;
- and
- (10) A deputy Secretary or other officer with department- or agency-wide authority from two executive departments or agencies (hereafter collectively "agency"), not otherwise represented on the Council.

Members shall have 2-year terms on the Council, which may be extended by the President.

(b) *Responsibilities and Functions.* The Council shall advise the President on matters involving labor-management relations in the executive branch. Its activities shall include:

- (1) supporting the creation of labor-management partnerships and promoting partnership efforts in the executive branch, to the extent permitted by law;

Federal employees) in consensual methods of dispute resolution, such as alternative dispute resolution techniques and interest-based bargaining approaches;

(d) negotiate over the subjects set forth in 5 U.S.C. 7106(b)(1), and instruct subordinate officials to do the same; and

(e) evaluate progress and improvements in organizational performance resulting from the labor-management partnerships.

Sec. 3. NO ADMINISTRATIVE OR JUDICIAL REVIEW. This order is intended only to improve the internal management of the executive branch and is not intended to, and does not, create any right to administrative or judicial review, or any other right, substantive or procedural, enforceable by a party against the United States, its agencies or instrumentalities, its officers or employees, or any other person.

William J. Clinton

THE WHITE HOUSE,
October 1, 1993.

[FR Doc. 93-24751
Filed 10-4-93; 5:00 pm]
Billing code 3195-01-M

Appendix B

Executive Order 12974

Presidential Documents

Title 3—

Executive Order 12974 of September 29, 1995

The President

Continuance of Certain Federal Advisory Committees

By the authority vested in me as President by the Constitution and the laws of the United States of America, and in accordance with the provisions of the Federal Advisory Committee Act, as amended (5 U.S.C. App.), it is hereby ordered as follows:

Section 1. Each advisory committee listed below is continued until September 30, 1997.

(a) Committee for the Preservation of the White House; Executive Order No. 11145, as amended (Department of the Interior).

(b) Federal Advisory Council on Occupational Safety and Health; Executive Order No. 12196, as amended (Department of Labor).

(c) National Partnership Council; Executive Order No. 12871 (Office of Personnel Management).

(d) President's Advisory Commission on Educational Excellence for Hispanic Americans; Executive Order No. 12900 (Department of Education).

(e) President's Board of Advisors on Historically Black Colleges and Universities; Executive Order No. 12876 (Department of Education).

(f) President's Commission on White House Fellowships; Executive Order No. 11183, as amended (Office of Personnel Management).

(g) President's Committee of Advisors on Science and Technology; Executive Order No. 12882, as amended (Office of Science and Technology Policy).

(h) President's Committee on the Arts and the Humanities; Executive Order No. 12367, as amended (National Endowment for the Arts).

(i) President's Committee on the International Labor Organization; Executive Order No. 12216, as amended (Department of Labor).

(j) President's Committee on Mental Retardation; Executive Order No. 11776, as amended (Department of Health and Human Services).

(k) President's Committee on the National Medal of Science; Executive Order No. 11287, as amended (National Science Foundation).

(l) President's Council on Physical Fitness and Sports; Executive Order No. 12345, as amended (Department of Health and Human Services).

(m) President's Export Council; Executive Order No. 12131, as amended (Department of Commerce).

(n) President's National Security Telecommunications Advisory Committee; Executive Order No. 12382, as amended (Department of Defense).

(o) Trade and Environment Policy Advisory Committee; Executive Order No. 12905 (Office of the United States Trade Representative).

Sec. 2. Notwithstanding the provisions of any other Executive order, the functions of the President under the Federal Advisory Committee Act that are applicable to the committees listed in section 1 of this order, except that of reporting annually to the Congress, shall be performed by the head of the department or agency designated after each committee, in accordance with the guidelines and procedures established by the Administrator of General Services.

Appendix C

Executive Order 12983

Federal Register

Vol. 60, No. 248

Wednesday, December 27, 1995

Presidential Documents

Title 3—

Executive Order 12983 of December 21, 1995

The President

Amendment to Executive Order No. 12871

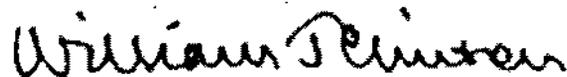
By the authority vested in me as President by the Constitution and the laws of the United States of America, and in order to improve the functioning of the National Partnership Council, it is hereby ordered that Executive Order No. 12871, entitled "Labor-Management Partnerships," ("the order") is amended as follows:

Section 1. Section 1(a) of the order is amended to delete "and" at the end of item (9), delete the period at the end of item (10), add "; and" at the end of item (10), and add item "(11) one elected office holder each from both the Senior Executives Association and the Federal Managers Association."

Sec. 2. Section 1(b) of the order is amended to delete "and" at the end of item (4), delete the period at the end of item (5), add "; and" at the end of item (5), and add "(6) reporting to the President by October 1996 on the progress of and results achieved through labor-management partnership throughout the executive branch."

Sec. 3. Section 1(c)(2) of the order is revised to read: "(2) The Council shall seek input from nonmember Federal agencies, particularly smaller agencies. It also may, from time to time, invite experts from the private and public sectors to submit information. The Council shall also seek input from Federal manager and professional associations, companies, nonprofit organizations, State and local governments, Federal employees, and customers of Federal services, as needed."

Sec. 4. Section 1(c)(4) of the order is revised to read: "(4) Members of the Council shall serve without compensation for their work on the Council, but may be allowed travel expenses, including per diem in lieu of subsistence, as authorized by law, for persons serving intermittently in Government service."



THE WHITE HOUSE,
December 21, 1995.

[FR Doc. 95-31437

Filed 12-22-95; 2:41 pm]

Billing code 3195-01-P

Appendix D

Executive Order 13062

Federal Register
Vol. 62, No. 191
Thursday, October 2, 1997

Presidential Documents

Title 3—

Executive Order 13062 of September 29, 1997

The President

Continuance of Certain Federal Advisory Committees and Amendments to Executive Orders 13038 and 13054

By the authority vested in me as President by the Constitution and the laws of the United States of America, and in accordance with the provisions of the Federal Advisory Committee Act, as amended (5 U.S.C. App.), it is hereby ordered as follows:

Section 1. Each advisory committee listed below is continued until September 30, 1999.

(a) Committee for the Preservation of the White House; Executive Order 11145, as amended (Department of the Interior).

(b) Federal Advisory Council on Occupational Safety and Health; Executive Order 12196, as amended (Department of Labor).

(c) National Partnership Council; Executive Order 12871, as amended (Office of Personnel Management).

(d) President's Advisory Commission on Education Excellence for Hispanic Americans; Executive Order 12900 (Department of Education).

(e) President's Board of Advisors on Historically Black Colleges and Universities; Executive Order 12876 (Department of Education).

(f) President's Commission on White House Fellowships; Executive Order 11183, as amended (Office of Personnel Management).

(g) President's Committee of Advisors on Science and Technology; Executive Order 12882 (Office of Science and Technology Policy).

(h) President's Committee on the Arts and the Humanities; Executive Order 12367, as amended (National Endowment for the Arts).

(i) President's Committee on the International Labor Organization; Executive Order 12216 (Department of Labor).

(j) President's Committee on the National Medal of Science; Executive Order 11287, as amended (National Science Foundation).

(k) President's Committee on Mental Retardation; Executive Order 12994 (Department of Health and Human Services).

(l) President's Council on Physical Fitness and Sports; Executive Order 12345, as amended (Department of Health and Human Services).

(m) President's Export Council; Executive Order 12131, as amended (Department of Commerce).

(n) President's National Security Telecommunications Advisory Committee; Executive Order 12382, as amended (Department of Defense).

(o) Trade and Environment Policy Advisory Committee; Executive Order 12905 (Office of the United States Trade Representative).

Sec. 2. Notwithstanding the provisions of any other Executive order, the functions of the President under the Federal Advisory Committee Act that are applicable to the committees listed in section 1 of this order, except that of reporting annually to the Congress, shall be performed by the head of the department or agency designated after each committee, in accordance with the guidelines and procedures established by the Administrator of General Services.

Appendix E

**1997 Federal Sector Labor-Management
Relations Climate Survey**

**Brief Technical Report
on the
National Partnership Council's 1997
Federal Sector Labor
Relations Climate Survey**

by

**Professor Marick F. Masters
Joseph M. Katz Graduate School of Business
University of Pittsburgh
Pittsburgh, PA 15260
(412) 648-1597
FAX (412) 648-1693
e-mail: Marick@Katz.business.pitt.edu**

**Professor Robert R. Albright
U.S. Coast Guard Academy
15 Mohegan Avenue
New London, CT 06320
(860) 444-8342
FAX (860) 444-8288
e-mail: Albright+@dcseq.uscga.edu**

December 10, 1997

BACKGROUND

Growing public criticism of government waste and an unresponsive federal bureaucracy, combined with a ballooning national debt, led to Vice President Al Gore's National Performance Review, which issued a widely publicized report entitled From Red Tape to Results: Creating a Government That Works Better and Costs Less on September 7, 1993. Recognizing that labor-management cooperation is essential to improving the efficiency and effectiveness of government service to the public (i.e., the customer), the NPR recommended creating a National Partnership Council to promote such cooperation throughout the federal service. The NPR realized that the then existing federal labor relations climate was a barrier to empowering employees to promote public service. Citing a 1991 GAO survey, it "characterized the existing bargaining processes as too adversarial, bogged down by litigation over minute details, plagued by slow and lengthy dispute resolution, and weakened by poor management."

President Clinton created the National Partnership Council by E.O. 12871, issued on October 1, 1993. The order directed the NPC to "advise the President on...supporting the creation of labor-management partnerships and promoting partnership efforts in the executive branch."

Since its inception, the NPC has worked to introduce new partnerships and build on existing ones. As part of its advisory responsibility to the President, it has conducted four annual surveys (1994-1997) of federal management and union representatives, which have provided the basis for NPC reports to the President.

The 1996 NPC Survey of Participants in Labor-Management Partnerships documented the extensive growth in partnership activity. The number of bargaining unit employees in organizations covered by partnership councils had grown from 55 percent in 1994, a year after the

regardless of the existence of councils or the known favorableness/unfavorableness of the labor relations climate.

In the summer of 1997, 1497 surveys were mailed to union and agency (i.e., management) representatives. Altogether, a total of 668 usable surveys were returned by federal labor relations representatives from a broad cross-section of the federal government, yielding a response rate of approximately 44.6 percent. Given that no follow-up mailing was attempted due to resource constraints, this rate of return is deemed to be quite satisfactory.

SAMPLE CHARACTERISTICS

The 668-person sample includes federal labor relations representatives from a diverse set of government agencies and various levels (i.e., national, regional, and local) of bargaining unit activity. Union and management were almost evenly represented in the sample, with 51.5 percent of the respondents being union representatives and 48.5 percent of the respondents representing management.

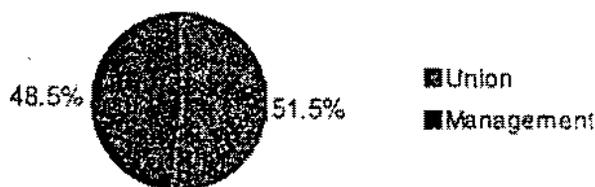


FIGURE 1: Respondents

The majority of the respondents represented either management or the employees at the local level (72.5 percent of the sample) while a smaller portion of the respondents reported they represented their party at either the regional (11.3 percent) or the national level (12.7 percent). A small percentage of the respondents reported they represented their party at multiple levels (3.6 percent).

reported satisfaction more often than union representatives. See comparative graphics below:

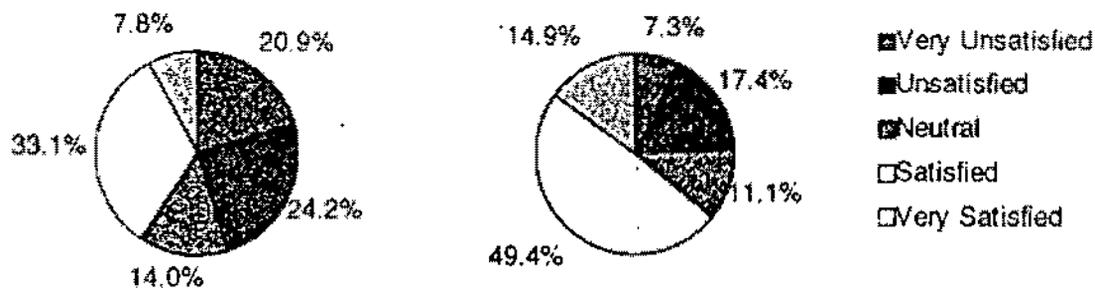


FIGURE 4A: Union Respondents FIGURE 4B: Management Respondents

PARTNERSHIP COUNCILS AND AGREEMENTS:

77.7 percent of the respondents reported that a partnership council or a partnership agreement had been established for the bargaining unit for which they were responsible. Of the councils that had been established, the average length of their existence was slightly over three years. For those workplaces where a partnership agreement was in place, the average time it had been in existence was 2.56 years.

ISSUES HANDLED BY THE PARTNERSHIP COUNCIL OR COMMITTEE

Respondents were asked to indicate the types of issues their council or committee handled. Issues that had traditionally been handled by joint labor-management committees (such as health and safety) were reported as well as non-traditional issues (such as budget and staffing levels). Different issues handled by the partnership councils are shown in the two graphs shown below. The "Y axis" indicates the percentage of respondents (with partnership councils) reporting that their committee handled the particular issue.

follow-up question asked the participants to indicate whether or not the labor-management relationship had improved since the Executive Order. Results, as shown below, appear to indicate that the majority of the respondents have seen improvement in the nature of the labor-management relationship since the issuance of the Executive Order.

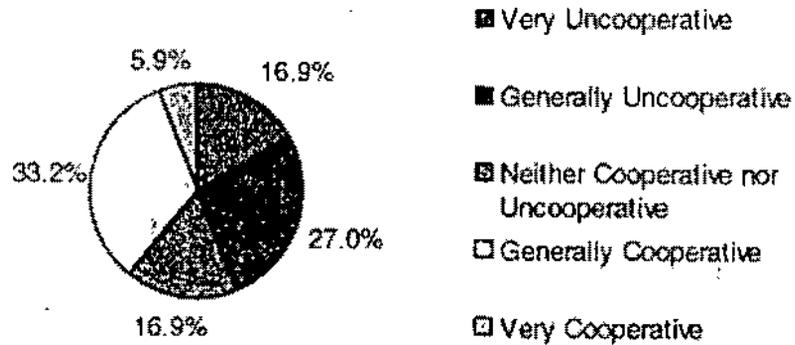


Figure 7: How cooperative was the relationship between management and the union prior to Executive Order 12871?

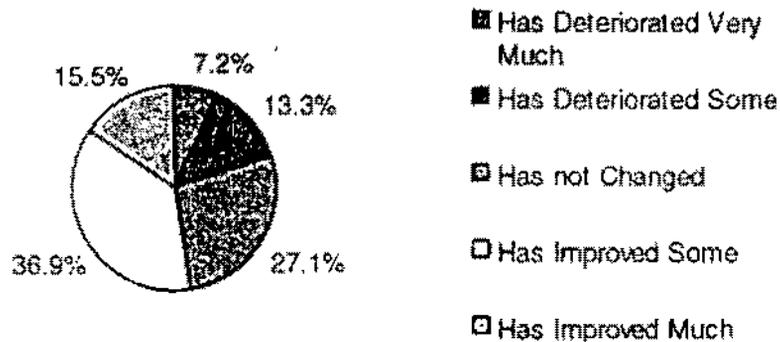


FIGURE 8: To what extent has the labor-management relationship improved since Executive Order 12871 was issued?

LABOR-MANAGEMENT COOPERATION AND THE SCOPE OF PARTNERSHIP COUNCIL ACTIVITY

We also broke down responses on cooperativeness between union and management representatives. The data show that a sizable majority (60.2 percent) of union representatives described the relationship as previously uncooperative, while only 26 percent of management concurred. In contrast, 56.4 percent of the management side found their prior labor-management relations to be cooperative.

relationships and whether or not their councils handled the 15 items previously enumerated, with the exception of whether the council provided guidance to lower level councils. Interestingly, councils were more likely to provide such guidance in situations where representatives perceived their labor relations as uncooperative (again, pre-1993).

Similarly, representatives' responses on whether the labor-management relationship has improved (or deteriorated) were compared to the issues raised in the partnership councils. Several significant differences were found. Specifically, representatives who felt that their labor-management relationships had improved were more likely to have partnerships that handled issues relating to physical work environment, health and safety, training and career development, reduction-in-force, reorganization, customer service/productivity, managing the partnership process, and providing guidance to lower level councils.

RELATIONSHIP BETWEEN TRAINING AND THE ISSUES THAT THE PARTNERSHIP COUNCIL HANDLES

Representatives were asked to indicate whether or not they had received training on various process/substantive topics and the perceived usefulness of such training. Ten specific topics were mentioned, including general orientation/training about workplace partnership, interest-based bargaining, employee involvement, customer service, and quality issues. These responses were compared to the types of issues that partnership councils handled. The following significant differences were found with respect to general orientation/training and issues handled:

(1) Representatives who reported receiving general orientation/training about workplace partnership were more likely to report their partnership council handling the following issues: family-friendly workplace policies, budget and staffing, reorganization, reengineering, quality, improving customer service/productivity, managing the partnership process, and providing guidance to lower committees.

**TABLE 1
TRAINING AREA**

General	Interest Bargaining	ADR	Customer Service	Labor Rights	Budget	Quality	Group Facilitation	Team Building
• Family friendly workplace	• Reorganization	• New Technology	• Procurement	• Procurement	• New Technology	• Family Friendly Workplace	• Health and Safety	• Training/Career Development
• Budget and Staffing	• Reengineering	• Budget and Staffing	• RIF	• Reorganization	• Budget and Staff	• Training and Career Development	• Training/Career Development	• New Technology
• Reorganization	• Privatization	• Reorganization	• Reorganization	• Reengineering	• Procurement	• New Technology	• Family Friendly Workplace	• Budget and Safety
• Reengineering	• Quality	• Reengineering	• Reengineering	• Privatization	• RIF	• Budget and Staff	• Physical Work Environment	• Procurement
• Quality	• Customer Service	• Privatization	• Privatization		• Reengineering	• Procurement	• New Technology	• Reengineering
• Customer Service	• Partnership Process	• Quality	• Quality		• Privatization	• Reengineering	• Budget and Staffing	• RIF
• Partnership Process	• Lower-Level Guidance	• Customer Service	• Customer Service		• Quality	• Privatization	• Procurement	• Reorganization
• Lower-Level Guidance			• Partnership Process		• Customer Service	• Quality	• RIF	• Privatization
					• Partnership	• Customer Service	• Reorganization	• Quality
					• Lower-Level Guidance	• Partnership Process	• Reengineering	• Customer Service
						• Lower-Level Guidance	• Privatization	• Partnership Process
							• Quality	• Lower-level Guidance
							• Customer Service	
							• Partnership Process	
							• Lower-level Guidance	

Item	Average Score 5 = Strongly Agree
A sense of fairness is associated with union-management dealings in this place.	3.30
Employees have a positive view on joint union-management committees here.	3.30
There is a great deal of concern for the other party's point of view in the union-management relationship.	3.60
Employees generally view the conditions of their employment here as fair.	3.64

Those climate items for which there is the strongest expressed disagreement include:

Item	Average Score 1 = Strongly Disagree
The parties regularly quarrel over minor issues.	2.04
Union and management in this organization tend to dislike each other.	2.29
Management often opposes the changes advocated by unions here.	2.69

ESTABLISHING COOPERATIVE LABOR RELATIONS

The respondents were asked the extent to which the parties support the establishment of more positive labor relations. They were asked to choose one of the following three responses: generally opposed (1); neutral (2); generally in favor (3). Union members and officials, as a group, were perceived by the sample to be somewhat more in favor of positive labor relations than management was perceived to be. Union officials' mean score was 2.70 while managements' mean score was 2.40. On this particular measure, both sides (union and management) seemed to

on issues such as wages, benefits and grievances.

PERFORMANCE-RELATED MEASURES AND PARTNERSHIP EXPERIENCE

Respondents were asked to compare the period after their unit formed a labor-management partnership to the period before they formed a labor-management partnership and then indicate whether a number of performance variables had changed since the pre-partnership period. A total of 20 variables were assessed using a five point scale that ranged from much lower (1) to much higher (5).

The top five variables that respondents indicated had moved to the higher end of the scale were:

Variable	Mean Score
Union input into organizational decisions	3.61
Sharing of information by management	3.60
Problem solving relationship between union and management	3.60
Management understanding of union role, interests and objectives	3.58
Union member understanding of management's organizational interests and problems	3.48

The bottom five variables that respondents indicated had moved toward the lower end of the scale were:

Variables	Mean Score
Level of job security	2.46
Adversarial relationship between management and union leadership	2.48
Rate of grievances	2.49
Waste	2.69
Adversarial relationship between supervisors and union members	2.70

Correlations were also run between the harmony and hostility climate measures and the performance measures. Selected results are reported in Table 2 below. Positive correlations between harmony and the performance measures signify that higher levels of labor-management harmony are associated with higher or improved performance. Conversely, a negative correlation between hostility and performance means that as hostility increases, performance has suffered, i.e.,

Appendix F

1997 National Partnership Award Honorees

1997 National Partnership Award Honorees

For the 1997 National Partnership Award (Alphabetical Order):

1. Department of the Army, Rock Island Arsenal, Rock Island, Illinois, the International Brotherhood of Police Officers (AFL-CIO), Local 513; International Association of Tool Crafters, Local 1; Federal Firefighters Association, Local 5; and the American Federation of Government Employees (AFL-CIO), Locals 2119 and 2134
2. Department of the Navy, Supervisor of Shipbuilding, Conversion, and Repair, Groton, Connecticut, and the American Federation of Government Employees (AFL-CIO), Local 2105
3. Department of the Treasury, Internal Revenue Service, Georgia District, Atlanta, Georgia, and the National Treasury Employees Union, Chapter 26.
4. Department of the Treasury, U.S. Customs Service, Port of Philadelphia, Philadelphia, Pennsylvania, and the National Treasury Employees Union, Chapters 110 and 135.
5. Department of Veterans Affairs, James A. Haley Veterans' Hospital, Tampa, Florida, the American Federation of Government Employees (AFL-CIO), Local 547, and the Florida Nurses Association (FNA), Tampa Professional Nurses Unit

For the 1997 National Partnership Award Honorable Mention Citation (Alphabetical Order):

1. Department of the Treasury, U.S. Customs Service, Hidalgo/Pharr Port of Entry, Pharr, Texas, and the National Treasury Employees Union, Chapter 149.
2. Department of Veterans Affairs, Medical Center, Spokane, Washington, and the National Federation of Federal Employees, Local 1641.

THE WHITE HOUSE

WASHINGTON

October 28, 1999

MEMORANDUM FOR THE HEADS OF EXECUTIVE DEPARTMENTS AND AGENCIES

SUBJECT: Reaffirmation of Executive Order 12871 --
Labor-Management Partnerships

When I became President, I believed that cooperation between Federal agencies and their unions could help create a Government that works better, costs less, and makes a positive difference in the lives of the American people. That is why I issued Executive Order 12871, Labor-Management Partnerships, and directed agencies to form partnerships with their unions; involve employees and union representatives as full partners in identifying and resolving workplace issues; provide training in consensual methods of dispute resolution; negotiate with unions over the subjects set forth in 5 U.S.C. 7106(b)(1); and evaluate bottom-line results achieved through partnership.

With your hard work and support, we have made great strides over the past 6 years. In many agencies, unions and management are working side by side on the tough challenges facing the Government and its employees. I am very proud of this success, but I am also convinced that we can do even more. I believe the time has come to redouble the Administration's efforts to create genuine labor-management partnerships. Therefore, I am taking new steps to reaffirm my strong commitment to partnership and to renew my call for agencies to work with their unions to achieve the important objectives of the Executive order.

First, I direct agencies to develop a plan with their unions at appropriate levels of recognition for implementing this memorandum and the Executive order. Every effort should be made to develop a plan that helps the agency and its employees deliver the highest quality service to the American people. Whenever possible, workplace issues should be resolved through consensus using interest-based problem-solving techniques. Agencies should aggressively seek training, facilitation, and mediation assistance that can help foster an environment where partnerships can succeed and thrive.

Second, agencies are directed to report to me, through the Office of Management and Budget (OMB), on the progress being made toward achieving the goals of this memorandum and the directives set forth in the Executive order. Reports must be submitted by April 14, 2000, and annually thereafter, and must be prepared with the involvement and input of the unions. Agencies shall describe the nature and extent of their efforts to comply with the Executive order and shall identify specific improvements in customer service, quality, productivity, efficiency, and quality of worklife that have been achieved as a result of partnership. These reports will not only help me assess our progress toward establishing successful partnerships, but will provide best practices that can assist unions and agencies in their efforts to develop effective partnership-building strategies.

Finally, I am directing the Office of Personnel Management to analyze the information contained in these reports and, in coordination with OMB, to advise me on further steps that might be needed to ensure successful implementation of this memorandum and Executive Order 12871.

This memorandum is intended only to improve the internal management of the executive branch and is not intended to and does not create any right to administrative or judicial review, or any other right, substantive or procedural, enforceable by a party against the United States, its agencies or instrumentalities, its officers or employees, or any other person.

William F. Clinton

OFFICE OF MERIT SYSTEMS OVERSIGHT AND EFFECTIVENESS

Introduction

As OPM downsized, we strengthened our focus on our primary mission, which is to protect and enhance the merit system of government. One of the questions that we faced during reinvention was how to protect the merit system even as we deregulated and delegated many HR authorities. The issue was – and remains - how to strike a balance between flexibility on the one hand and unchanging core principles on the other.

The Office of Merit Systems Oversight and Effectiveness (OMSOE) was created in 1995 to help achieve that balance. The Office is headed by an Associate Director, who reports to the Director of OPM.

We now rely on the merit system principles (5 USC 2301) as the foundation for effective human resources management. Those basic principles guide our interpretation of the regulations we enforce. We still insist on enough consistency to ensure that agencies act in accordance with merit principles, but we allow enough flexibility to ensure that agencies focus on results, not process.

Office of Merit Systems Oversight

The Office of Merit Systems Oversight has a staff of about 120 evaluators who conduct on-site evaluations of 7 or 8 major federal agencies each year to ensure that they are following the law with regard to hiring, pay, promotion and related personnel decisions. Our goal is to evaluate the merit system integrity of the 30 major departments and agencies on a four-year cycle, and all the small agencies on a five-year cycle. We also audit delegated examining units and investigate allegations of specific merit system abuses. When problems are found, we are prepared to use our legal authority to obtain prompt corrective action. For example, in one case that drew a great deal of public attention, we stopped the improper use of retention allowances at an agency and froze its authority to make such payments until proper procedures were in place (report on Export-Import Bank attached). In another well-publicized case, we stopped the use of false duty stations and other blatant abuses of the merit system (report on NCUA attached). In short, we work cooperatively with agencies when we can and use our legal authority when we must.

To this end, we broadened the focus of our agency evaluations. Rather than concentrating on case work (e.g., the classification of individual positions at specific installations), we began evaluating human resources management from an agencywide and even governmentwide perspective. We involved agencies in our evaluation planning so we could address their concerns in our reviews. As our collaboration with agencies produced more useful reports, agencies began to view our visits as valuable support rather than mere intrusion.

Because of our on-site presence in agencies, we began to be viewed as the eyes and ears of OPM, able to collect information that could be used to inform HR policy makers. We began conducting special studies dealing with governmentwide HR issues such as

balancing work and family responsibilities, using recruitment incentives, and ensuring fair and open competition. We now make our reports on such systemic issues available through our web site so that all agencies can benefit from our findings. (The following special studies are included in the Appendix: *Achieving a Balance: Meeting Work and Family Obligations*; *The Three Rs: Lessons Learned from Recruitment, Retention, and Relocation Incentives*; *Opportunity Lost: Openness in the Employment Process*; *Poor Performers in Government: A Quest for the True Story*; *Downsizing in the Federal Government*; *Strategic Human Resources Management: Aligning with the Mission*; *HRM Policies and Practices in Title 5-Exempt Organizations*; *Deregulation and Delegation of Human Resources Management Authority in the Federal Government*.)

The reinvention of our oversight program took another step in 2000 when we signed the first two agreements with agencies under which they take primary responsibility for the oversight and effectiveness of their HR programs. Once we sign a memorandum of understanding with an agency, we limit our compliance activity to monitoring the agency's internal oversight program, unless there is a specific allegation or indication of wrongdoing. This places accountability where it belongs and allows us to concentrate on systemic issues and on agencies not yet ready to assume responsibility for their internal oversight.

Office of Merit Systems Effectiveness

As part of the reinvention effort, the program offices within OPM were eliminating regulations that had prescribed processes for HR professionals and had inhibited managers. This effort to "let managers manage" was coming at a time when the working relationship between HR professionals and line managers was changing dramatically. OPM was delegating HR authorities to agencies and encouraging redelegation to line managers, many of whom were unprepared to take on these new responsibilities. At the same time, HR professionals were becoming less able to provide the guidance managers needed. The occupation was downsized considerably during this period, with a significant loss of seasoned HR professionals, making it difficult for HR staffs to meet the challenge of supporting the newly empowered managers.

Without a Federal HR workforce that understands the changes in HR and has the competency to do business the new way, there can ultimately be no reinvention of Federal HRM. Recognizing this, OPM commissioned in 1999 *An Occupation in Transition: A Comprehensive Study of the Federal Human Resources Community* (attached). The report confirmed what we had feared – that not only was the current Federal HR workforce ill-equipped to handle the emerging strategic and mission focus of HRM, it was also less able to deal effectively with the technical HR issues that had been its province for many years.

Both OPM and the Federal HR community at large have taken up the challenge of these findings. OPM has embraced responsibility for the competence of the Federal HR workforce in its 2000 agency strategic plan. Under OMSOE leadership, it is also spearheading an interagency effort to heighten awareness of the problem and create tools to enable agencies to improve the quality of their HR workforce.

Recognizing the increasing importance of the manager's role in a reinvented government, we renewed and heightened our emphasis on the nine merit system principles. These principles and the corresponding twelve prohibited personnel practices (5 USC 2302) provide a program foundation broad enough to encompass both compliance with Federal personnel law and the promotion of effective human resources management.

Consequently, much effort was focused from 1995 forward on making the principles better known, especially to the line managers who are responsible for the government's front-line human resources management. To this end we developed a number of products to heighten merit principles awareness – brochures, posters, wallet cards, mouse pads and a video, as well as a stand-alone training module. Acceptance of these products has been strong, and we have seen a rise in merit principles awareness in our governmentwide surveys.

We also undertook to emphasize agency self-assessment – what we call HRM accountability – as the necessary complement to increased OPM oversight activity. Ultimately, the most effective means for assuring legally compliant, results-oriented HRM at the agency level is to ensure that those agencies have an active program of internal self-assessment and accountability.

We worked with agencies in a number of ways to encourage their internal accountability efforts. One way was to make evaluation of agency accountability systems a regular part of our agency on-site reviews. Another was to develop – with agency inputs – guidance for agencies to use in developing or enhancing HRM accountability systems. The landmark document in this effort was the *HRM Accountability System Development Guide*, (attached) published in 1999. This document laid out for the first time in one place step-by-step guidance for developing and maintaining internal HRM accountability systems. In keeping with the emphasis of reinvented HRM on the critical role of the line manager, it also advocated shared responsibility for HRM between HR staffs and managers, and showed how such sharing could be worked out in practice.

Although it took OPM's accountability guidance to a new level, the *System Development Guide* did not really break new ground in its definition of HRM accountability. From the very beginning of the current HRM accountability program in 1995, we resisted the effort to define accountability as just legal compliance. Taking our cue from the National Performance Review, we insisted that there had to be an "accountability for results" component as well. What the *Guide* did do was to show more clearly than before what was meant by accountability for results. Specifically, it identified four levels of HRM accountability:

- 1) Legal compliance
- 2) Efficient HR processes
- 3) Effective HRM programs
- 4) Alignment with strategic goals of the organization

These levels were arranged in the form of a pyramid, with legal compliance at the bottom, to show graphically that, although strategic alignment is the pinnacle or ultimate goal of agency HRM, it can only exist on top of a foundation of legally compliant, efficient and effective HRM processes and programs.

Once this "hierarchy of accountability" was established, it was a short step to realizing at the agency level that a slightly modified version would serve as a powerful metaphor for OPM's new strategic emphasis on supporting alignment of HRM with the organization's mission. In June 2000, a few days after President Clinton directed Federal agencies by Presidential Memorandum (attached) to align HRM with their missions, OPM Director Lachance introduced OPM's human resources alignment pyramid, based directly on the accountability model described above (speech attached). This new direction was also documented in OPM's Strategic Plan (September 2000 revision), where a strategic objective was added to "align...human resources management (HRM) with agency mission..."

Reinvention of Federal HRM also took another, somewhat distinct path in OMSOE during the Clinton years. The personnel demonstration project authority (5 USC 4703), in existence since the Civil Service Reform Act of 1978, entered into a period of unprecedented activity. Demonstration projects permit the testing of important innovations in Federal HRM by allowing waivers of most provisions of title 5. During the 1990s, ongoing projects such as those at Navy (China Lake), the National Institute of Standards and Technology (NIST), and the Department of Agriculture were identified as successful and made permanent in their agencies. With the addition of the Department of Defense Laboratory and Acquisitions Workforce demonstration projects in the mid-'90s, the total numbers of Federal employees participating in "permanent" and experimental demonstration projects rose to approximately 43,000.

The rigorous evaluations required for each of these demonstration projects led to findings that greatly enhanced our knowledge of the effectiveness and ultimate value of the innovations tested. They also provided a valuable source of information and analysis that could be used to address the concerns of employees or groups of employees who believe they may have been treated unfairly by the experimental systems tested under these projects.

In 1999, OMSOE's demonstration project unit was refashioned into the Center for Human Resource Innovation. In the process it reoriented its mission to encompass the collection and dissemination of information about HR innovations of all types, including those permitted currently under title 5 and therefore not requiring a demonstration project to implement.

In direct support of the reinvention of Federal HRM, demonstration projects served throughout the 8 years of the Clinton Administration as laboratories for change, testing innovations that could improve HRM across Government. More recently, OMSOE's CHRI has supported the same mission by disseminating to Federal agencies vital information about HR innovations of all sorts. As the Clinton years came to a close,

OMSOE continued to advocate for proposals that would improve the demonstration authority by streamlining the project approval process and making it easier to make successful projects permanent in their host agencies.

Office of Workforce Information

The Office of Workforce Information (OWI) joined OMSOE October 1, 1997, as part of the final phase of OPM's reorganization. OWI manages the Central Personnel Data File (CPDF) and serves as the primary national source for Federal civilian employee statistics. The file dates from 1972 and currently covers 1.8 million employees, primarily in the Executive Branch of government. Program offices within OPM, central management agencies, the White House, the media, many academic researchers, and members of the public routinely rely on CPDF data.

The Clinton Administration's desire to make government's information more easily available to the public coincided with the dramatic growth of the Internet and the world wide web. We built a web-based CPDF query and analysis tool called FedScope that allows users self-serve access to non-sensitive Federal employment information. FedScope went "live" in October 2000, adding an extra dimension to OWI's many other statistical offerings available through www.opm.gov.