

**National Council on Federal Labor-Management Relations
21st Public Meeting
July 18, 2012**

The National Council on Federal Labor-Management Relations (NCFLMR) held its 21st meeting on July 18, 2012, at the Office of Personnel Management (OPM). Mr. John Berry (Director, Office of Personnel Management) chaired the meeting. Acting Co-Chair Mr. Daniel Werfel (Controller, Office of Management and Budget (OMB)) was unable to attend, but Dr. Shelley Metzenbaum (Associate Director for Performance and Personnel Management, Office of Management and Budget) sat in for him.

The following Council members also attended:

Name	Title
Mr. William Dougan	President, National Federation of Federal Employees
Mr. Michael Filler	Director of Public Services, International Brotherhood of Teamsters
Mr. John Gage	National President, American Federation of Government Employees
Mr. W. Scott Gould	Deputy Secretary, Department of Veterans Affairs
Mr. David Holway	National President, National Association of Government Employees
Ms. Colleen M. Kelley	National President, National Treasury Employees Union
Mr. H.T. Nguyen	Executive Director, Federal Education Association
Ms. Patricia Niehaus	National President, Federal Managers Association
Ms. Carol Waller Pope	Chair, Federal Labor Relations Authority

Mr. William Bransford, General Council, Senior Executives Association (SEA), sat in for Ms. Carol Bonosaro, President, SEA.

Ms. Catherine Emerson, Department of Homeland Security (DHS) Chief Human Capital Officer, sat in for Ms. Jane Holl Lute, Deputy Secretary, DHS.

Mr. Oscar Gonzales Jr., Deputy Assistant Secretary for Administration, sat in for Ms. Kathleen Merrigan, Deputy Secretary, U.S. Department of Agriculture.

Ms. Charlotte Hayes, Deputy Assistant Secretary for Policy, Department of Labor, sat in for Mr. Seth David Harris, Deputy Secretary of Labor.

Mr. Jack Moteff, Vice President, International Federation of Professional and Technical Engineers (IFPTE) Local 75 sat in for Mr. Gregory Junemann, President, IFPTE.

For most of the meeting, Ms. Terry Rosen, Labor Relations Specialist, American Federation of Government Employees (AFGE), represented Mr. John Gage, National President, AFGE. (Mr. Gage briefly attended the meeting to receive the award mentioned below from Mr. Berry.)

Mr. Pat Tamburrino, Deputy Assistant Secretary of Defense for Civilian Personnel Policy, sat in for Mr. Ashton B. Carter, Deputy Secretary of Defense.

The Designated Federal Officer, Tim Curry, OPM, Deputy Associate Director, Partnership and Labor Relations was present. About 60 members of the public also attended, including 5 media representatives.

Agenda Item I: Welcome

Mr. Berry began the meeting at 10:02 a.m. He said Dr. Metzenbaum would co-chair the meeting today because Mr. Werfel was testifying before Congress. Mr. Berry then turned to some special announcements he made before proceeding with business on the meeting agenda.

Presentation of Theodore Roosevelt Award to Mr. Gage

Mr. Berry announced that Mr. Gage would retire this August. Mr. Berry then spoke in high praise of Mr. Gage and presented him with OPM's Theodore Roosevelt award. Mr. Berry said:

John's first love did not take him immediately into the federal service after college, but onto the grassy infield for a short stint with the Baltimore Orioles! Federal employees are fortunate that he then began a career as a disability examiner for the Social Security Administration in 1974. As a son of a Pittsburgh steel worker and union member, John saw the value in organized labor. He quickly became involved with AFGE through AFGE Local 1923 and eventually was elected president of local 1923 in 1982. Undoubtedly, his tireless efforts and commitment to AFGE and organized labor led to his election as AFGE's national president in 2003.

John has been a passionate and highly effective labor leader for years. John long ago recognized a simple and profound idea - that labor and management achieve more when we work together. John also recognizes that unions ensure fairness because people are empowered and organized. And when Federal unions and management work together, great things happen. Money is saved. Work conditions get healthier. People work smarter, and get the tools they need to succeed. Taxpayers get better service, at lower cost - because we work together.

Today, we would like to recognize John for his service. The Office of Personnel Management's highest honor, the Theodore Roosevelt Award, is given to those who are courageous in defense of our nation's Merit Principles. John, as a tireless defender of workers' rights, you embody the values of the civil service and protecting the Merit Principles. John, we thank you for your dedicated service to our Nation.

Mr. Berry then handed Mr. Gage the award, which was met with applause. Dr. Metzenbaum said she also wanted to thank Mr. Gage. She said he had done a million miles of walking in his work for Federal employees. She added she had admired his new shoes earlier, and asked if he

would show them to everyone. Mr. Gage said he was in the final throes of negotiations with TSA, and the bargaining team gave him new shoes, to help him through. He then put one foot up on the table to show everyone he was wearing black Chuck Taylor athletic shoes with “TSA” embroidered on the sides, and said, “Well, I have to get back over there.” As Mr. Gage exited, Mr. Gould added his praise and thanks, and people applauded.

Interim Regulation Providing Health Benefits Coverage for Certain Firefighters

Mr. Berry announced the publication of an [interim regulation](#) amending the Federal Employees Health Benefits Program (FEHB) regulations to make certain firefighters hired under a temporary appointment eligible to be enrolled in a health benefits plan under the FEHB. Mr. Berry said the interim regulation was a labor-management success story, and added “It couldn’t have happened without the amazing trust built around this table.”

Mr. Berry continued, “After President Obama surveyed the damage to communities in Colorado on June 29, he gave direction to ensure that the brave men and women who compose our nation’s Federal firefighter ranks are eligible for the same health insurance available to other Federal employees, retirees, and their families.”

Mr. Berry said publication of the interim regulation such a short time after the President’s call for the FEHB extension would have been impossible without the valuable input organized labor provided. He said, “The ability to work with our labor partners and the trust established through partnership allowed us to work out a solution and provide health benefits to more than 15,000 employees less than 20 days after the President visited Colorado.”

Mr. Berry said copies of the interim regulation were provided to Council members today. He explained that while the interim regulations are effective now, there is a 60-day comment period during which the public can provide feedback.

Mr. Berry thanked the Departments of Agriculture and Interior and Mr. Dougan for working with him to publish the regulation. He reiterated, “This is really an outgrowth of this table.”

Mr. Dougan said the regulation was in large part the culmination of work the National Federation of Federal Employees (NFFE) had been at for a number of years. He acknowledged the regulation was good progress, but added, “This is a first step; there’s still more work to do.” He said NFFE will continue efforts underway to extend benefits to other temporary workers who do important work in support of firefighting.

Administrative Matters

Mr. Berry announced that, as required under the Federal Advisory Committee Act, later in the meeting the Council would invite comments from the public. He asked that members of the public wait until then to address the Council.

Before proceeding with the agenda, Mr. Berry said the draft minutes of the previous meeting included all the Council's edits so far, and asked if there were any more changes. The Council unanimously approved the minutes with no further revisions.

Agenda Item II: GEAR Updates

By way of review of the Council's work on GEAR (Goals-Engagement-Accountability-Results), Mr. Berry reminded everyone that—

- In November 2011 the Council received the GEAR recommendations on employee performance management.
- Five pilots are underway (at OPM, the U.S. Coast Guard, and the Departments of Energy, Housing and Urban Development (HUD), and Veterans Affairs (VA)).
- The Council heard GEAR updates from the OPM and Energy pilots in February 2012.

Mr. Berry said Tim Curry, OPM Deputy Associate Director, Partnership and Labor Relations, would provide a quick summary of progress/collaboration among the pilots and then turn it over to speakers from HUD and the VA to provide updates on their GEAR pilots' progress.

GENERAL UPDATE ON GEAR PILOTS

Mr. Curry said the pilots had been coming together periodically to collaborate. He added that the pilots had also been uploading information on MAX.gov, and he said anyone with a Government email address could register for an account on the website and find data on the pilots in a section available for interagency collaboration. He said that in addition to the GEAR updates today by HUD and VA, other pilots would provide GEAR presentations in the September 2012 Council meeting.

GEAR UPDATE FROM THE HUD PILOT

Mr. Joseph Smith, General Deputy Assistant Secretary for Housing, provided an update on the HUD pilot. His presentation was accompanied by slides labeled "Department of Housing and Urban Development GEAR Update."

Mr. Smith's presentation described how the HUD GEAR pilot approached achieving four of the major GEAR goals: articulating a high performance culture; aligning employee performance management with organizational performance management; implementing accountability at all levels; creating a culture of engagement.

Articulating a High Performance Culture

Mr. Smith said that three major HUD efforts were moving the agency forward in pursuit of this major GEAR goal.

1. As part of the HUD “Focus on Feedback” initiative in [HUD's Annual Performance Plan for Fiscal Years 2012-2013](#) developed in response to employee dissatisfaction indicated in the HUD’s Employee Viewpoint Survey (EVS), HUD set these goals:
 - Improve employees’ performance plans to reflect the work they do and set clear expectations.
 - Increase the quality and timeliness of feedback to employees and provide meaningful incentives to employees.
 - Enhance or replace the ePerformance system.
2. Establish the Fiscal Year (FY) Performance Management Framework, which includes employee empowerment standards, establishing a “line of sight” between Senior Executive Service (SES) members and employees, and a succession planning process.
3. Implement a process for establishing HUD core values.

Align Employee Performance Management with Organizational Performance Management

Mr. Smith summarized HUD efforts toward this GEAR goal during FY 2012:

- Established Board of SES members to institute performance management policy and direction.
- SES Board implemented new SES performance plan framework for FY 2012.
- Establish game changer standards. If 5% increase in EVS, SES members can be rated outstanding.
- SES Board brought in Project Assistance Contracts (PACs) managers who also implemented the new framework
- Labor Management Advisory Committee (LMAC) redesigned the Employee Performance Planning and Evaluation System framework (10 members, with 5 management members and 5 labor members representing all 4 HUD unions).

Mr. Smith said the LMAC designed a new Performance Framework for FY 2013, which is shown on page 4 of his slides. The framework shows HUD’S strategy for aligning performance SES objectives with OPM Executive Core Qualifications and includes objectives that cascade down to employees. Mr. Smith mentioned (and a graphic on slide 4 reinforces) that the redesigned Employee Performance Planning and Evaluation System builds has significant employee empowerment features.

Mr. Smith said HUD developed its *Personal Investment* performance element to foster a culture of shared responsibility between employees and supervisors with regard to an employee’s

personal development and in shaping/supporting HUD's mission. He added the element is also intended to encourage employees to embrace and advocate for continuous improvement and change.

Mr. Smith touched on a few other HUD efforts in support of the major GEAR goal, e.g. new agency performance goals, *Books of Business* (i.e. program objectives), movement from a three-level to a five level performance rating system, and having program and support offices meet at the end of each FY to define specific goals and document them in a service agreement.

Implementing Accountability at All Levels

Mr. Smith displayed a slide (page 7) showing the structure of the "Focusing on Feedback" Transformation Project Team. At the highest levels of the structure are the Deputy Secretary, the Chief Human Capital Officer, and the Director of Strategic Planning and Management. Mr. Smith is shown just below the latter two top HUD officials as Project Manager, with a group of SES members called the "Game Changer Committee" just below him, and below that level are various boards and working groups, and committees who work to achieve the Focus on Feedback initiative. He then showed a series of status reports by HUD office showing the rate of daily/weekly status reports, e.g. rate of performance plans established and reviews completed, and other measures the team strives with a common focus to improve.

Mr. Smith covered HUD's guidance for in-service days to be devoted to improving performance management and communication between managers and employees. (The in-service days are part of [HUD's Annual Performance Plan for Fiscal Years 2012-2013](#). Also, see slide 11 of Mr. Smith's presentation for detail on guidance for in-service days.). He then covered HUD's new ePerformance system (see slide 12), which he said is made available to all levels of employees.

Creating a Culture of Engagement

Mr. Smith said that, with regard to this GEAR goal, "HUD is fully engaged; that's really the bottom line." As examples he cited expanded employee engagement sessions (in-service days), the HUD Secretary's quarterly town hall meetings, weekly progress emails to all executives and managers, monthly meetings of the PACs Leadership Roundtable, monthly Regional Roundtable meetings, and a quarterly SES Summit. (He said an SES summit was going on right now).

Council Discussion on the HUD Update

Mr. Dougan asked why the weekly progress emails shared with executives and managers that Mr. Smith just mentioned were not also shared with employees. "Is there any reason?" Mr. Smith responded, "No real reason. The idea started with the SES summit out of a desire to be informed, and since has been expanded to PACs managers." He said further expansion was likely.

Mr. Bransford said he had concerns with SES performance management aspects of the pilot, especially with the game changer performance element the briefing described. He said he had

developed a general concern when digesting the meeting read-aheads that the pilot appeared to overemphasize SES performance. He said of the requirements for SES members to receive outstanding performance ratings, "I don't remember GEAR being about that." He added, "Also, I don't remember hearing about training. Can you talk about that?"

Responding to Mr. Bransford, Mr. Smith said, "We're trying to select a Chief Learning Officer. We do have a 1-day program called 'I Love Feedback.' We also had a consultant on board and now have a hotline managers can call. Regarding game changing, that's been revised for 2013. We basically said, 'Don't just put that on SESers, and we replaced some former requirements for SESers with the Personal Investment goal, which applies up and down.'" He added that SES members are looked at as critical leaders and called attention to the succession planning piece of the HUD pilot's GEAR model, which is intended to expand opportunities for SES development to all employees.

Dr. Metzenbaum praised the HUD model's emphasis on feedback, and its use of EVS to inform performance management.

Ms. Kelley said she saw no words attached so far to rating levels one to five, and questioned how HUD can be sure a three has the same meaning for different employees. She said that surely good descriptive terms would be key in making meaningful performance distinctions. Mr. Smith responded that Ms. Kelley's observation was valid, and that the SES Game Changer Committee is asking the same question and trying to develop a strategy for meaningful descriptors. He added that in the very near future the Secretary plans to issue guidance on using the five levels. He said he knew definitions had been drafted, but added, "I don't know if they'll stick."

Regarding the definitions for rating levels, Ms. Kelley asked if firm definitions of the rating levels would precede actual use of them, and Mr. Smith responded, "Yes."

Ms. Kelley said that another concern she had was use of the EVS in the HUD model. "I don't know how it works in HUD," she said, "but sometimes it gets framed as, 'Let's do better than other agencies,' and it then becomes more like a contest than a tool to make things better." She added that, although she does not represent SES members, such a strong linkage between EVS scores and performance ratings gives her pause because of the tendency some agencies have to use the surveys in ways other than those intended, i.e. competitively more than constructively.

Ms. Kelly raised another concern. She said, "One of the things I've seen happen is managers are rated as outstanding and none of their employees are. How can that be? I think in looking at how managers are rated, someone needs to be asking that question."

To Ms. Kelley's comment regarding use of the EVS to compare counterproductively with other agencies, Mr. Smith responded, "As managers, we are about 1,500. Staff is telling us they don't like us. The Secretary is saying, 'We need to do something about this.'" Our understanding is we need to move forward by 5 percent in 2013. We're more concerned about our own health than how we compare to other agencies."

Dr. Metzenbaum said she believes this Administration has used EVS productively as a tool for improvement more than it was previously. She briefly mentioned some of the capabilities of

EVS, including the ability to drill down to specific elements. She noted some of the Administration's improvements in the EVS, which include changing it from a biennial to an annual survey and, in 2012, taking the survey Governmentwide for the first time ever.¹ Ms. Kelley said she does not disagree the EVS can be used effectively to improve performance, but that she has heard from employees that often things do not change for the better based on EVS reports. She said action on goals set based on EVS results is a work in progress.

Mr. Berry agreed with Ms. Kelley's comments regarding use of EVS. He said, "We're working to make it less a game and more a tool to show where agencies can improve. Agencies that take the game approach quickly learn they need to focus on using EVS as a tool for results. Those who take the game approach learn from subsequent survey results that a game mentality doesn't work. I think this Council may be able to play a role in making better use of EVS, and the Council may want to work on that in the future." He then turned to the GEAR update from VA.

GEAR UPDATE FROM THE VA PILOT

Mr. Larry Ables, Director, Employee Relations and Performance Management Service, Office of Human Resources Management, VA, provided an update on the VA National Cemetery Administration (NCA) GEAR pilot, using slides labeled "VA GEAR Report."

Mr. Ables explained that NCA's mission is to provide burial spaces for veterans and eligible family members, to maintain national cemeteries and to provide grants to state veterans cemeteries. He said NCA had achieved the [top customer satisfaction rating](#) in the American Customer Satisfaction Index. He added that the VA maintains 3.1 million gravesites in 131 cemeteries.

Mr. Ables' presentation described how the VA GEAR pilot approached achieving the five major GEAR goals: articulating a high performance culture; aligning employee performance management with organizational performance management; implementing accountability at all levels; creating a culture of engagement; and improving the assessment, selection, development and training of supervisors. For each GEAR goal, Mr. Ables covered VA's key actions in pursuit of the goal and explained how the actions are accomplished.

Articulating a High Performance Culture

Mr. Ables said that, to reinforce NCA's high performance culture, VA established the NCA Performance Management Integration Board, which is composed of NCA's top level executives who oversee GEAR implementation. He said the Board announced to the entire NCA workforce the pilot's heightened focus on strategic goals and described in clear terms what "high performance culture" means for NCA. He said that the Board issues a monthly newsletter, that the first issue emphasized the importance of "extraordinary performance" and that future issues will keep employees apprised of GEAR initiatives under the pilot.

Align Employee Performance Management with Organizational Performance Management

¹ See "[2012 Employee Viewpoint Survey - Employees Influencing Change.](#)"

Mr. Ables said key actions for this GEAR goal included aligning performance expectations with NCA goals, standardizing performance plans, educating employees on NCA goals and performance standards, helping employees see impact of work on mission, and fully engaging labor unions. He described the process by which new performance plans, which will be effective October 1, 2012, are being developed, e.g. NCA leaders, subject matter experts, and NCA's labor-management forum will work together to develop, implement, and communicate new performance standards. He said performance measures will address quality, quantity, timeliness, and customer service.

Implementing Accountability at All Levels

Mr. Ables said a three-step performance management progress review process would be implemented at NCA. He said VA would ensure proper tools are provided for performance management processes, that supervisors would be trained to ensure they understand their role in performance management, and then be held accountable in fulfilling it.

Mr. Ables said employees would have no less than three progress reviews during a year, and that in these review meetings overall NCA performance and the employee's contributions would be discussed. He said guides, templates and checklists are being developed for supervisors to use in this process. He said NCA will also take advantage of training on [HR University](#); that supervisor performance plans are being refined to clearly describe employee development and performance management, and that a program will be developed to recognize outstanding supervisors.

Creating a Culture of Engagement

Mr. Ables said VA is working to enhance NCA employees' perceptions regarding engagement and organizational commitment and establishing a mentoring program for new employees and supervisors and an onboarding program to speed up new employees' time in reaching full productivity. He described work to analyze EVS results and determine what can be done to enhance employee experiences and perceptions. He summarized efforts to set up a pilot mentoring program at some cemeteries and figure out how the mentoring programs should operate. He said the onboarding program he mentioned would run the 1st year of an employee's NCA career.

Development and Training of Supervisors

Mr. Ables said the current methods used to assess, develop and train NCA's supervisors will be evaluated, and will include review of retirement projections, vacancies and workforce needs; identification of competencies critical for success in supervisory positions in 2015 and beyond; and research and evaluation of best practices in private and Federal sector organizations. He added that recommendations addressing short and long term workforce needs, including methods used to select supervisors, will be developed, evaluated, and implemented.

Council Discussion on the HUD Update

Regarding scope and future plans for the pilot, Mr. Ables said VA was starting by implementing the GEAR pilot in one NCA region, and that VA will then evaluate the results, make any needed adjustments, and then expand the pilot to other regions.² He then invited questions or comments from the Council.

In response to a question from Dr. Metzenbaum on the extent of NCA facilities now covered and the scope of deploying the pilot across the remaining regions, Mr. Ables said the current pilot covers about 25 percent of NCA's workforce.

Mr. Gould praised NCA and Under Secretary for Memorial Affairs Steve L. Muro. He said Mr. Muro had started his amazing career as an automotive mechanic at a VA cemetery. He said that in the GEAR effort Mr. Muro had been very involved and was physically present to provide senior leadership involvement in meetings on the pilot.

Dr. Metzenbaum thanked Mr. Ables and highly praised the pilot. Acknowledging top management support from Mr. Gould, Mr. Ables said, "The Deputy Secretary has been with us."

Mr. Berry said the Council would now move on to a presentation by the National Aeronautics and Space Administration (NASA) on predecisional involvement (PDI).

Agenda Item III: Predecisional Involvement

Ms. Tiffany Shuffert, Human Resource Specialist, NASA, and Ms. Rhoda Hornstein, Vice President, NASA Headquarters Professional Association (NHPA)/IFPTE Local 9, gave a presentation on PDI at NASA. They used slides labeled "NASA's Labor Management Forum and Predecisional Involvement."

Describing how efforts to improve PDI at NASA began, Ms. Hornstein said, "We use EVS." Referring to the 2011 EVS results for NASA, she added, "We looked at Question 64." (*How satisfied are you with the information you receive from management on what's going on in your organization?*)

Ms. Hornstein said there are three unions at NASA: IFPTE (of which NHPA is an affiliate), AFGE, and the Washington Area Metal Trades Council. She said that these unions together represent 52 percent of the NASA workforce. She said IFPTE and AFGE have National consultation rights, that collective bargaining agreements exist at the subcomponent level, and that 8 of NASA's 10 centers have unions, and that the 8 centers with unions have 9 forums operating. She then displayed slides showing the NASA employment distribution across NASA's components and by union affiliation (data as of January 14, 2012), and the frequency of forum meetings.

Ms. Hornstein contrasted PDI before and after Executive Order 13522 (the EO). She said that, before the EO, several centers had partnership councils/forums, and that more than one center engaged in "PDI" before the term existed. She said that, after the EO, PDI has greatly increased, higher level and more complex topics are addressed with PDI, and most PDI occurs without the need for formal meetings. NASA labor now participates in all NASA council meetings and is

² The NCA consists of [5 memorial networks](#).

involved at the highest levels. She added that the labor-management relationship is much stronger due to these changes.

Ms. Shuffert and Ms. Hornstein provided examples where NASA projects were subject to PDI, and with much success:

- Agency Projects
 - Changes to the Honor Awards Program,
 - Changes to science proposal processes,
 - Furlough communications for all employees,
 - Emergency Notice and Accountability System,
 - Workforce Stress Snapshot,
 - Travel Card Salary Offset Process,
 - Labor relations policy, and
 - Reorganization of two major organizations.

- Center PDI Examples
 - Office reorganizations,
 - Furlough planning and communications,
 - Budget and staffing reduction priorities and plans,
 - Building lease renewal and renovation,
 - Early Out and Buy Out Plans,
 - Telework pilots,
 - Center services budget cuts, and
 - Establishment of Employee Resource Groups.

Ms. Shuffert noted that major agency projects can be completed more quickly now because of the NASA unions waiving National Consultation Rights (NCR) on all PDI topics, which shows how much the Government gains from PDI.³

Ms. Hornstein discussed challenges to PDI and the solutions applied at NASA. She said that with only 7 labor representatives and a workforce of about 18,000 employees, priorities have to be set and the focus needs to be on big ticket items. “We make mistakes,” she acknowledged, “but we always fix them.” She said educating everyone on the need for PDI is a challenge NASA meets with presentations to senior management on labor relations requirements under EO 13522, and with a PDI Reference Guide that includes examples of best practices. She added that, where there is a negative perception of PDI, solutions include education (including the PDI Reference Guide), reassurance from the Labor Relations Officer, and a focus on trust building.

³ As explained in a December 2011 [letter](#) from NASA labor-management forum Co-Chair Lori Garver, increased implementation of PDI has increasingly led to labor waiving NCR, which reduces the timeline for implementing agency policies, e.g. a 30 day comment period and a written response by management required under law where NCR applies.

Page 9 of the presentation lists examples of PDI best practices from NASA's PDI Reference Guide, which the speakers provided to the Council members. After briefly covering these examples, the speakers invited questions or comment.

Mr. Bransford asked whether PDI occurs at all levels from the top down, i.e. is it fully part of the NASA culture. Ms. Shuffert responded that efforts are continually underway to make PDI part of the NASA culture.

Mr. Berry said, "Frankly, NASA used to be one of our trouble spots. There's been a light year of improvement over the past 2 years." Mr. Berry said a lot of hard work was required, and added, "The issues you've dealt with clearly show PDI has been taken seriously. Congratulations to everyone involved. Thanks very much!"

Mr. Dougan said, "I want to commend you on your PDI guide. This could be generalized and become *the* guide for the rest of the Federal Government. I encourage the Council to use this as a resource." Mr. Berry responded, "We're definitely looking at best practices and the best way to do Governmentwide guidance."

Mr. Berry asked that his thanks be conveyed to everyone involved in NASA Partnership for the extraordinary progress on PDI, and then he said the Council would now hear from the Metrics Working Group.

Agenda Item IV: Metrics Workgroup

Mr. Filler began the working group's update on its PDI measurement project. He said, "We were kind of like American Idol. We were looking for success stories. You just heard a presentation from NASA and that's one we were able to find." He said that identifying Partnership success stories was a practice during the Clinton Administration, but that what is different now is a focus on remedying system failures. He made the point that effective use of metrics provides an opportunity to find out what works, but also what does not work and needs to be fixed. He then turned the floor over to Mr. Curry, whose brief presentation was accompanied by slides labeled "Metrics Working Group."

Mr. Curry said the metrics working group interviewed representatives from 11 labor-management forums (some by telephone and some in person) at various agencies and found:

- Mixed results: some forums are utilizing PDI successfully and some forums still need assistance.
- Common themes existed among the forums relating to PDI.
- Most forums experienced at least one challenge with the use of PDI.
- Some suggested that further guidance on PDI would have been helpful in defining PDI for their use.

Mr. Curry said the working group is trying to set up additional interviews, and to Mr. Filler's point in his introductory remarks, the hope is to capture challenges, not just success stories. He said that PDI is often an entirely new way of doing business, so naturally there is an adjustment period. He noted that despite its great success, NASA had its share of growing pains.

Elaborating on the point that some forums said further guidance on PDI would have been helpful in defining PDI for their use, Mr. Curry said that feedback highlighted the fact that PDI and associated needs can be different in different contexts.

Mr. Curry listed common themes in the working group's data from the interviews: ⁴

- Many forums were using PDI before the enactment of E.O. 13522 and invention of the term PDI.

Issues are often raised at forum meetings and discussed using PDI before any formal bargaining takes place.

- E.O. 13522 has had a positive impact on labor-management relationships.
- PDI has saved time and money for many agencies, e.g. fewer grievances, unfair labor practice filings, reduced time to negotiate, etc.

Mr. Curry listed challenges to PDI reported by the forums during the interviews:

- Forums experienced difficulties in developing metrics to show value added by using PDI.
- PDI training for lower level managers and supervisors is needed on a yearly basis.
- Changing personnel makes consistent use of PDI difficult.
- Parties often have differing ideas about the scope and timing of PDI discussions.

Mr. Curry mentioned some notable examples of successes and challenges the working group found:

- One agency's national level forum (NASA's) developed their own PDI guidance for managers and supervisors.
- Another agency's forum explained that most PDI initiatives are conducted at the headquarters level.
- Before a major move was decided, one agency engaged the union very early and it proved to be beneficial.

⁴ See also the working group's one-page handout labeled "Predecisional Involvement Interviews: Common Themes and Challenges."

- Representatives from one forum stated that they need more guidance on discussing the budget through the PDI process.
- One agency forum reported smoother impact and implementation bargaining because the union was involved at an earlier stage in the decision making process.
- A labor representative from one forum stated that PDI depended on what executives were running the LR department.
- Another forum agreed that efforts at PDI have been “piecemealed at best.”

Mr. Curry said the working group developed some suggestions on how the Council can help forums make progress on PDI:

- Further assistance from the workgroup to aid forums with questions relating to 1) the use and scope of PDI for specific, commonly occurring issues, and 2) Metrics relating to the use of PDI.
- Assistance could be provided by identifying best practices among agencies or third party facilitation (i.e. the Federal Labor Relations Authority and Federal Mediation and Conciliation Service).

After Mr. Curry yielded the floor for questions or comments, Ms. Rosen said that, regarding budget issues, AFGE has noticed at times a tendency to hide budget issues from union members based on confidentiality concerns. Dr. Metzenbaum said that, regarding that concern, the Administration is trying to find the best way to maximize the sharing of budget matters while not crossing the line on confidentiality. The Council then turned to the next agenda item.

Agenda Item V: Career Development Workgroup

REVIEW OF WORKING GROUP ACTIVITIES TO DATE

Ms. Rosen led an update from the Career Development Working Group, which the Council agreed to form in its February 2012, meeting, and that the working group was to emphasize college credit for job training and expansion of career ladders. She reminded everyone that, in the February 2012 meeting, the Council agreed to put a discussion of career development on the Council’s agenda for the March 2012, meeting. She reminded everyone of the update the working group provided in that meeting, i.e. her report of the working group’s March 8, 2012 preliminary discussion/brainstorming session, and that the Council had asked the working group to continue its work. She said that, as planned/announced in the March Council meeting, the working group looked into whether agencies need OPM approval to create career ladders and found they did not. The working group then provided an online web presentation of mycareeratva.va.gov, beginning with introductory remarks by Mr. Gould.

DEMONSTRATION OF VA CAREER DEVELOPMENT TOOL

Mr. Gould described the common experience of employees reaching points in their career where they feel stuck and want to figure out ways of advancing. He then yielded the floor to Ms. Alice Muellerweiss, Dean, [VA Learning University](#), and Carolyn Kurowski, Vice President, Federal Management Partners, Inc.

Ms. Muellerweiss began a general overview of the new online career development tool. She said the agency quickly recognized a need for effective career development strategies, since the number one reason people leave organizations is the lack of path for advancement. She said, “We developed a matrix model. Our people can empower themselves to chart their own path.” She added that the website was implemented from concept to delivery in less than 13 months. She said the system now covers about 75 percent of VA’s mission critical occupations, and the goal is to cover all VA occupations by April 2013.

Ms. Kurowski demonstrated the site, and explained its three key tools: [My Career Mapping Tool](#), [My Career Fit Tool](#), and [VA Career Guides](#).

My Career Fit Tool

Ms. Kurowski demonstrated the My Career Fit tool. She said its purpose is to find out what careers fit given a user’s interests and background. She said a design goal had been to make the tool easy and engaging. She showed how users can tell with a visual graphic whether a job is a great, good, or minimal fit. She said, “Users can go in based on those and filter by experience level and the job family they’re in. She then processed an example, an entry-level budget analyst, on screen. “Here you can tell what’s expected,” she explained. “Duties, grade ranges, licensing and education requirements, knowledge areas, and critical competencies.”

My Career Mapping Tool

Ms. Kurowski displayed the My Career Mapping tool. “What are the career opportunities available in VA? So I select a starting job, where I am today. Let’s choose HR as the job family, then we’ll choose HR Assistant and pick a grade range. Users have help text throughout to help them enter what they do, and it shows options.” Nine potential opportunities appeared on the screen, with an option to show the next nine. She showed how within each selected job was information including competencies/knowledge areas, educational and licensing requirements, duties, work environment, links to job announcements for current openings (and then links to apply on USAJOBS, the number of VA employees in the position in 2011, and job outlook projections in the field by the Bureau of Labor Statistics. She showed how users could compare jobs and then, after selecting a job, have a career path mapped on screen with a progression of higher jobs. She showed a few other features of the tool, including an interactive map showing where jobs of interest are in VA.

VA Career Guides

Introducing the Career Guides tool, “Ms. Kurowski said, “What does the VA see as its careers and career areas?” She displayed the tool, which showed 19 occupational families from which users could select. Within a selected occupational family, the work and its importance to the

Government is described generally, and then users can select jobs with the occupational family for more information. There are also links to information on intern opportunities and other information, and a map showing the geographic distribution of jobs with the occupational family.

Council Discussion on the Demonstration

Mr. Berry said it was a great presentation and thanked Mr. Gould for his leadership, Mr. Gould said he was very pleased with the outcome of the project, and Dr. Metzenbaum asked, “How can agencies tap into this?” Ms. Muellerweiss said agencies interested in adopting a similar system can reach out to her. She added that there is a lot of great web technology now that can help agencies provide similar career management resources.

Dr. Metzenbaum said career management systems like the VA has appear to have great potential for helping the Government close critical skills gaps. She said she would be very interested to hear user feedback, and added, “Maybe we should involve innovation and technology officers.”

Mr. Moteff asked what VA’s expectations are regarding the tool’s ability to increase promotions, and Ms. Muellerweiss, Mr. Gould, and Mr. Berry all responded. Ms. Muellerweiss said, “This is a tool we believe will level the playing field. This allows people to take charge of their careers.” Mr. Gould added that VA wants all its employees to succeed and advance. “Our position is we want people to develop as quickly as they can. Our job is to get people and get them new opportunities.” but we want people to be successful in their careers and if they can’t get promoted at VA they should seek opportunities elsewhere.” Mr. Berry said, “It’s up to the agency to recognize the talent pool, but it’s important to have long term strategies for career management in mind.”

REMAINDER OF WORKING GROUP PRESENTATION

The Council planned that, after the VA web demonstration, Ms. Rosen would continue with the remainder of the working group presentation, but since the Council was behind schedule in covering the agenda, Mr. Berry suggested that perhaps the rest of the presentation could be made in the next meeting. Ms. Rosen said she would like to continue, but quickly, since she had important recommendations to present to the Council. Mr. Berry agreed.

Ms. Rosen quickly covered pages 5-9 of her slides, and briefly discussed college credit programs at DHS, OPM partnerships with several colleges in the Washington, DC, area, and a number of academic resources the Government can/does leverage to fill critical skill areas. She then listed conclusions, next steps, and recommendations:

- The Working Group felt that all of these programs are pieces that can work together to improve career development:
 - Easy access to career planning information,
 - Development of courses to fill gaps and critical needs,
 - College credit for agency training,
 - Academic partnerships,

- Sharing across agencies and departments, and
 - Government-wide strategic approach.
- The Working Group believes the VA job-tracking model is worth expanding to other agencies government-wide.
 - Employees will have access to excellent career development tools.
 - Agencies will have a greater strategic understanding of their occupations, skills gaps, and training needs.
 - There is a need for guidance on how to get college credit for agency training.
 - Establish a subcommittee of the WG to explore what is already out there, such as VA, HRU, USAJOBS, agency-specific programs, etc.
 - See if these can be connected strategically.
 - Share best practices and eliminate redundant efforts.
 - What new programs need to be developed?
 - Subcommittee should include training and learning experts.
 - Involve Chief Learning Officers Council (CLOC).

Mr. Berry thanked the working group for its recommendations. Regarding the working group recommendation to establish a separate subcommittee, he said, “I don’t want to create a structure where we go beyond the working group level. I think recommendations could be done by the working group. I would encourage the working group to keep going though, and work towards a more strategic effort Governmentwide.”

Ms. Rosen said, “That’s fine. Thanks to DHS and VA for stepping forward.” She called for other agencies to support efforts toward improving career management and opportunities for employee development Governmentwide. Mr. Berry said, “I volunteer Joe Kennedy and Kathryn Medina to help out.”

Ms. Rosen said she thought it was important that the guidance the working group recommended be a product of the Council. Mr. Berry responded, “Keep going. The next step is to get going with the Chief Learning Officers Council.”

Agenda Item VI: Discussion of (b)(1) Pilots

Mr. Curry provided a brief update on the Council’s efforts to expand (b)(1) pilots, as recommended in the Council’s [Report to the President on Negotiation over Permissive Subjects of Bargaining: Pilot Projects](#). He reminded everyone of these report recommendations:

- Extend the duration and scope of the pilot projects to provide further evaluation of the effectiveness of negotiating over permissive subjects of bargaining

- Invite current twelve projects to continue for 2 additional years
 - Solicit new pilots from additional agencies/departments
 - Endeavor to ensure sufficient representation of pilots bargaining full scope of (b)(1) subjects
 - Take steps to ensure ALL pilots are trained
 - Encourage pilots to select issues based on strategic/operational plans
 - Provide sufficient support and oversight to pilots
 - Collect data and evaluate outcomes over entire period
- Urge all agencies to have pre-decisional discussions of (b)(1) subjects with their unions in accordance with E.O. 13522
 - Remind all agencies that they may elect to bargain over (b)(1) subjects
- Encourage agencies and their unions to participate in pilot projects

Mr. Curry said his office had reached out to agencies to solicit more pilots. Mr. Berry said, “This changes the date from August 15 to September 15. Let’s really see if we can get folks to take it to the next level.”⁵

Mr. Dougan said, in the next meeting (September 19, 2012) the Council should probably devote time to talk about additional guidance and how to refine guidance for the pilots, and that FLRA and FMCS should be involved. Mr. Berry agreed, and moved on to the next agenda item.

Agenda Item VII: New Business

Mr. Berry said OPM is working on a new benefit, phased retirement. “As we try to stand it up appropriately, I think this Council can help. We don’t need a full work group, but we’ll seek feedback from everyone.” The Council raised no further new business, and Mr. Berry provided an opportunity for public comment.

Agenda Item VIII: Acknowledgment/Receipt of Public Submissions

There were no comments from the public.

Agenda Item IX: Adjournment

Mr. Berry adjourned the meeting at 11:57 a.m.

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⁵ Between this meeting and the previous one, in an email to senior agency officials soliciting more pilots, OPM asked interested agencies to respond by August 15, 2012. The Council decided to reach out to agencies again, with an extension of the deadline to September 15, 2012.

John Berry
Co-Chair

Shelley Metzenbaum
Acting Co-Chair