

United States Office of Personnel Management

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# Chief Human Capital Officers Council



## Report to the Congress FY 2012

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*a New Day for Federal Service*



United States  
Office of Personnel Management  
August 2013





UNITED STATES OFFICE OF PERSONNEL MANAGEMENT  
Washington, DC 20415

The Director

JUL 26 2013

The Honorable Joe Biden  
President of the Senate  
United States Senate  
Washington, D.C. 20510

Dear Mr. President:

As Chairman of the Chief Human Capital Officers (CHCO) Council, I am submitting the Council's annual Reports to Congress for Fiscal Years 2011 and 2012 in accordance with the reporting requirement established through section 1303(d) of Public Law 107-296, the *Homeland Security Act of 2002*.

During both years, the CHCO Council continued to serve as an important venue for the agency CHCOs to discuss human resources management policy issues and share best practices. The attached reports detail many of the Council's meetings, activities, and accomplishments through the past two fiscal years.

If you have any questions about these reports or the CHCO Council, please feel free to contact me.

Sincerely,

A handwritten signature in black ink, appearing to read "Elaine Kaplan".

Elaine Kaplan  
Acting Director

Enclosure







UNITED STATES OFFICE OF PERSONNEL MANAGEMENT  
Washington, DC 20415

The Director

JUL 26 2013

The Honorable John Boehner  
Speaker of the House of Representatives  
U.S. House of Representatives  
Washington, D.C. 20515

Dear Mr. Speaker:

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During both years, the CHCO Council continued to serve as an important venue for the agency CHCOs to discuss human resources management policy issues and share best practices. The attached reports detail many of the Council's meeting, activities, and accomplishments through the past two fiscal years.

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Elaine Kaplan  
Acting Director

Enclosure





# **Chief Human Capital Officers Council**

## **FY 2012 Report to Congress**







***A Message from OPM Acting Director Elaine Kaplan  
Chair, Chief Human Capital Officers Council***

As Chair of the Chief Human Capital Officers (CHCO) Council, I am pleased to present our Fiscal Year 2012 (FY 2012) report to Congress.

The CHCO Council continues to serve as an important hub for generating and distributing ideas and policies that improve management across the Federal Government. My Vice Chair, Steven VanRoekel, and I are proud to work with the Council to meet the new and ongoing challenges the Federal Government faces in the twenty-first century.

This year, the CHCO Council's involvement in improving the cooperation between agencies, payroll providers, and OPM's Retirement Services division resulted in a dramatic decrease in the rate of errors in incoming retirement packages. Eliminating errors greatly reduces the number and length of delays in processing retirement applications, and is a challenge that could only be addressed through the coordination across every agency - a textbook example of the effectiveness of the CHCO Council in improving human resources (HR) services.

The Council also exceeded expectations with the fourth annual Feds Feed Families drive. Federal employees collected 7.2 million pounds of food, helping local food banks across the country during critical summer months, and bringing the four-year total to over 15 million pounds of food collected.

The CHCO Council's HR University continued to save taxpayer money by providing over 100 online training courses for HR professionals. In its second year in 2012, HRU saved agencies an estimated \$25.3 million, and served over 16,000 Federal employees.

These are just a few examples of the way that the cooperative, cross-agency approach embodied by the CHCO Council is effecting change Governmentwide and providing better and more efficient HR services. In the year ahead, the CHCO Council will continue to act as the Administration's primary collaboration mechanism for driving HR management reform across Federal agencies.

I appreciate the Congressional leadership and support for the CHCO Council. I look forward to sharing our successes and challenges with you as the Council continues to work together to move urgent HR reforms forward.

This report can also be found on the CHCO Council's website at [www.chcoc.gov](http://www.chcoc.gov).

A handwritten signature in black ink, appearing to read "Elaine Kaplan". The signature is fluid and cursive, with a long, sweeping underline.

Elaine Kaplan  
Chair





## *A Message from the Executive Director of the Chief Human Capital Officers Council*

I am pleased to introduce to you the Chief Human Capital Officers (CHCO) Council Annual Report for FY 2012. This year, the Council capitalized on cross-agency collaboration to consolidate and improve upon Human Resource (HR) practices and resources.

The Council conducted 10 Full Council meetings and covered a variety of topics from retirement processing to closing skill gaps. The working groups continue to demonstrate measurable results, and agency CHCOs continue to engage in Council activities that impact and improve the way we do business across the Federal Government.

The Council hosted three Flash Mentoring sessions this year, providing over 260 HR professionals with valuable management and career development skills. Additionally, the CHCO Academy Program held six sessions and trained over 1,200 HR professionals in currently needed topics including performance management, project management, and building a healthy retirement case file.

We've had many successes in FY 2012 and look forward to the Council's continued efforts to improve the Federal workforce in the coming year.

A handwritten signature in black ink that reads "Kathryn Medina". The signature is fluid and cursive, with the first name "Kathryn" and last name "Medina" clearly distinguishable.

Kathryn M. Medina  
Executive Director





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## **Executive Summary and Background**

The Chief Human Capital Officers Act of 2002, enacted as part of the Homeland Security Act of 2002 on November 25, 2002, required the heads of 15 Executive departments and 9 additional agencies to appoint or designate Chief Human Capital Officers (CHCOs) and to establish a Chief Human Capital Officers (CHCO) Council.

Specifically, the Act established the CHCO Council “to advise and coordinate the activities of the agencies of its members on such matters as modernization of human resources (HR) systems, improved quality of HR information, and legislation affecting HR operations and organizations.” The Act became effective date May 24, 2003 (180 days after enactment).

The Council is composed of the Director of the Office of Personnel Management (OPM), who serves as chair; the Deputy Director for Management of the Office of Management and Budget (OMB), who acts as vice chair; the CHCOs of the 15 Executive departments; and the CHCOs of additional agencies and the Small Agency Council, as designated by the OPM Director.

This year’s annual report to Congress outlines the key initiatives the Council led, or actively participated in, during FY 2012.

Since its inception, the Council has made tremendous strides in improving cross-agency collaboration within the Federal HR community. FY 2012 marked another successful and highly productive year for the Council. HR University, the first ever Governmentwide training initiative for the HR profession, reached over 16,000 users and achieved over \$23 million in cost savings. The Council also continued its work on a number of other high priority projects including diversity and inclusion, identifying ways to close skill gaps in the Federal workforce, and improving retirement processing across the Government. These efforts, combined with the most successful Feds Feed Families program in the history of the program, allowed the Council to demonstrate its continued strength and effectiveness as the leader of the Federal human capital community.







## **Council Meetings**

The Council meeting structure consists of four distinct recurring meetings. First, the Council holds monthly meetings of the Full Council, which includes all CHCOs and their Deputies. Second, the smaller group of CHCO Deputies meets bi-monthly to disseminate critical human capital information. Third, the Council sponsors regular training sessions called CHCO Academies, which are open to the entire Federal human capital community and cover a broad range of current and emerging HR practices. Lastly, the Council sponsors and hosts an annual CHCO Council Fall Forum, which is an extended day-long meeting of the CHCOs and Deputies, as well as key Federal HR officials from OPM, in a high level training, strategic planning, and best practice sharing exchange. These meetings ensure the Council is working efficiently toward its strategic goals and its mission. Each meeting is focused on promoting HR best practices, sharing emerging practices across agencies, identifying and addressing key concerns, and moving the Council's strategic goals forward in an efficient manner. Below are the FY 2012 meeting summaries.

### **Full Council Meetings**

The Full Council meetings, which were co-chaired during this reporting period by John Berry, former OPM Director<sup>1</sup>, and Shelley Metzenbaum, former Associate Director for Performance and Personnel Management, OMB, are held each month. The meetings are held at OPM Headquarters.

#### ***October 2011***

In lieu of the Full Council meeting in October, the CHCO Council held the Fall Forum, which took place on October 5-7, 2011. Please refer to the FY 2011 Chief Human Capital Officers Council Annual Report to Congress for more information.

#### ***November 2011***

Pursuant to the CHCO Council Charter, the November meeting was open to the public, and was attended by many labor relations and media stakeholders. Matthew Perry, Chief Information Officer, OPM, provided an update on USAJOBS. Joseph Kennedy, Deputy Associate Director for Employee Services, OPM, shared recent developments in the Veteran's Employment Initiative. Veronica Villalobos, Director of Diversity and Inclusion, OPM, provided an update on

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<sup>1</sup> Starting on April 14, 2013, Elaine Kaplan became Acting Director of OPM and thus will now chair these meetings.



the Governmentwide Diversity and Inclusion Strategic Plan. Several agency representatives shared best practices related to hiring reform on the following sub-topics: time-to-hire, manager involvement and partnership, application process and applicant satisfaction, and other innovative practices.

### ***December 2011***

John Berry, Chair, had several announcements related to the recent DC area dismissal guidance, the Combined Federal Campaign (CFC), and continued work on solutions to the retirement backlog. Director Berry also indicated that the 2011 calendar year was very successful with hiring reform and veteran's hiring, and that 2012 would focus on disability hiring and closing skill gaps. Angela Bailey, CHCO, OPM, provided an update on the workforce restructuring initiative. Raymond J. Kirk, Manager, Retirement Services, OPM, provided guidance on the OPM retirement process. Joseph Kennedy, Deputy Associate Director for Employee Services, OPM, presented the concept of reducing the reporting burden for human capital reporting. Additionally, each CHCO working group, including Hiring Excellence, Disability Hiring, HR University, Skill Gaps, and Performance Management, provided end-of-year updates. Finally, the Council discussed the 2011 Federal Employee Viewpoint Survey (FEVS) and agency-specific strategies.

### ***January 2012***

John Berry, Chair, outlined the Human Capital Priorities for 2012, including retirement processing, disability hiring, and diversity and inclusion. Additionally, focus will be placed on veterans' hiring, performance management, and closing critical skill gaps. Dr. Arun Seraphin, Principal Assistant Director for National Security and International Affairs, White House Office of Science and Technology Policy (OSTP), announced the recent initiative on recruiting, hiring, and retaining science and engineering talent. Latesha Love, Sr. Policy Analyst, Government Accountability Office (GAO), announced the Federal Training Investment Practices initiative, which is a new engagement between GAO and OPM related to training across the Government. Angela Bailey, CHCO, OPM, provided an update on the Student Pathways Program and the work of the Pathways Council. Andrea Bright, Manager of Classification and Assessment Policy, OPM, presented on the Government Performance and Results Act (GPRA) Modernization Act of 2010 functional competencies. Working Group chairs provided updates on the skill gaps and performance management working groups. Finally, Angela Bailey, CHCO, OPM, presented on the workforce restructuring and smart cuts conference series.

### ***February 2012***

John Berry, Chair, addressed the OPM response to the Congressional Budget Office (CBO) study on Federal wages and benefits, indicating that OPM is working on a formal response which



will highlight several discrepancies and inconsistencies in the study. Max Stier, President, Partnership for Public Service, addressed the Council about the memorandum of understanding (MOU) between the Partnership for Public Service and OPM to share Manager Hiring Satisfaction Survey and Applicant Satisfaction Survey data. William Doherty, Assistant Director, Government Accountability Office (GAO), provided a status update on the [Federal Training Investment Practices study](#). Jon Foley, Director of Planning and Policy Analysis, OPM, discussed the FEVS roll out and the Council discussed various ways to utilize the data. Representatives from Department of Energy and OPM presented on Goals, Engagement, Accountability, and Results (GEAR). Pat Tamburrino, CHCO, Department of Defense, presented on Skill Gaps and recent study findings.

### ***March 2012***

Dr. Michael Koehler, Program Analyst, Cyber Education Office, Department of Homeland Security, and Kirk Webber, Communication Lead for the Chief Information Officers (CIO) Council, IT Workforce Committee, provided a briefing on the National Initiative for Cybersecurity Education (NICE) IT Workforce Assessment for Cybersecurity. Working Group Chairpersons provided updates on the following working groups: Strategic Human Capital Management – High Risk Initiative, Disability Hiring, Retirement Processing, and Performance Management. The Council discussed HR University, the updates to [www.hru.gov](http://www.hru.gov), and a governance proposal. The Council then held a vote on the proposal to transition HR University to OPM by the fall of 2012. Finally, Mari Barr-Santangelo, CHCO, Department of Justice, led a discussion on “Best Places to Work” with a proposal for a new ranking order.

### ***April 2012***

Robert Shriver, Senior Policy Counsel, OPM, provided an update on the Pathways Program, the regulation effective date extension, and the proposed memorandum of understanding (MOU). Joseph Kennedy, Deputy Associate Director for Employee Services, OPM, presented on the HR Dashboard, which tracks various activities across agencies, to include retirement submissions, retirement elements input, etc. There was significant discussion on the efficacy of the data and its strategic versus tactical value. Justin Johnson, Deputy Chief of Staff, OPM, provided an update on the Retirement Processing Working Group and its three sub-groups – Automation, Process Improvement, and Policy & Training. Karlease Kelly, Deputy CHCO, USDA, provided an update on the Disability and Hispanic Hiring Working Group. Pat Tamburrino, CHCO, Department of Defense, presented on Strategic Human Capital Management, indicating that they are working toward hiring more employees with the skills identified as high-risk mission critical positions.

### ***May 2012***



Kathryn Medina, Executive Director, CHCO Council, introduced Duane Williams, Program Manager, U.S. Department of Agriculture, as the Program Manager for the 2012 Feds Feed Families food drive. Director Berry announced the upcoming Combined Federal Campaign (CFC). Robert Shriver, Deputy General Counsel, OPM, provided an update on the Pathways Program with the focus for the next 60 days to be on regulation implementation. Mary Beth Lepore, Chief, Strategic Human Capital Planning, Department of Defense, provided an update on the Strategic Human Capital Management Working Group. Steve Shih, Deputy Associate Director for Executive Resources and Employee Development, OPM, and Jim Trinko, Executive Director, Leading EDGE Program, Department of Veterans Affairs, presented on the Senior Executive Service (SES) Executive Leadership Development Program, the inter-Agency program to help executives address future challenges. Kathryn Medina, Executive Director, CHCO Council, and Joseph Kennedy, Deputy Associate Director for Employee Services, OPM, presented on metrics and the proposed development of a CHCO Council Dashboard. Finally, the Council conducted a special session with Senator John Warner (R., VA), who joined the forum to discuss the retirement process improvement effort and recent progress, with a presentation briefing by Paige Hinkle-Bowles Deputy CHCO, Department of Defense.

### ***June 2012***

John Berry, Chair, announced several new members to the CHCO Council, including Linda Thomas-Greenfield, CHCO, Department of State; Donna Seymour, Deputy CHCO, Department of Defense; and Sydney Rose, CHCO, Department of Labor. The Feds Feed Families food drive was recently kicked off and Director Berry expressed appreciation for all active participants. Mary Santiago Director, Veteran Employment Services Office, Department of Veterans Affairs, provided an update on the veteran's hiring initiative at the Detroit Hiring Fair. Katie Malague, Performance Manager, Office of Management and Budget, presented on the President's Management Council (PMC) Rotational Program. Veronica Villalobos, Director, Office of Diversity and Inclusion, OPM, presented on the Diversity and Inclusion Working Group with a particular focus on persons with targeted disabilities and Hispanics. Patricia Kasold, HR Specialist, Department of Defense, and Judith Rutkin, Manager, Agency Program Review, OPM, provided a status update on the Strategic Human Capital Management Working Group, and Donna Seymour, Deputy CHCO, Department of Defense, and Ken Zawodny, Associate Director of Retirement Services, OPM, provided an update on the Retirement Processing Working Group.

### ***July 2012***

John Berry, Chair, welcomed new CHCO Council members Jody Hudson, Deputy CHCO, Nuclear Regulatory Commission, and Maria Price-Detherage, Deputy CHCO, Health and Human Services. Director Berry also provided updates on the Feds Feed Families Program, the Presidential Management Fellows Program, phased retirement, and firefighter benefits. Shelley



Metzenbaum, Associate Director, OMB, highlighted the Pathways Program, explaining that it offers a great opportunity for agencies to improve their recruitment and hiring process. Matt Collier, Special Assistant, OPM, presented on the OPM website preview, requesting input and feedback from Council members on the new beta site. Mark Reinhold, Deputy CHCO, OPM, updated the Council on the next Labor Management Council meeting, the gender pay equality memo, National Security Professional Development (NSPD) update, and the Plum Book. Finally, working group members provided a status update on retirement process improvement, including the June error report, and the Leading EDGE Project.

### ***August 2012***

John Berry, Chair, announced updates to the phased retirement regulations and the latest figures from the Feds Feed Families Program. Marilee Fitzgerald, Director of the Department of Defense Education Activity, Department of Defense, presented on the Science, Technology, Engineering, and Mathematics (STEM) Outreach initiative. Kathryn Medina, Executive Director, CHCO Council, discussed the NSPD Charter and John Sepulveda, CHCO, Department of Veterans Affairs, provided an update on the VA for VETS training event. Working group members provided updates on the Diversity & Inclusion and Retirement Process Improvement Working Groups.

### ***September 2012***

In lieu of the Full Council Meeting in September, the CHCO Council held the 2012 Fall Forum, which took place on September 20, 2012, at the Department of Transportation. Please refer to the Fall Forum section, which begins on page 13, for detailed information.

### **Deputy CHCO Meetings**

The Deputy CHCOs hold their own bi-monthly meetings to discuss additional items of interest to senior human capital managers. These meetings are chaired by the Executive Director, and provide a forum for the Deputies to delve deeper into the policy issues raised during the Full Council meetings and allow them to exchange best practices and form collaborative partnerships. The Deputy CHCO Meetings are held at OPM Headquarters.

### ***November 2011***

Todd Cox, Director of the Office of Communications and Legislative Affairs, Equal Employment Opportunity Commission; Melanca Clark, Senior Counsel, Department of Justice; and Cedric Hendricks, Associate Director, Court Services and Offender Supervision Agency; presented on the subject of Federal hiring policies regarding formerly incarcerated individuals. Gerald Talbot, Director, National Security Professional Development Integration, OPM,



presented on the Pathway Pilot. Vic Karcher, Acting Director, Enterprise Human Resources Integration (EHRI) Office, OPM, presented on EHRI. Tara Ricci Classification and Assessment Policy Office, OPM, presented on competency-based qualifications. Judith Rutkin, Manager, Agency Program Review, OPM, provided updates on human capital management initiatives.

### ***January 2012***

Rob Shriver, Deputy General Counsel, OPM, provided a briefing on the Pathways Programs Data Request. Julie Brill, Group Manager, Training and Executive Development, OPM, and Randy Bergquist, Chair, Chief Learning Officers (CLO) Council, presented on cross-agency collaboration and various training initiatives. Working group members provided updates on the various active working groups, including: Performance Management, Closing Skill Gaps, Disability Hiring, Hiring Excellence, and Diversity & Inclusion. Finally, Ramya Punnoose, Management Analyst, OPM, provided an Adobe Connect demonstration in support of the CHCO Academy strategic planning discussion.

### ***March 2012***

Kathryn Medina, Executive Director, CHCO Council, provided an update on progress of the various working groups, including: HR University, Retirement, GEAR, Skill Gaps, and Hiring Excellence. Pam Malam, Deputy CHCO, Department of Interior; Martin Pursley, Program Manager, Department of Interior; Vander Cherry, Project SEARCH participant, Department of Education; and Veronica Villalobos, Director, Office of Diversity and Inclusion, OPM; discussed Project SEARCH, a High School transition program focused on workplace immersion. Sydney Smith-Heimbrock, Deputy Associate Director, Employee Services, OPM, provided an update on various Governmentwide initiatives, including: Workforce Restructuring, Skill Gaps, HRStat, and Human Capital Assessment and Accountability Framework (HCAAF) Revitalization. Finally, the Deputy Council debated various surveys being administered to the Federal workforce and voiced their collective concerns over survey fatigue in the workforce.

### ***May 2012***

Duane Williams, Program Manager, Feds Feed Families, provided an update on the 2012 campaign and Sydney Smith-Heimbrock, Deputy Associate Director, Employee Services, OPM, provided an update on veteran's hiring. Kathryn Medina, Executive Director, CHCO Council, briefed on the CHCO Academy summer sessions, noting that the April Academy session on Merit System Principles and Prohibited Practices was a huge success with over 210 participants. During the open topics session, Judy Sunley, Deputy CHCO, National Science Foundation, presented on their progress with HRStat.





### ***July 2012***

Gerald Talbot, Director, NSPD Integration, OPM, discussed the National Security Professional and Emergency Management Charter. Randy Bergquist, Chair, CLO Council, and Julie Brill, Group Manager, Training and Executive Development, OPM, presented on the Supervisory Development Framework. Judith Rutkin, Manager, Agency Program Review, OPM, presented on the Closing Skill Gaps High-Risk Initiative, which includes OPM's long-term strategy, the competency assessment survey, and training. Governmentwide and agency-specific retirement error reports were shared with the Council members. Quay Crowner, Deputy CHCO, Department of Education, briefed the Deputy Council on the Public Service Loan Forgiveness Program.

### ***September 2012***

In lieu of the Deputy Council Meeting in September, the CHCO Council held the Fall Forum, which took place on September 20, 2012. Please refer to the Fall Forum section, which begins on page 13, for detailed information.

### **CHCO Academy Sessions**

The CHCO Academy sessions were reinvigorated in 2012. The Council started the year by revisiting the purpose of these sessions and asked each member to provide ideas on how to improve their efficacy and outreach. As most agencies face shrinking training budgets the Academy sessions filled a necessary niche by providing top quality training to a large number of Federal staff. Topics in 2012 covered a wide range of specialty areas including labor/management relations, merit staffing principles, project management and retirement operations. The 2012 Academy series trained over 1,200 Federal HR staff and continues to serve as a key resource to Council members who send staff to sessions at no cost to their agencies. Evaluation data collected and analyzed after each Academy session showed a significant increase in participant satisfaction and provided additional training ideas for 2013 and beyond.

### ***December 8, 2011***

#### **Performance Management**

This session focused on sharing the Goals-Engagement-Accountability-Results (GEAR) Model and its design for improving performance management. Justin Johnson, Deputy Chief of Staff, OPM, and Michael Kane, CHCO, Department of Energy, presented the GEAR Model to a diverse group of agency human resources representatives. The presentation was followed by a panel discussion with Justin Johnson, Michael Kane, and Jessica Klement, Director of Government and Public Affairs, Federal Managers Association.



*April 12, 2012*

**Merit System Principles and Prohibited Practices**

This Academy session provided participants with an in-depth look at the history of the Merit System Principles (MSP) and discussed the relationship between MSP and Prohibited Personnel Practices (PPP). The session reviewed specific case law examples highlighting MSP and PPP and involved the group in a series of interactive exercises involving five case studies to generate discussion. The presenter was Jason Thomas, Human Resource Specialist, Office of Employee Accountability, Partnership and Labor Relations, OPM. There were over 300 participants and feedback was overwhelmingly positive, with 95% of attendees indicating that they agreed or strongly agreed that the course was well designed and met their expectations.

*June 21, 2012*

**Project Management Fundamentals**

This session provided project management training for strategically-ranked professionals (GS 12-14) within the CHCO community. The session outlined a new perspective for developing strategies to more effectively implement human capital initiatives on both the macro and micro levels. It also presented an overview of project management concepts and techniques that when institutionalized, will promote an environment of growth for organizational programs and projects. The one-day session provided training to 52 senior human capital staff members.

*July 13, 2012*

**HR Strategies for a Multigenerational Workforce**

This session identified different generations of employees in the Federal workforce and explored various strategies for working with each generation. The forum consisted of a three-person panel, including Jeffrey Vargas, Chief Learning Officer, Commodity Futures Trading Commission (CFTC); Nora Gardner, HR consultant; and Dave Uejio, Lead for Talent Acquisition, Consumer Financial Protection Bureau. There were a total of over 200 attendees that participated in this session.

*August 16-17, 2012*

**Strategic Human Resources: Delivering Business Results**

This two-day session was designed to help participants conceptualize and apply the essential components of HR and organizational strategies and learn how to align the two. Through the use of case studies and class exercises, participants learned to leverage and create a wholly aligned human resource strategy and implementation plan for their organization. There were a total of 50 participants with 94% of respondents to the post-session survey agreeing or strongly agreeing that the academy session was helpful in their individual professional development.



*September 12, 2012*

### **Building a Healthy Retirement Case File**

This session outlined and discussed the purpose of the Benefits Administration Letter (BAL), which is designed to provide guidance on submitting “healthy” retirement application packages to OPM for adjudication. A “healthy” retirement package is defined as a complete and accurate package that does not have to be developed for missing, inaccurate or discrepant information. In this Academy session, the instructors described, form by form, what information OPM is looking for to enable Agencies to submit complete and accurate packages, thus reducing error rates and processing delays. Participants reviewed the checklist used to screen retirement cases to determine if the case is “healthy” and ready for adjudication. OPM described the process for auditing retirement packages for accuracy and completeness. The instructors included Raymond J. Kirk, Manager, Retirement Services, OPM, and Philip Gardner, HR Specialist, Retirement Benefits, OPM. There were a total of 600 participants, including both in-person attendees and webcast viewers.

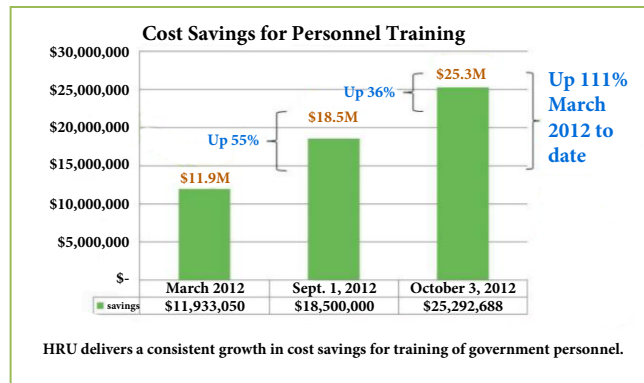
### **CHCO Council Work Groups**

As adopted in the Organizational Plan, working groups were unanimously supported as a replacement to the former subcommittee structure. In the first year, the Council has proven that by clearly stating objectives, deliverables, and timeframes, and by identifying a group leader who will be accountable for results, working groups can deliver high quality results and avoid the pitfalls of long-standing subcommittees. Below are the working groups and their outcomes for FY 2012.



## HR University

Under the leadership of the CHCO Council, HR University (HRU), launched in the spring of 2010, has continued to grow and expand. The online learning portal ([www.hru.gov](http://www.hru.gov)) was created to address competency and skill gaps within the HR community while achieving Governmentwide savings through shared resources and economies of scale. As of the end of FY 2012, HRU offered 106 vetted courses, had over 16,000 Federal employee user accounts, and had a total estimated cost savings of \$25.3 million in training dollars. New features included: an updated Course Catalog to provide users with a Google-like search engine to find courses based on the specialty area, cost, method, and keywords; a star rating feature was also added, to allow users to see feedback from others who have already taken the course; finally, the new Manager’s Corner was built to provide guidance and training to all Federal Managers on a variety of topics ranging from performance management, employee engagement and conflict resolution.



In 2012, a collection of web-based performance management training courses was added to enhance communications and foster relationship building between supervisors and employees.

Finally, at the close of FY 2012, the CHCO Council voted to transition HRU to be maintained and operated by OPM, Employee Services starting in FY 2013.

## Strategic Human Capital Management High Risk Initiative (SHCM-HRI)

The purpose of this working group is to develop and institutionalize a comprehensive strategic human capital management (SHCM) plan to reduce high risk skill gaps in targeted Federal-wide and agency-specific mission critical occupations. Critical skill gaps may be due to staffing shortages in particular occupations or lack of required competencies.

In 2010, GAO emphasized the importance of a Governmentwide focus on closing skill gaps as part of a comprehensive human capital management strategy. GAO suggested agencies work with OPM through the CHCO Council. The vehicle for this collaboration is the CHCO Council Skill Gaps Work Group.

This initiative began in September of 2011 at which time a project framework was developed including a comprehensive project plan. The CHCO Council work group was engaged for 18



months through March 2013 to meet established targets and have an institutionalized Governmentwide process to identify, measure, and close mission critical skill gaps.

## Retirement

In January 2012, John Berry, Director, OPM, released OPM's Strategic Plan for Retirement Services which outlined the Agency's goals to eliminate the current case backlog. One of the goals specifically mentioned partnering with the CHCO Council to improve the accuracy and completeness of incoming claims and making agencies aware of what constitutes a "healthy" retirement package, provide more frequent feedback to agencies on claims deficiencies, and improve communication flow between Agency, OPM and Payroll Providers in order to improve services to annuitants.



On January 27, 2012, at the request of Director Berry, the CHCO Council released a call for working group members to all CHCO Agencies. The work group, led by Kathryn Medina, Executive Director, CHCO Council, and Paige Hinkle-Bowles, CHCO, Department of Defense, requested participation from CHCO agencies interested in addressing both the short and long term goals associated with retirement operations improvement. The response to the request was overwhelming. The work group included 63 members, representing 19 CHCO Agencies and all five major Payroll Providers. In March 2012, working group members visited the Retirement Operations Center, in Boyers, PA, to tour, walk through the process, and discuss ways to streamline and improve packages sent by Agencies to OPM in order to reduce the number of errors and delays that were impeding progress. The two-day meeting created a solid foundation for the working group and established a clear working relationship among the three key stakeholder groups: Agencies, OPM, and Payroll Providers.

The group divided into three subgroups: Automation, Process Improvement, and Policy/Training. The group also established an Electronic Document Management System (EDMS) pilot, which is allowing six agencies the opportunity to access OPM's Electronic Document Management System (EDMS) to locate retirement files for their annuitants to see what documentation may be missing.

The Retirement Work Group developed and/or implemented the following initiatives, which, when combined, form the foundation for a better understanding of, and an improved retirement



application process, contributing to reduction of the current backlog of retirement cases, as well as insight for longer term improvements to increase efficiencies and accelerate customer service.

Specific Work Group accomplishments include:

- Increased agency knowledge of retirement process including focus on errors that have the biggest negative impact on processing cases
- Increased Agency access to the OPM Electronic Document Management System (EDMS)
- Expansion /completion of the Guide to Retirement Data Reporting (GRDR)
- Increased collaboration between Payroll Providers and Agencies
- Agency process improvements specifically related to the development and implementation of Benefits Administration Letters permitting photocopies of signed documents and outlining requirements for “healthy” case package assembly

As a result of the CHCO Council’s efforts, all agency benefits offices and payroll providers are aware of the need for complete and accurate retirement case submissions. Retirement Services and CHCOs remarked about the improved level of responsiveness from agency benefits personnel. Combined with improved processes and new staff, OPM is ahead of schedule in eliminating its pending case backlog so that 90% of new claims for annuity payments may be processed within 60 days by July, 2013. As of September 2012, annuitants are receiving an interim payment within 5 to 7 days of file submission to OPM that averages more than 80 percent of the final annuity. Annuities are generally finalized within five months. The inventory of pending claims, which stood at 61,108 at the end of January 2012, had been reduced substantially to 26,402 by December 2012.

## **The CHCO Council Fall Forum**

The Fall Forum is an annual event that enables the Council to focus on strategic planning and goal-setting for the next fiscal year. All CHCOs and their Deputies attend this meeting, which features presentations from the OPM Director, OPM senior leaders, and other government and industry professionals. Through roundtable discussions, presentations, breakout groups, and training sessions, CHCOs execute their mission to work on solutions to the most critical human capital issues facing the Federal Government.

The Fourth Annual Fall Forum was held on September 20, 2012 at the Department of Transportation Conference Center in Washington, DC. The one-day event allowed the Council





to exchange information in a confidential, focused setting that allowed for a high level exchange of ideas, information, and best practices.

The day began with opening remarks from John Porcari, Deputy Secretary, Department of Transportation, and Kathryn Medina, Executive Director, CHCO Council. John Berry, Director, OPM, announced the official final 2012 Feds Feed Families Governmentwide food drive totals. The CHCO Council members then participated in a closed-door session with Director Berry, allowing for candid discussions on current and future challenges and solutions. Justin Johnson, Deputy Chief of Staff, OPM, and Sydney Smith-Heimbrock, Deputy Associate Director, Employee Services, OPM, discussed developments and status of Retirement Processing, Telework, and HRStat.

The group discussed a variety of CHCO Council business including draft MOUs for the transition of HRU to OPM, CHCO Council metrics, and working group updates on Retirement and Disability Hiring. Veronica Villalobos, Director of Diversity and Inclusion, OPM, and Steve Shih, Deputy Associate Director for Executive Resources and Employee Development, OPM, discussed recent developments related to Diversity & Inclusion and SES Reform, respectively.

In the afternoon, John Palguta, Vice President, Partnership for Public Service, moderated a panel discussion on the Human Resources Line of Business (HRLOB) Revitalization Initiative, engaging the CHCOs in a discussion on the future of HRLOB and HR shared services. The panelists included Denise Carter, CHCO, Health and Human Services; E.J. Ned Holland, Jr., Assistant Secretary for Administration, Health and Human Services; Bernhard Kluger, Deputy Performance Improvement Officer, OPM; Shelley Metzenbaum, Associate Director for Performance and Personnel Management, OMB; William Milton, Jr., CHCO, U.S. Department of Agriculture; Lisa Schlosser, Deputy Chief Information Officer, OMB.

Finally, the day concluded with a session called “What We’re Doing Well.” In these sessions, Health and Human Services and the Office of the Director of National Intelligence presented on best practices that their agencies have successfully implemented that could be implemented by the other agencies.

## **Other Council Activities**

In addition to the working groups chaired by the CHCO Council and its members, the Council is engaged in many other activities led by other agencies, including OPM. These ad-hoc activities demonstrate the flexibility and responsiveness of the Council, and allow for richer collaboration

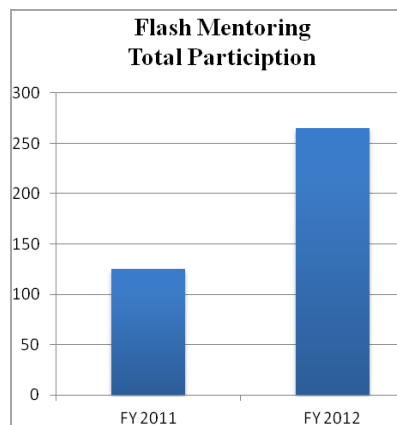




and delivery of Governmentwide resources on an as-needed basis. The Council participated in the following additional activities during FY 2012.

## Flash Mentoring

Flash Mentoring events have become a valuable training and networking tool for Federal HR staff especially during these times of budget constraints and limited training and development funds. They are professional developmental opportunities for HR professionals across the Government who want to gain valuable management and career development advice from experts in the field. Mentors share lessons learned on a variety of topics. The following details the Flash Mentoring sessions hosted in FY 2012:



- On March 19, 2012, the U.S. Patent and Trademark Office (USPTO) hosted a session focusing on “Developing Your Strategic HR Competencies: Lessons from Top Federal HR Leaders.” The keynote speakers were Teresa Rea, Deputy Under Secretary, Department of Commerce, Intellectual Property and Deputy Director, USPTO; Gail Lovelace, Strategic Advisors to Government Executives (SAGE); and John Berry, Director, OPM. The mentees were made up of 125 HR professionals at the GS-14 and GS-15 levels.
- On June 7, 2012, the U.S. Department of Education hosted a session focusing on “Developing Growth Strategies, Learning New Skills.” The keynote speakers were Dr. Brenda Dann-Messier, Assistant Secretary for Vocational and Adult Education, and Quasette Crowner, Deputy Chief Human Capital Officer, Department of Education. The mentees were made up of 80 HR professionals at the GS-5 to GS-11 levels.
- On September 6, 2012, the U.S. Department of the Treasury hosted a session focusing on “21st Century HR Workforce Challenges.” The keynote speakers were Rosie Rios,



Treasurer of the United States, Department of the Treasury; and Nani Coloretti, Acting Assistant Secretary for Management, Department of the Treasury. The mentees were made up of 60 HR professionals at the GS 13 to GS-15 levels.

### Feds Feed Families 2012 Campaign

Food banks across the country continue to face severe shortages of food and non-perishable items, just as summer begins and children are left without school nutrition programs. Over the past four years, we have witnessed the remarkable generosity of our Federal workforce, collecting an astounding 15 million pounds of food and non-perishable items to support families in their communities.

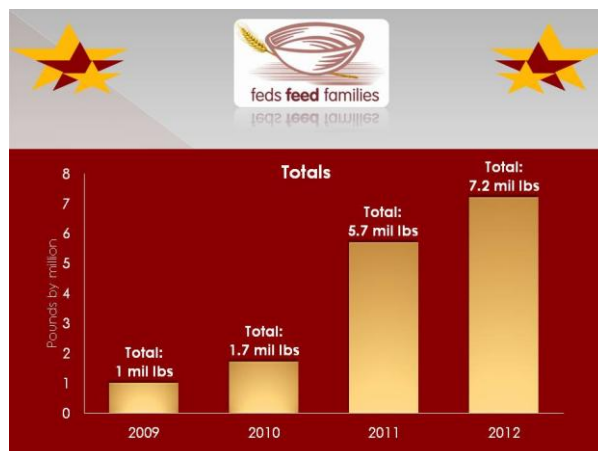


In 2011, the Federal workforce far exceeded the collection goal of 2 million pounds with a total of 5.7 million pounds collected. Because of that incredible success, the 2012 food drive did not establish a Governmentwide goal. The challenge given to the workforce was to "Beat Your Best," and, once again, they rose to the challenge, collecting a total of 7.2 million pounds!

Nearly 50 agencies in locations around the country participated. The Department of Agriculture was the agency that collected the most overall, with 2.7 million pounds of food and non-perishables donated to food banks across the country. The Department of Defense collected 2.1 million pounds of food which goes directly to the communities who need it the most.

The Council acknowledges that it is the generosity of each Federal employee that makes this possible and recognizes their support. The Hall of Fame is one way that individuals who make incredible contributions of 250 lbs or more are recognized. Over 600 individuals were recognized as Hall of Famers this year.

Feds Feed Families was led by the CHCO Council in partnership with OPM, the Department of Defense, and Department of Agriculture.







## Appendix A

### Members of the 2012 Chief Human Capital Officers Council

**John Berry, Chairman**

Director  
Office of Personnel Management

**Jeffrey Zients, Co-Chairman**

Deputy Director for Management &  
Chief Performance Officer  
Office of Management and Budget

**William Milton, Jr.**

Chief Human Capital Officer  
Department of Agriculture  
**Deputy: Karlease Kelly**

**Scott Quehl**

Chief Human Capital Officer  
Department of Commerce  
**Deputy: Bill Fleming**

**Paige Hinkle-Bowles**

Chief Human Capital Officer  
Department of Defense  
**Deputy: Donna Seymour**

**Vacant**

Chief Human Capital Officer  
Department of Education  
**Deputy: Quasette Crowner**

**Vacant**

Chief Human Capital Officer  
Department of Energy  
**Deputy: Sarah Bonilla**

**Denise Carter**

Chief Human Capital Officer  
Department of Health and Human Services  
**Deputy: Maria Price Detherage**

**Catherine Emerson**

Chief Human Capital Officer  
Department of Homeland Security  
**Deputy: Vicki Brooks**

**Karen Newton Cole**

Acting Chief Human Capital Officer  
Department of Housing and Urban Development  
**Deputy: Vacant**

**Rhea Suh**

Chief Human Capital Officer  
Department of Interior  
**Deputy: Pam Malam**

**Mari Barr Santangelo**

Chief Human Capital Officer  
Department of Justice  
**Deputy: Terence Cook**

**T. Michael Kerr**

Chief Human Capital Officer  
Department of Labor  
**Deputy: Sydney Rose**

**Linda Thomas-Greenfield**

Chief Human Capital Officer  
Department of State  
**Deputy: Linda Tagliatela**



**Brodi Fontenot**

Chief Human Capital Officer  
Department of Transportation  
**Deputy: Nancy Mowry**

**Anita Blair**

Chief Human Capital Officer  
Department of Treasury  
**Deputy: Nicole Johnson**

**John Sepulveda**

Chief Human Capital Officer  
Department of Veterans Affairs  
**Deputy: Tonya Deanes**

**Craig Hooks**

Chief Human Capital Officer  
Environmental Protection Agency  
**Deputy (Acting): Susan Kantrowitz**

**Anthony Costa**

Chief Human Capital Officer  
General Services Administration  
**Deputy: Kim Lewis & Toni Harris**

**Jeri Buchholz**

Chief Human Capital Officer  
National Aeronautics and Space Administration  
**Deputy (Acting): Sherri McGee**

**Eugene Hubbard**

Chief Human Capital Officer  
National Science Foundation  
**Deputy: Judy Sunley**

**Miriam Cohen**

Chief Human Capital Officer  
Nuclear Regulatory Commission  
**Deputy: Glenn Tracy**

**Lauren Wright**

Chief Human Capital Officer  
Office of Management and Budget  
**Deputy: Jamesa Moone**

**Angela Bailey**

Chief Human Capital Officer  
Office of Personnel Management  
**Deputy: Mark Reinhold**

**Deborah Kircher**

Chief Human Capital Officer  
Office of the Director of National Intelligence  
**Deputy: Daniel Scott**

**Raymond Limon**

Chief Human Capital Officer  
Small Agency Council  
**Deputy: Bonita Tingley**

**Kevin Mahoney**

Chief Human Capital Officer  
Small Business Administration  
**Deputy: Donald Sanders**

**Reginald Wells**

Chief Human Capital Officer  
Social Security Administration  
**Deputy: Donna Siegel**

**Deborah Kennedy-Iraheta**

Chief Human Capital Officer  
U.S. Agency for International Development  
**Deputy: Sandra Wiggins**

**Kathryn Medina**

Executive Director  
Chief Human Capital Officers Council



## **Appendix B**

### **Charter United States Government Chief Human Capital Officers Council**

*Adopted:  
June 11, 2003  
The White House*

#### **Introduction**

In his Management Agenda, the President has stated that the Federal government's workforce is one of its most valuable assets. Our employees are a national resource, and the American public expects the Federal workforce to be managed effectively and efficiently on their behalf. The Congress, through law, also supports this goal and has required that agencies establish a system of human capital management with plans that are strategically developed, leadership that has authority and accountability, and performance that is measured and continuously improved.

Chief Human Capital Officers (CHCOs) are essential to the success of human capital management throughout the Federal government. They are vested with stewardship responsibilities for Federal employees and agencies and also share a collective accountability with OPM for improving the strategic management of human capital throughout the executive branch. They exercise that accountability in part through the CHCO Council, as strategic partners with the Office of Personnel Management (OPM) and the Office of Management and Budget (OMB).

#### **Authority**

The CHCO Council (Council) was formally established by the Chief Human Capital Officers Act of 2002 (Act), which was enacted as part of the Homeland Security Act, Public Law 107-296, on November 25, 2002. The provisions are effective May 24, 2003.



## Purposes

The purposes of the Council are to:

- Advise OPM, OMB, and agency leaders on human capital strategies and policies, as well as on the assessment of human capital management in Federal agencies.
- Inform and coordinate the activities of its member agencies on such matters as modernization of human resources systems, improved quality of human resources information, and legislation affecting human resources management operations and organizations.
- Assist member CHCOs and other officials with similar responsibilities in fulfilling their individual responsibilities to:
  - (1) Implement the laws governing the Federal civil service, as well as the rules and regulations of the President, OPM, and other agencies with regulatory authority that affects Federal employees;
  - (2) In accordance with those laws and regulations, advise and assist agency heads and other senior officials in carrying out their responsibilities for selecting, developing, training, and managing a high-quality, productive workforce in accordance with Merit System Principles;
  - (3) Assess workforce characteristics and future needs and align the agency's human resources policies and programs with the agency's mission, strategic goals, and performance objectives;
  - (4) Advocate and assure a culture of continuous learning and high performance, developing and implementing effective strategies to attract, develop, manage, and retain employees with superior abilities;
  - (5) Identify human capital best practices and benchmarks, and apply those exemplars to their agencies and the Federal government as a whole.
- Provide leadership in identifying and addressing the needs of the Federal government's human capital community, including training and development.





## Membership

The Act establishes as permanent members of the Council:

- (1) the Director of OPM;
- (2) the Deputy Director for Management of OMB; and
- (3) the Chief Human Capital Officers of executive departments.

The Act also provides that the Director of OPM may designate other members of the Council. Such additional members may include, but are not limited to:

- (1) the Chief Human Capital Officers of other Executive agencies; and
- (2) members who are designated on an *ex officio* basis and who may be invited to contribute to projects as particular skills and expertise are needed.

The Act provides that the Director of OPM serves as Chairperson of the Council, and the Deputy Director for Management of OMB serves as Vice Chairperson.

## Other Attendees

As required by the Act, at least once a year, representatives of employee labor organizations will be invited to attend a Council meeting. At the discretion of the Chair, representatives of other organizations may be invited to attend Council meetings.

## Meetings

Meetings will be scheduled at the direction of the Chair. Attendance will generally be limited to principals and members, as described above, and to others who are specifically invited or approved by the Chair.

When votes are taken, each Council member (other than *ex officio* members) will have one vote. Members must be present to vote.

Invited guests who are not Federal employees may express their views, but will not participate in deliberations or decisions on policy matters, unless the meeting has been opened to the public in accordance with the Federal Advisory Committee Act (FACA). Note in this regard that FACA does not normally apply to Council meetings.

Minutes of meetings will be prepared by the Secretary/Treasurer, and copies will be provided to all members. The Secretary/Treasurer will maintain an official archive of all minutes and other official Council documents.



## **Committees**

The Chair may establish standing committees of the Council and appoint committee chairs and members. The Chair may also establish one or more *ad hoc* committees to deal with specific issues or initiatives.

## **Annual Report**

The Act requires that the Council submit each year to Congress a report on the activities of the Council.



## Appendix C

### CHCO Council Strategic Goals 2010

The Council's strategic goals reflect the Council's mission and charter as well as OPM's priorities. They demonstrate the Council's strong partnership with OPM in the implementation of top human capital initiatives, broadly and specifically with regard to veterans, hiring reform, labor-management relations, and diversity and inclusion. The Council, including its working groups, forums, academy sessions and other activities, will focus on the strategic goals below. These goals will be reviewed on an annual basis to ensure they are met and reflect the needs of the Federal human capital community.

**Goal I:** The Council supports OPM's strategic goals of recruiting, retaining, and honoring the best workforce for the American people, by playing a critical role in the implementation of Veterans Employment, Hiring Reform, Labor-Management Relations, and Diversity and Inclusion.

**Goal II:** The Council supports and sponsors continuing development and implementation of government-wide HR tools to improve the selection, assessment, and development of the Federal HR profession.

**Goal III:** The Council leads and encourages dialogue on critical and emerging Federal human resources issues, and will create a structured framework for raising and discussing issues, as well as developing and implementing measurable solutions.





## Appendix D

### CHCO Council Organizational Plan 2010

#### Council Governance and Structure

##### Member Accountability and Structure

Members agree that all designated CHCOs should be engaged in the Council, and that regular attendance at Council meetings is expected. In situations where the CHCO has a wide range of Agency responsibilities beyond human resources and may not be available for monthly meetings, that agency's Deputy CHCO must be fully engaged and fully authorized to represent the CHCO and the agency's views. Ultimately, the success of the Council relies heavily upon member engagement.

The Council hereby adopts the following procedures to improve member accountability and engagement:

##### Accountability

- A Welcome Memorandum from the Chair will be created and distributed to new CHCO members, outlining expectations and membership guidelines for each member of the Council;
- Attendance will be required at meetings by at least one representative from each CHCO agency who is fully authorized to represent the agency's position (named or acting CHCO or Deputy CHCO);
- Deputy CHCOs sitting for a CHCO must have full proxy voting rights and authority from the CHCO to participate and vote during Full Council meetings;
- Any other Agency representatives who attend on behalf of CHCOs will not be recognized as voting members, but may RSVP to attend as a guest;
- Executive Director will work with Chair, members, and agency leadership to discuss any particular agency attendance or engagement problems and will contact the agency CHCOs individually to address/discuss.

##### Engagement

- Meeting agendas will be crafted to maximize the synergy of the Council members' interaction, and will facilitate strategic discussion by:



- Limiting (or eliminating) program presentations at council meetings – and using other venues for this type of information (bulletin, website, e-mail, Deputy CHCO Meetings),
- Focusing meetings on no more than two agenda topics, which are thought-provoking and action-oriented discussion items,
- Ensuring meetings have a clear objective around the topics (briefing for a vote or recommendation, determining the need for a working group, or a close-out working group report, etc.). Presenters must clarify objective at the outset by pre-briefing the Executive Director,
- Encouraging CHCO and Deputy input on strategic issues for agenda items.

### **Other Council Meeting Attendees**

Due to the nature of the Council meetings, the agenda topics, and limited seating capacity, the monthly full Council meetings will be open to CHCOs, Deputies, OPM senior staff, and invited guests who have RSVP'd through the Executive Director. The Council reserves the right to restrict attendance at any meeting. This applies to all but one Public/Open meeting required by law each year, to be announced when scheduled.

### **Organizational Structure**

The Council votes unanimously to dissolve the existing subcommittees and adopt the working group structure for group projects going forward.

The following are supporting reasons for this decision:

- Working Groups are focused on a clear objective;
- Working Groups bring together the best possible resources for a given project at a given time;
- A Working Group is more fluid and responsive to changing parameters;
- Working Groups are able to maximize participation and accountability because the commitment is clear and finite with respect to the time and resource requirements from participants.

The following actions will be taken with respect to the subcommittees:

- Each subcommittee, through its Chair, will provide a Current Status Report and Recommendations to aid the transition or dissolution;
- Executive Director will oversee the disbanding of subcommittees to ensure there will be no adverse effect on any existing projects;



- Where necessary, and supported by the Council (see below), new Working Groups will be created to continue a project or work in progress;
- Following this outline, all subcommittees will be dissolved by the end of calendar year 2010;
- The Executive Committee, as a subset of the subcommittees, is immediately dissolved.

**The following protocol is hereby adopted with respect to Council Working Groups:**

- Working groups can be created through a motion from the floor of the Full Council, or other means, but must have broad Council support, and must have final approval of the Chair to form;
- Working groups must follow ground rules for clearly outlining Objectives, Timeline and Deliverables through the use of the adopted “Call for Working Group” template;
- Working group must identify a leader (Chair) who takes responsibility for outlining above, and keeping WG focused on the agreed-upon Objectives, Timeline and Deliverables. The Chair is also responsible for reporting requirements;
- Working groups will be comprised of Council members (CHCOs, Deputy CHCOs or their designees, as outlined in the participant requirements). Other members with particular expertise may be added at the discretion of the Executive Director;
- Working Group Chair will keep Executive Director apprised of status, and will preview its summary/report with Executive Director before presenting reports or updates to Full Council;
- Upon completion of deliverables and objectives, each working group will give a final report out to the Full Council, and will be dissolved;
- The Executive Director will manage and oversee the organization, objectives, membership and activities of every Council working group to ensure it complies with Council guidelines.

**Rules of Engagement**

The Chief Human Capital Officers Council Mission Statement is as follows:

*The Chief Human Capital Officers Council supports the U.S. Office of Personnel Management in leading Federal agencies in the strategic management of human capital, providing a forum for senior management officials to exchange human resources best practices, and informing the dialogue on civil service reform in order to build and maintain an outstanding Federal workforce for the Nation.*

The Council recognizes the importance of communication and protocol between the Council and OPM, and hereby adopts the following protocol changes:



## **Project Collaboration**

The Council and OPM should determine the type of relationship a particular project will require at the outset of any project to clarify intended outcomes for both parties. The relationship will differ based on the goals that are being addressed by a particular project and what will be expected of both OPM and the Council during the life cycle of a project.

### **Working relationships should be clearly defined by:**

- Determining and assigning Roles at the outset of any joint project, including:
  - What is the background? (OPM initiative, Executive Order, Presidential memo, etc.)
  - Who is the lead? (Council or OPM)
  - In what capacity is the Council needed (examples):
    - As an expert consulting or advisory body,
    - As a partner in developing and/or advising programs,
    - As a screening body, or
    - As an Implementation Partner
- Creating and using written templates to outline projects and logistics, including:
  - Clearly identifying the intended outcome(s)/objective(s)/deliverable(s)
  - Identifying and aligning necessary resources,
  - Requesting targeted participants (targeted based on above),
  - Outlining Barriers, challenges, timelines and deliverables
- Use *Call for Working Group* as a template where practicable to implement this protocol.

## **Advisory Committee**

In an effort to facilitate efficient communications between the Council and all other stakeholders, an Advisory Committee will be created. The main purpose of the committee is to enable the Council to respond quickly to requests, mobilizing resources to facilitate Council projects and partnerships outside the Council where Full Council engagement is not necessary, or is impractical. The committee will also serve as a pipeline for agency issues that develop into Council issues due to commonality or scope. The Advisory Committee is a tool to enhance communications, *and shall in no way act as a substitute for agency involvement or inclusion in Council communications or decision-making.*

### **The structure and purpose of the Advisory Committee will be as follows:**





- A small number of CHCOs and Deputy CHCOs will be selected by the Chair to take on the additional responsibility for responding to time sensitive advisory requests;
- The Council will establish a protocol for ensuring full and timely communication (updates/summaries/status reports) to the Full Council of the Advisory groups' activities;
- The group will also review and filter issues rising from the agency level that have commonality among Council members, and which require elevation to a discussion/agenda item, or other council-wide action;
- This group will work closely with the Executive Director as liaisons with other Councils and stakeholders.

#### **Examples of advisory committee activities:**

- An agency is experiencing an issue that they believe is a shared concern among agencies, they notify the Advisory Committee of their issue and ask them to advise; the committee may:
  - Have advice to offer the Agency based on shared experiences or best practices;
  - Decide this is a broad concern and should be raised at the next Council meeting;
  - Ask the Executive Director to consult with OPM for guidance.
- The CHCO Council receives a request from OPM or other organization to attend an information session on an HR related topic, but the invitation comes with only 24 hours notice, the Executive Director may contact the Advisory Committee **as well as** other Council members, in the hopes of getting Council participation on short notice.
- A Council working group may be drafting a report for the full Council to vote on, but may want a 'fresh eyes' review before presenting to the Full Council; the working group may choose to preview the report with the Advisory committee as a sample group.
- The Executive Director may have an agenda topic or other issue she wants to run by the Council, and may solicit the advice of the Advisory Committee for expediency.





## Appendix E

### Working Group Membership for FY 2012

#### HR University

Working group ended in November 2011

Chair: Rita Franklin, Deputy CHCO, Department of Energy

Co-Chair: Kathryn Medina, Executive Director, CHCO Council, Office of Personnel Management

#### Working Group Members

Johnny McLean	Department of Defense
Serena McIlwain	Department of Energy
Teresa Gurnard	Department of Homeland Security
George Tanner	Department of Homeland Security
Melissa DuRoss	Department of Justice
Ellen Shay	Department of Justice
Kim Green	Department of Labor
Dawn Phillips	Department of Treasury
Tarik Pierce	Department of Veterans Affairs
Samia Wiley	Department of Veterans Affairs
Larvone Lewis	General Services Administration
Stephanie Diamond	National Aeronautics and Space Administration
Julie Brill	Office of Personnel Management
Linda Datcher	Office of Personnel Management
Karen Kolakowski	Office of Personnel Management
Shanaz Mobley	Office of Personnel Management
Tara Ricci	Office of Personnel Management



## **Retirement Processing**

January – September 2012

Chair: Paige Hinkle-Bowles, CHCO, Department of Defense

Donna Seymour, Deputy CHCO, Department of Defense

Co-Chair: Kathryn Medina, Executive Director, CHCO Council, Office of Personnel Management

## **Working Group Members**

Deborah Carlton	Department of Defense
Paula Shipe	Department of Defense
Daphne Williams	Department of Defense
LaJuan Darby	Department of Education
Lynette Johnson	Department of Energy
Cindy Stewart	Department of Homeland Security
Douglas Alexander	Department of Labor
Ann Lindsay	Department of Labor
Gary Lunt	Department of Labor
Jacqueline Long	Department of State
Erin Doyle	Department of Veterans Affairs
Valerie Freeman	Department of Veterans Affairs
William Shull	Department of Veterans Affairs
Danielle Brown	General Services Administration
Vera Walker	General Services Administration
Jeremy Leon	Office of Management and Budget
Jon Horrell	Office of Personnel Management
Justin Johnson	Office of Personnel Management
Vic Basile	Office of Personnel Management
Matt Collier	Office of Personnel Management
Ken Zawodny	Office of Personnel Management
Chuck Grimes	Office of Personnel Management
Matthew Perry	Office of Personnel Management
Dave Bowen	Office of Personnel Management
Jonathan Foley	Office of Personnel Management
Raymond Kirk	Office of Personnel Management
Candace Butler	Office of Personnel Management
Traci DiMartini	Office of Personnel Management
Vanessa Proust	U.S. Agency for International Development



Cynthia A. Andrews	U.S. Agency for International Development
Annette Castro	U.S. Air Force
Linda Hundley	U.S. Air Force
Chuck Huerta	U.S. Air Force
Mike Richardson	U.S. Air Force
Maria Molly	U.S. Air Force
Joanne Groves	U.S. Air Force
Heidi Liebel	U.S. Air Force
Anita Elkins (Nikki)	U.S. Army
Jarad B. Garman	U.S. Army
Peggy Sholtz	U.S. Army
Hans Hart	U.S. Army
Gregory Buchanan	U.S. Army
Mary Foley	U.S. Navy
Suzy Szymanski	U.S. Navy
Carol Johnston	U.S. Navy
Albert Woods	U.S. Postal Service

### **Strategic Human Capital Management High Risk Initiative (SHCM-HRI)**

September 2011 – Present

Chair: Pat Tamburrino, CHCO, Department of Defense

Co-Chair: Mary Beth Lepore, Department of Defense

#### **Executive Steering Committee Members**

Joseph Kennedy	Office of Personnel Management
Kathryn Medina	Office of Personnel Management
William Milton	Department of Agriculture
William Fleming	Department of Commerce
Robert Buggs	Department of Education
Pamela Malam	Department of Interior
Gene Sexton	Department of Labor
Brody Fotenot	Department of Transportation
Tonya Deanes	Department of Veterans Affairs
Lenora Gant	Office of the Director of National Intelligence
Jamesa Moone	Office of Management and Budget
Sandra Wiggins	U.S. Agency for International Development



### **Working Group Members**

Allen Hatcher	Department of Agriculture
Fred Lang	Department of Commerce
Sandra Wells	Department of Interior
Kim Green	Department of Labor
Laveen Thompson	Department of Labor
Yoneko Riley-Barrow	Department of Transportation
Shanda Adams	Department of Treasury
Johnathan Gardner	Department of Veterans Affairs
Joy Jones-Haskins	General Services Administration
Jane Datta	National Aeronautics and Space Administration
Christopher McLaren	Office of Management and Budget
Jason Barke	Office of Personnel Management
Jeanne Friedrich	Office of Personnel Management
Maureen Higgins	Office of Personnel Management
Shanaz Porter	Office of Personnel Management
Judith Rutkin	Office of Personnel Management
Renee Singleton	Office of Personnel Management
Scott Mason	Social Security Administration
Marilee Shorter	U.S. Agency for International Development





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Office of Personnel Management  
Office of the Director  
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Washington, DC 20415