

FOIA MARKER

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"Operational Systems" Meeting 6/29/94

Stack:	Row:	Section:	Shelf:	Position:
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DAY: MONDAY 29
DATE: JUNE 05, 1994
TIME: ~~1:30pm - 2:30pm~~ 3:30pm - 4:45pm
LOCATION: 750 OFFICE BLDG
EVENT: OFFICE MTG
"OPERATIONAL SYSTEMS"

PHOTOCOPY
PRESERVATION

11AM - NOON

JUN
67

Schedule
mtg to AA/Adm
Sally Gove
to discuss

NOTE TO KRISTINE

After reviewing Claudia's report, I think most of her observations, comments, findings and recommendations are appropriate and pertinent. In my review and analysis, I deviate from some of her recommendations because I now believe some important changes in staff functions should be made to allow the office to run more efficiently and effectively. I am probably upsetting the apple cart, but I describe these changes in my comments below. They deal mainly with the paper flow, scheduling and administrative issues.

Some of my comments are candid, but honest, and may not be what you want to read. All of my comments are my own and should be considered "food for thought." My feelings will remain in tact if you choose to ignore any or all of them.

OPERATIONAL SYSTEMS

Office Systems and Procedures/Projects

- I think this is the area where Claudia had the greatest impact. We worked together as a team with the support staff to review, revise, and prepare several manuals (travel, policies and procedures, correspondence, call-referral directory and orientation) that were pertinent to the day-to-day operations of the office. These were presented to you during Claudia's exist interview and, to my knowledge, are being used within the office by the support staff. I reviewed the orientation manual again prior to my departure, added several items, and gave it to Sandy Massenburg. I also included several AIDS education pamphlets I got from Don Donaldson. I will talk with Sandy to make sure the changes were made.
- For the record, we were following appropriate PHS policies and procedures for travel, controlled correspondence, and time and attendance when Claudia arrived. We had a policies and procedures manual in place (it needed some revision); we did not have an orientation manual, a call-referral directory, or White House staff manual (not pertinent at the time).
- It's great to have these "systems" in place, but the juice isn't worth the squeeze if people don't use them. You can lead a horse to the trough, but you can't make it drink the water. And, for some unknown reason to me, I don't think the manuals will be utilized as they should be.

Comments/recommendations

- I am not going to comment specifically on each of the projects Claudia described in her report. As stated above, most of them were completed prior to her final departure. A few may need massaging, but they are basically being used.
- I recommend that Sally Jones and Sandy Massenburg be given the lead responsibility for maintaining and updating the manuals, and to ensure that they are not only accessible to the staff, but that staff are using them. If the manuals are put on the shelves to collect dust (which they often are), they don't serve any useful purpose, and the staff time spent keeping them current is wasted.
- Now that I have had the opportunity to work within the new structure and reflect on its strengths and weaknesses, there are several areas in this section of Claudia's report on which I would like to elaborate. A critical issue is that of paper flow.

Paper Flow

Executive Secretariat Function

- I **strongly recommend** that two FTE's be used to handle the paper flow within the office: (1) one for an Executive Secretariat (ES) (GS-13) and, (2) one for a Correspondence Assistant (CA) (GS-6/7). It also would be prudent to seek the assistance of a volunteer(s) through John's help to assist with this function. I **do not recommend** that this function continue to be a part of the scheduler/executive assistant's duties and responsibilities. ✓
- The ES function is critical to the office and should be separate from the administrative process. The ES person should be responsible for overseeing the paper flow for the office (White House as well as PHS). He/she should assume the role of the senior liaison within the office, the PHS/ES and the White House/ES.
- He/she should divide their time between the 750 office and the 738G office. The ES staff should be responsible for seeing that the mail at both locations is opened at specified times, date stamped, reviewed and sorted. All incoming correspondence (whether it needs action or its for FYI only) should be entered into the controlled correspondence tracking system before assignments are given and tracked. Subsequently, letters of invitation should go to the scheduler; media event requests should go to the communications officer; and, miscellaneous correspondence (FYI only)/publications, advertisements, etc., should be

triaged to the appropriate staff or trashed. Personal letters or notes would go directly to you for action. With some initiative and commitment, this approach could work efficiently and effectively.

- The ES staff should have the lead responsibility in drafting responses or reviewing and clearing documents. When appropriate, other staff could be used as resources. I believe there has been enough correspondence answered that it would not be difficult for the ES staff to adequately fulfill this function.
- The ES function should include oversight responsibility for the filing, archiving, and retrieval systems for the office. The staff should be required to work closely with the Information Management Specialist (IMS) to review, revise or upgrade, if necessary, the existing computer-based tracking and file retrieval system (CTFR). I am aware that the ONAP controlled correspondence form has been streamlined, but it needs some additional revisions.
- Although we developed a manual filing system, I strongly recommend that the IMS (Vesta Jones) be given the lead responsibility in reviewing the existing CTFR and comparing it with FDA's Star Master Database electronic and color-coded manual filing system to determine what revisions could be made with minimal funding to enhance our existing system. Vesta is familiar with FDA's system (Claudia described it in her report).
- I strongly believe that you should not review the mail and make assignments to individual staff members. It is a waste of your time. At the most, you should receive an FYI copy of all incoming correspondence. If you want to weigh in with comments, you can do so, give it to the ES staff and let them take the responsibility for incorporating your comments. You will have an opportunity to see the final response as you are signing the correspondence.
- I think you have been in the job long enough to have a pretty good understanding of what is coming in.
- Again, I can't stress enough how important this function is. At one point when I was in ONAP, there was an FTE for the ES position, but somewhere along the way, it disappeared. It should be revived.

Scheduler/Executive Assistant

- As I mentioned earlier, this individual should not be responsible for the paper flow at 750 (this is a change from what we had agreed to when Steve and I were in ONAP). Handling your letters of invitation and verbal invitations; scheduling your trips and meetings, maintaining your daily appointment calendar; preparing your meeting agendas and background/briefing materials; dealing with day-to-day sensitive issues; and providing you with personal support are critical functions of the position that should keep an individual extremely busy.
- He/she should be responsible for working closely with your Andrew, John and Retina in scheduling your appointments and travel. This individual should not be responsible for arranging or completing your travel plans and vouchers for your trips. Travel arrangements (from start to finish) should be the responsibility of the secretary.
- Claudia's report further describes the role of the scheduler/executive assistant in setting up routine scheduling meetings with cluster leaders and other appropriate staff. I concur with her recommendations and they should be discussed with whomever you get to replace Steve.

Administrative Officer/Program Management Specialist

- I recommend this function be separated from the ES function and concentrate only on the administrative process. Sally Jones and Sandy Massenburg should maintain the lead responsibility for: (1) supervising the support staff; (2) maintaining the commitment (budget) register; (3) processing and handling personnel requests/actions; (working with supervisory staff on position descriptions and EPMS's); (4) maintaining and up-dating office manuals (except the correspondence manuals); (5) training and orienting new staff on the functions of the office; (6) reviewing and processing requisitions; (7) overseeing time and attendance records; and, (8) maintaining the publications library; and (9) performing other appropriate administrative functions.

ORGANIZATIONAL SYSTEMS

- The first eight of Claudia's recommendations (page 17 of her report) are very important and should be taken seriously by you and the Deputy. I am aware the HHS Coordinating Committee on AIDS is convening its first meeting this week, and that ONAP is having a one-day staff retreat so several of the recommendations are being addressed.

- I am not sure about the eighth recommendation that deals with total quality management (TQM). As far as I know, the Department hasn't implemented TQM. Bob Moran has been very interested in TQM and would be an excellent resource to pursue this area if you believe it is worthwhile.
- If the ONAP organizational structure has not yet been approved by the Department/OMB, and published in the Federal Register, I would have serious concerns as to what message is being conveyed to me. If it has been approved, ignore this bullet.
- Why hasn't the Deputy been selected? Again, what message is being conveyed to you.
- I strongly believe it is critical to the success of the Office to develop and implement an internal strategic plan (also specific cluster group plans can be developed as deemed appropriate). Without clear direction and guidance, the staff will continue to flounder and be misguided.
- Staff roles and responsibilities remain unclear. I believe some of the staff are under utilized and there isn't much personal motivation to do otherwise. Staff that have been put on the "out placement" list have more than likely become "disengaged" and probably are not functioning to their fullest capacity.
- I don't know what the general consensus is now with respect to putting a hierarchical structure in place. If structure is what it takes to provide staff with clear direction and guidance, then give it to them. Coordination and collaboration among staff is lacking and needs to be addressed.
- I am confident the staff retreat is going to be interesting, revealing, controversial, enlightening, and I hope, rewarding. Be prepared to take some hard verbal punches. There is strong staff consensus that leadership and direction is lacking at the top.

COMMUNICATIONS STRATEGY

- I hope the facilitator for the staff retreat will address this issue. I can honestly say I became "burned out" trying to please staff when it came to the flow of information. No matter what system was put into place, it just didn't seem to make a difference. If you erred on the side of too much, they became overwhelmed; if you erred on the side of too little, they were uninformed.

- I believe the use of the e-mail (although it is overused) and access to the bulletin boards have resolved many of the communications problems.
- Wasn't John Gurrola suppose to work with Marty Davis (OASH) to develop a communications strategic plan? Has this been done? If not, I strongly recommend that it be done. I think John could benefit from working with staff who have the expertise and experience in dealing with the media.
- I think Claudia was mixing apples and oranges when she discussed position descriptions, work plans, and training plans for employees in this section. They are extremely important issues that warrant immediate attention. **EPMS's for the civil service staff must be in place and signed by June 4.**
- I know there has been a lot of criticism from the staff regarding training, but I don't know any solution with the current budget constraints.
- Team building and consensus is important, but neither will work if staff aren't willing to put forth the effort. Staff (past and present) have not been able to do this effectively and I don't fully understand the reason(s) why. I think the perception of lack of leadership and direction from the top may be a major contributing factor.
- With respect to internal meetings, I believe it is critical to build consensus and be inclusive rather than exclusive. This presents more of an opportunity to build teams and less of an opportunity to be open for criticism by being selective with whom you meet or communicate with.

INFORMATION SYSTEMS

- I don't have anything to add to Claudia's comments and recommendations under this section (page 21). Her observations are pertinent and I strongly suggest that her recommendations be implemented.
- A lot of ONAP money has been spent on computer technology and software packages that I don't believe are being fully utilized by staff (because they don't know how to use them and they haven't been adequately trained). Once Vesta and Art leave, most of the computer expertise will go with them. I don't fully understand what Ted's role is, but I assume he will have to work more closely with the staff.

General Comments (cryptic)

- An internal strategic plan is important.

- establish measurable goals and objectives for the office, by cluster groups, and by individuals.

Page 7

- Make staff accountable for work products. Valuable staff time has been wasted.
- I sincerely hope someone has put a lot of thought into who and how the HHS Coordinating Committee and the Presidential Advisory Council is going to be staffed. A lot of time and effort and money is going to have to be devoted to the latter if you want it to be successful. One staff person isn't the answer.
- Think about spending more time in the Office and less time on the road. There is a lot that needs to get done here in Washington and I think there is a credibility issue at stake.

I have to stop now, because I am getting into areas that are sensitive. Just know that I have a lot of respect for what you are trying to accomplish. You have a tough job and I know you are committed to making great accomplishments. You can do it, just keep focussed, establish some priorities, and listen to people who can give you good sound advice.

Let me know if I can be of any assistance to you. I have more thoughts in my head that I haven't put down on paper.