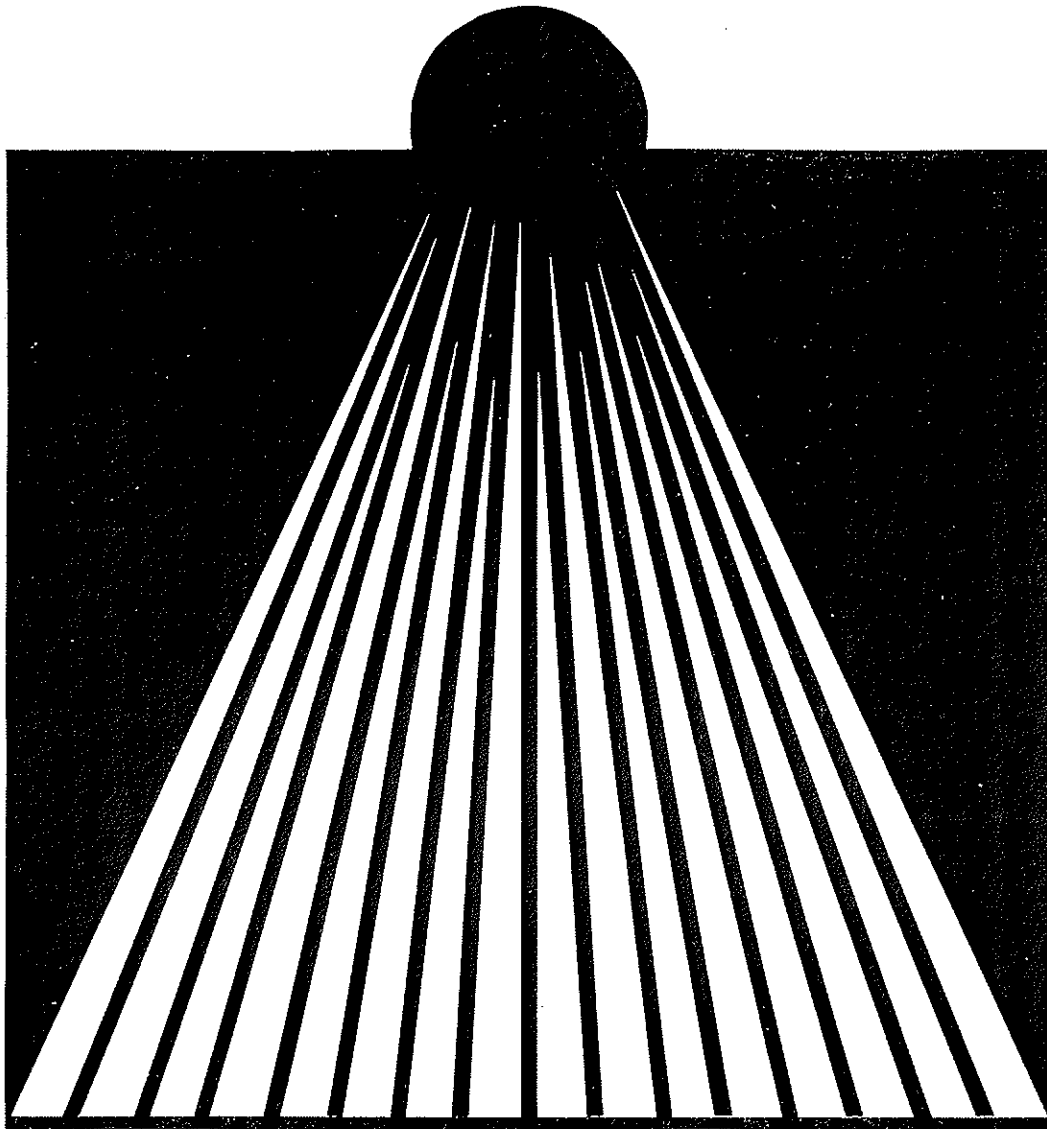


Proceedings of the  
13th Annual  
Management Consultation  
Consumer-owned Rural Electric  
System Management



Jekyll Island, Georgia  
May 12—14, 1970

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## STATEMENT OF VIEWPOINTS FOR CONSULTATION GROUP

- A. We believe that a modern management program is essential to the achievement of objectives in the consumer-owned rural electric system throughout the nation.
- B. We believe that the dynamic application of the principles of a modern management program will be enhanced where there has been a maximum effort to exchange ideas and experiences among consumer-owned member organizations.
- C. We believe that research of our management programs can be more effective and meaningful if performed on a group basis.
- D. We believe that modern management principles must be under constant study and review to develop these principles to the end that they will enable our organization to make the maximum contribution to the members, community, state, and the nation.
- E. We believe that the development of a program of modern management practices within all consumer-owned rural electric systems depends on the orderly transition from concepts to practical application.
- F. We believe that managerial standards should be established for consumer-owned rural electric systems that will move management toward a constantly improving professional status.
- G. We believe that we should share with all consumer-owned rural electric systems and other similar organizations management applications, experiences, and innovations.

## STATEMENT OF OBJECTIVES FOR CONSULTATION GROUP

- A. To review results of the application of principles, tools, and techniques of management and interpret them in terms of specific situations and needs.
- B. To provide opportunity to develop research projects and assign appropriate committees to conduct studies and make recommendations to the total group regarding improvement for participating consumer-owned systems.
- C. To develop management competence which will demonstrate values of modern management programs and make it possible for members to share experiences, devise new ideas and programs, and assist consumer rural electric systems to make an orderly transition from conceptual thinking to practical applications of management programs.
- D. To explore means for getting more acceptance of, and to stimulate interest in, modern management practices among other consumer-owned systems and help to broaden the interest in management improvement programs.
- E. To promote and encourage the widespread utilization of managerial standards, outside assistance, information and selection criteria for filling vacant managerial positions with qualified personnel.
- F. To provide the member-participants with an opportunity to broaden their viewpoints and develop convictions on the management process and the role consumer-owned rural electric systems should be playing within the communities in which they operate.
- G. To provide group leadership and guidance in overcoming management problems common to participating organizations.

## CRITERIA FOR MEMBERSHIP IN MANAGEMENT CONSULTATION

### I. Active Membership

Active membership shall be limited to consumer-owned rural electric systems.

Criteria:

- A. Member-systems shall have established a program for improving management based on the five functions of management which will include Planning, Organizing, Directing, Coordinating, and Controlling.
- B. Individual participation from member-systems shall be limited to the General Manager and not more than two employees responsible for the implementation of broad management programs within the system. These participants shall meet the following requirements:
  1. Shall have developed a basis of broad understanding and support of the principles of modern management and have demonstrated their ability to adapt conceptual thinking to successful general management, particularly as it relates to consumer-owned systems.
  2. Shall have knowledge of and be involved in organization planning including development of policy and position descriptions, wage and salary administration, performance appraisals, and the development and use of controls and control reporting.
  3. From time to time shall participate in research projects pertinent to the group objectives and record and present findings to the organization for its review and evaluation.

### II. Associate Membership

Associate memberships may be held by other consumer-owned enterprises. Participants in this group must meet the criteria set forth for active membership. Associate members shall be without vote.

### III. Memberships Contingent on Participation

- A. Active and Associate Members shall pay an annual membership dues of \$100.00 and agree to bear proportionate cost of the annual consultation meeting.
- B. Continuing membership in the organization will be contingent on the individual participant, as designated by the member-system, attending and taking part in the programs carried out by the organization as follows:
  1. Shall attend all meetings of consultation group unless absent with valid cause.
  2. Shall participate as requested in research projects which have been authorized by the organization.
  3. Shall appear on a consultation program as requested except with valid cause.
  4. Shall give constructive support to the purposes and programs of the organization.
  5. Must attend at least two annual consultation meetings during three consecutive years.

## F U N C T I O N S

CHAIRMAN: To act as general coordinator of the activities of the association and preside at all business meetings. To issue notice of all regular meetings of the membership or special meetings of the cabinet. (The cabinet to be composed of the Chairman, Vice-Chairman, Treasurer, and all committee chairmen). To represent the Association in relation to other organizations. Term of office to be three (3) years.

VICE CHAIRMAN AND CONFERENCE SECRETARY: To assume all duties of the Chairman in the absence of or inability of that officer. To keep a record of all proceedings and prepare, publish, and distribute the annual conference summary. (This function can be carried out with the assistance of the Management Services Department of NRECA, including stenographic help.) To request, collate, summarize, and distribute a critique of the annual conference. Term of office to be three (3) years.

TREASURER: To collect all monies due the Association including regular membership dues and special assessments. To pay all bills submitted in proper form. To prepare an annual financial statement and forward to the Secretary for inclusion in the annual conference summary. Term of office to be three (3) years.

## C O M M I T T E E S

All committees to be composed of a chairman and three (3) members. The Chairmen to be nominated by the nominating committee. All committee chairmen and committee members to serve staggered terms of three years each.

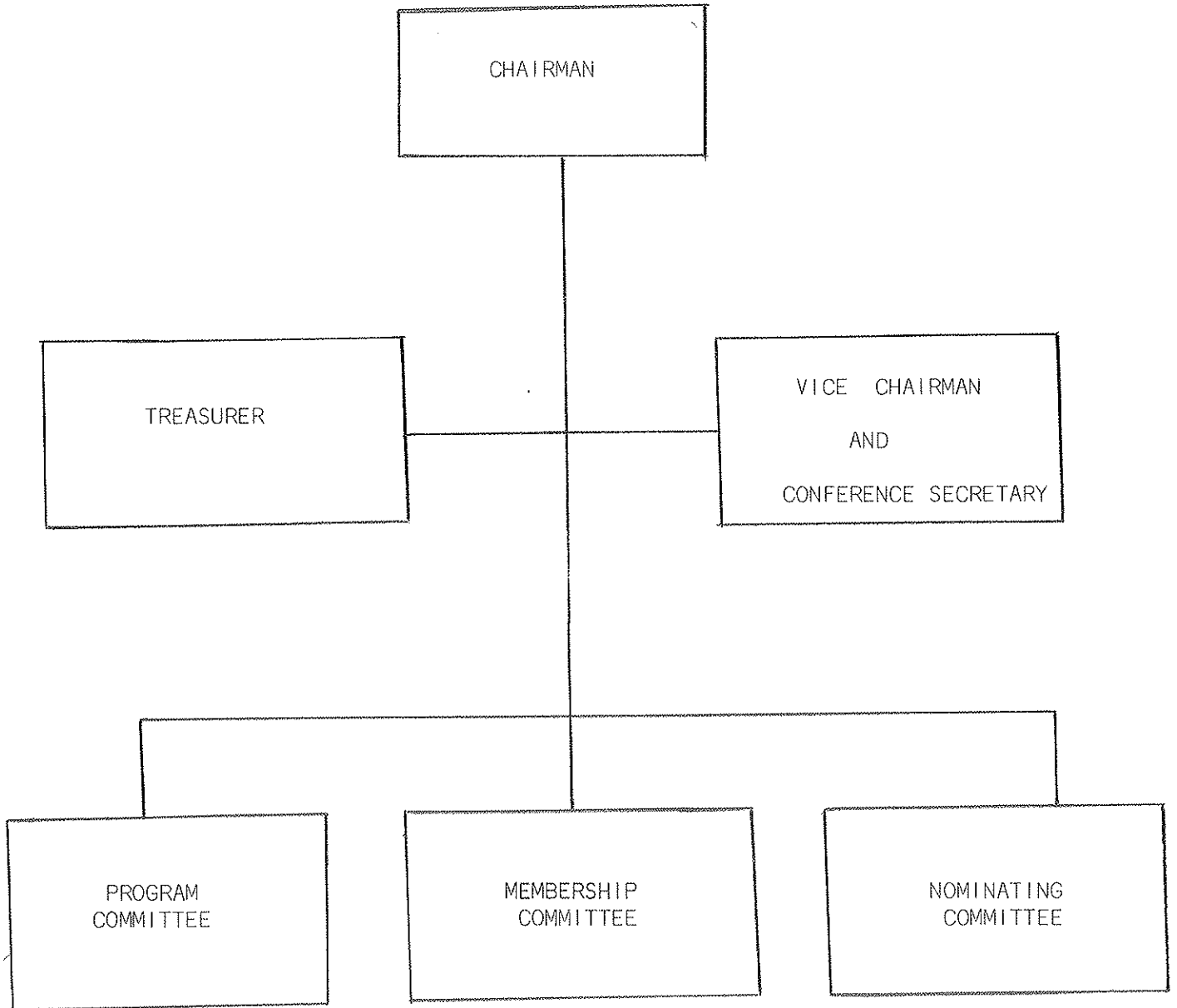
PROGRAM COMMITTEE: To determine program content and format for the annual conference and secure outside speakers and appropriate participation from the membership. To provide for subject continuity in programming when desirable. To select the time and place of the annual conference and make all conference arrangements. (This can be accomplished through the Management Services Department of NRECA, including registration). The committee chairman shall preside at all program sessions.

MEMBERSHIP COMMITTEE: Under the criteria established for admission to membership, select ten (10) organizations each year who are actively engaged in management in the rural electrification field who will be offered membership in the Association.

NOMINATING COMMITTEE: To nominate all officers and committee chairmen, as necessary, for submission to the annual conference for election. All nominations shall be submitted in writing, certified by the chairman of the committee, and deposited with the conference secretary.

EXECUTIVE ASSISTANT: To assist program committee as requested in planning and arranging for consultation programs. To keep permanent files for consultation group to assure continuity. NRECA Management Services will designate person to serve in this capacity.

MANAGEMENT CONSULTATION ORGANIZATION



OFFICERS AND COMMITTEES FOR  
1970 CONSULTATION

Chairman - C. E. Boulson	Term Expires in 1972
Vice Chairman - Barbara Deverick	Term Expires in 1970
Treasurer - Everett Bristol	Term Expires in 1971

Program

Chairman - Jim Golden	Term Expires in 1972
Glen Newton	Term Expires in 1971
Lawrence Moderow	Term Expires in 1972
Joe Ewald	Term Expires in 1970

Nominating

Chairman - Virgil Herriott	Term Expires in 1971
Bob Weathers	Term Expires in 1972
Jack McEnerney	Term Expires in 1972
Al Shjeflo	Term Expires in 1970

Membership

Chairman - Cecil E. Vivérette	Term Expires in 1971
Charlie Overman	Term Expires in 1972
Cliff Robertson	Term Expires in 1970
Bruce Bosworth	Term Expires in 1971

- A. All committee members and officers - elected for a 3-year term.
- B. Chairmen of each standing committee are named by the Nominating Committee and serve for 3 years when elected.



1970 MANAGEMENT CONSULTATION - REGISTRATION

Jekyll Island, Georgia

Mecklenburg Electric Cooperative  
Chase City, Virginia 23924  
Elwood T. Blackwell, Staff Assistant

Douglas County Electric Memb. Corp.  
Douglasville, Georgia 30303  
Charles Overman, Gen. Mgr.  
Charles L. Staples, Mgr., Office Svcs.  
C. W. Thompson, Asst. Mgr.

Aiken Electric Cooperative  
Aiken, South Carolina 29801  
James P. Stafford  
R. E. Thomson, Gen. Mgr.

Boone County Electric Cooperative  
Columbia, Missouri 65201  
Paul R. Henson, Mgr.

KEM Electric Cooperative, Inc.  
Linton, North Dakota 58552  
John J. Allenswork

West Plains Electric Cooperative, Inc.  
Dickinson, North Dakota 58552  
Olaf Sandvick, Staff Assistant  
A. L. Shjeflo, Manager

Four County Electric Membership Corp.  
Burgaw, North Carolina 28425  
L. P. Beverage, Manager  
Douglas Leary, Staff Assistant

Morgan County REMC  
Martinsville, Indiana  
Derl J. Hinson, General Mgr.

Sho-Me Power Corporation  
Marshfield, Missouri 65706  
Warren Johnson, Dr. Public Relations  
C. E. Boulson, Gen. Mgr.

Blue Ridge Electric Memb. Corp.  
Lenoir, North Carolina 28645  
Barbara Deverick, Staff Asst.  
Cecil E. Viverette, Gen. Mgr.

White River Valley Electric Cooperative  
Branson, Missouri 66616  
L. N. Speight, Manager  
Clifford Robertson, Executive Assistant

Sioux Valley Empire Electric Assoc.  
Colman, South Dakota 57017  
Virgil Herriott, Manager  
James M. Kiley, Asst. Mgr.  
Joe Ewald, Staff Assistant

Kay Electric Cooperative  
Blackwell, Oklahoma 74631  
Clyde Hukills, Asst. Manager  
Louis Strong, Manager

Central Kansas Electric Cooperative, Inc.  
Great Bend, Kansas 67530  
Jack D. Goodman, Manager

Horry Electric Cooperative  
Conway, South Carolina 29526  
H. O. Stogner, Jr., Manager  
Charlie Webster

Chugach Electric  
Anchorage, Alaska 99502  
L. J. Schultz, Gen. Mgr.

North Arkansas Electric Coop., Inc.  
Salem, Arkansas 72576  
Bob Weathers, Mgr., Management Svcs.  
Jack Cochran, Gen. Mgr.

Ozark Electric Cooperative  
Fayetteville, Arkansas 72701  
Millard Goff  
Tom Townsend, Adm. Asst.

Jackson Purchase Rural Elec. Coop. Corp.  
Paducah, Kentucky 42001  
Jean McKinney  
James E. Campbell, Gen. Mgr.

Shenandoah Valley Electric Cooperative  
Dayton, Virginia 22821  
Mark McNiel, General Manager

Yampa Valley Electric Association, Inc.  
Steamboat Springs, Colorado 80477  
James A. Golden, General Manager  
Everett C. Bristol, Staff Assistant

West Central Electric Cooperative, Inc.  
Higginsville, Missouri 64037  
Allan Swanson, Mgr.

Lake Region Electric  
Pelican Rapids, Minnesota  
Clarence W. Peterson

Cumberland Electric Membership Corp.  
Clarksville, Tennessee 37040  
John N. Dolinger, Gen. Mgr.  
Frank N. McGregor

1970 MANAGEMENT CONSULTATION -- REGISTRATION. — 1258516

Robert Kabat  
NRECA  
Washington, D. C.

Dr. Nathan Bailly  
Dean - School of Business Administration  
American University  
Washington, D. C.

Dr. W. D. Buel  
Consulting Industrial Psychologist  
Tampa, Florida

1970 MANAGEMENT CONSULTATION PROGRAM

The Buccaneer Motor Lodge  
Jekyll Island, Georgia

May 12

- 8:30 A.M. - Registration  
9:00 A.M. - Case Study on Employee Attitude Survey  
Charles Boulson  
10:30 A.M. - Position Evaluation Study  
Mrs. Barbara Deverick  
12:00 Noon - Lunch  
1:00 P.M. - Management in the 70's  
Bob Kabat  
3:30 P.M. - Adjourn

May 13

- 9:00 A.M. - What Makes an Executive Successful  
Dr. Nathan Bailly  
10:30 A.M. - Coffee Break  
Discussion & Questions  
12:00 Noon - Lunch  
1:30 P.M. - Human Relations and Effective Management  
Dr. Nathan Bailly  
3:30 P.M. - Adjourn

May 14

- 9:00 A.M. - General Membership Meeting  
Treasurer Report  
Election of Officers and Committee Members  
Selection of 1971 Meeting Time and Place  
Discussion: Objectives and Future of Consultation  
Boulson-Golden-Newton  
10:30 A.M. - Selection and Screening Aid for Rural Electric  
Management Personnel  
Dr. W. D. Buel  
11:30 A.M. - Adjourn

## CASE STUDY ON EMPLOYEE ATTITUDE SURVEY

By: Charles Boulson

Mr. Boulson discussed an attitude survey taken at Sho-Me Power Corporation in October, 1968. This survey was administered by Consultant Dave Faulkner, who also analyzed the results. One hundred Sixteen (116) employees, including management, supervisory, clerical and trades and crafts were involved in the survey. The results of the survey were presented to the employees using a visual slide presentation narrated by Mr. Boulson. The following remarks were made by Mr. Boulson when he reviewed the results of the survey with the employees.

### ATTITUDE SURVEY REVIEW

(October 1 - 2, 1968)

About the middle of May of this year we conducted an employee attitude survey under the direction of David Faulkner.

Today, we are going to review the results of this survey with you. It has taken Dave a little while to tabulate and interpret the results, but before we begin I have a few comments.

First, an attitude or opinion survey is highly subjective and cannot be measured in absolute terms such as a mathematical formula. Attitudes vary from time to time with each individual and sometimes hinge on how a person feels. Anyway, this survey reflects how you were thinking on May 15 or 16, 1968.

Second, we might ask ourselves what the results of this survey really means. Our company is a group of individuals who associate with each other practically every day. Therefore, aren't these results what we all think of each other? Some of the questions asked us to give our views about the "company", but aren't these our views about the people in the company and not about some far-off impersonal image we sometimes tend to think of? True, some of us have greater responsibilities than others, due to the nature of our jobs. And it is here that we can and do express our opinions as to how these responsibilities are carried out.

Third, to give us some measure of how we, as a group of employees working for Sho-Me, compare with other similar groups, Dave has summarized the answers we gave to his questions in 13 categories and then compared us with 30 other organizations in terms of high, low, and average, and a couple of degrees in between. In other words, he has averaged out these other 30 organizations and compared us with them.

We're going to show you how this comparison turned out and in the process show you how you answered each question. We've also broken this down into the various groups we have in our own company.

This is all on slides and I'll go through all of them first and then have some comments. (Slide presentation made.)

Now, as I said to begin with, this kind of a survey is highly subjective and although it has been presented in the form of graphs which might tend to pigeonhole ideas, it at best only gives us some general overview.

In my opinion, the one factor which contributes most to the below average or low position of some of the areas we looked at is COMMUNICATIONS.

Communications is a most difficult art. It is a wonder we get along with each other as well as we do. In addition, we tend to think of communications as the spoken or written word or as an instrument such as a telegram, a telephone, a television, a microphone or a letter. What really is communication, then? Is it understanding?

I always tell people that if they want to be understood to get a receipt for understanding. Let me illustrate. The following want ad appeared in a weekly newspaper recently, "Farmer, age 37, wishes to become acquainted with woman around 30 who owns tractor. Object matrimony. Send picture of tractor." You see, when we communicate with another person we do it from the standpoint of our understanding. When we receive a communication from someone, the reception is based on our understanding.

What I am trying to say is that if a person is in a position that gives him the right to desire a result that requires the help of other people, he will have attained good communications if that result is realized. In order to have this kind of communication (verified by a desired result) he must have the skill to understand people and to have them understand him. The skill to do this frequently produces mutual confidence even though it may not bring about mutual agreement.

I asked a moment ago, if communication wasn't understanding. Isn't it also a way of life? If so, it takes a lot of skill to attain it, and this skill can be increased with practice and special training.

Although our survey shows that we have an area of concern in communications, things do get done around here and we have achieved desired results to the best of our ability. Maybe what we are saying to each other is that there is a higher plateau of perfection to reach. And after we arrived, there would be another plateau. Excellence in communication requires time and is never perfect.

I suppose we have always sensed the presence of imperfections in our lives. Let me give you my personal view. I think imperfection is a wonderful thing. Without it, you and I would be sorry creatures. God made the garden perfect, and Adam made it imperfect. I sometimes think that Adam's problem wasn't apples, it was boredom. And why? Because the poor guy couldn't stand all that perfection. A perfect climate. A perfect wife. A perfectly dull time. So he made a very human mistake, and I suspect that he went out of the garden smiling. Outside the garden there was work to be done. There was a runaway stream to be dammed---a rocky field to be cleared---animals to be domesticated---a son to break his heart. But in the midst of imperfection, all that was best in Adam came out of him. He was shown to be a patient, loving man. He had goals in life. And every one of his goals was designed to make something a little less imperfect.

We are all sons and daughters of Adam. The willingness to live in the midst of human imperfection is a demand of life. We are all at our best when we try to make the world around us a little less imperfect.

That, I think, is why the work which you do is dignified--human--and indispensable. In striving to make ourselves perhaps a little less imperfect, we make tomorrow a little better.

GROUP DISCUSSION: After Boulson's presentation comments and questions from the group concerning what measures were taken to correct some of the things pointed up by the attitude survey brought out the following: (1) Weekly Employee paper called Action Line was started at Sho-Me. (2) Consultant Faulkner came to Sho-Me and held "in house" courses in supervision.

QUESTIONS RAISED IN THE GROUP DISCUSSION WERE: (1) What weaknesses do Electric Cooperatives have in employee relations and how can these weaknesses be overcome? (2) Has enough emphasis been given to the supervisor-worker relationships? (3) What is the consequence of downward "orders" with no feedback?

## POSITION EVALUATION STUDY

By: Barbara Deverick

I am pleased to appear before this group and report to you on the work of the committee formed at the request of the Management Services Department of the National Rural Electric Cooperative Association and whose efforts are being coordinated by NRECA Management Consultant Clyde Aultz.

### OBJECTIVES

The Job Evaluation Research Committee, as it has been designated, had as its objectives the following:

To develop plans or a plan to use in our member systems to evaluate all jobs:

In as simplified a manner as is possible with the required reliability and validity.

So the employee committees alone can arrive at consistent, reliable, relative evaluations.

So that the relative evaluations arrived at by Management Services Consultants and/or employee or management committees in the systems will have labor market validity, ie, the relative values placed on jobs internally, will be found to roughly coincide with the relative wages paid in the labor market for stable jobs- (those with no unusual shortage or other supply demand conditions).

To achieve these objectives, a five-member committee was selected, composed of personnel from rural electric systems of various sizes and with diverse organization structures. The committee members were asked to do analytical work at their systems to test the work to be done by the industrial psychologist, who was retained by NRECA, and Consultant Clyde Aultz, and provide guidance to them in their development of a basic job evaluation program for use in rural electric systems. (While the many versions of the NRECA evaluation program which are now in use by the REC's were analyzed, the program which the committee is presently working on is so different that I feel it can be referred to as a new, rather than a revised, program.)

### COMMITTEE MAKE-UP

This committee is composed of the following persons:

Thomas Barker, Manager, Shelby Electric Cooperative, Shelbyville, Kentucky - System has 5,000 members, 30 employees and has NRECA wage and salary plan installed in 1961 (Three schedules).

Albert C. Hampel, Manager, Administrative Services Department, Brazos Electric Power Co-op, Inc., Waco, Texas - Generating and Transmission system serving 19 member cooperatives, 185 employees, NRECA wage and salary plan installed in 1964 (Four schedules).

Holmes Harrison, Director, Management Services, Flint Electric Membership Corporation, Reynolds, Georgia - System has 22,500 consumers, 150 employees, NRECA wage and salary plan installed in 1966 (Four schedules).

Ronald Forneris, Staff Assistant, Dairyland Electric Co-op, Inc., Grand Rapids, Minnesota. System has 7,000 members, 33 employees, Diefenback wage and salary plan installed in 1959, revised in 1967 using NRECA manuals (Three salary schedules).

Barbara Deverick, Manager, Organizational Planning and Personnel Services, Blue Ridge Electric Membership Corporation, Lenoir, North Carolina - Transmission and distribution

system, 25,000 members, NRECA wage and salary plan installed in 1960, revised in 1964 by Consultant James Kelly adding fourth manual (Four salary schedules).

The consultant secured to work with the committee was Dr. Jay L. Otis, Industrial Psychologist, Case-Western University, Cleveland, Ohio. Dr. Otis is Professor of Psychology and Director of the Psychological Research Services at Case-Western Reserve University and author of a textbook on job evaluation which is in its second printing. In addition to his work with the university, Dr. Otis does private consulting and has authored many job evaluation plans for banks, utilities, manufacturing, and other types of organizations. Dr. Otis has access to the large computer at the university to use in doing the necessary analysis on the multiple correlation of the factors used in the manuals which has enabled the committee to test its work as it has developed each manual. Clyde Aultz, because of his background in management consulting, industrial relations and public administration, and his interest in the problem from a consultant's viewpoint, has made a fine coordinator for the work of the committee.

Under the guidance of Dr. Otis and the coordination of Clyde Aultz, the committee is performing the necessary research which is leading to the development and testing of plans which are designed to replace the present job evaluation program now in use by NRECA.

#### EXISTING CONDITIONS

When the committee began work, it set out to determine just what the existing conditions were with regard to those systems which had installed systematic job evaluation and wage and salary programs. The findings of the committee confirmed our belief that an updating of the program was very much needed.

#### Personnel and Organization

We determined that the 991 borrowers of REA in 1966 averaged 32 employees, with systems ranging from around eleven employees for the smallest to about 160 for the larger distribution systems. Most of the borrowers are, of course, electric distribution utilities with generally common functions. There are, however, about 40 borrowers for generation and transmission facilities. Probably 20 or so generation and transmission, or transmission alone, organizations exist, where functions are different or partly different from those in distribution systems.

#### Job Evaluation Plans

Basically, we found three job evaluation plans had been used over a period of perhaps ten years. The trades and crafts plan and the clerical plan started off as almost identical and very similar to National Metal Trades Association and National Electrical Manufacturers Association plans. The management, supervisory plan presently in use is related to the General Foods plan. Looking at the basic plans which NRECA has used over the years in working with the REC's for installation of salary plans, we found that there had been a gradual change in the plans over the years in (1) Factor and degree step definitions; (2) Points assigned to degree steps; (3) Degrees added to factors; (4) New factor added in the Clerical Plan.

#### Problems in Using Present Plans

When we tried to determine what major problems were encountered in making use of the job evaluation plan presently in use by NRECA we found many things were identified. Some of the problems listed were:

- (1) Evaluation committees were unable to evaluate the job by the description alone.
- (2) Committees unsuccessful in trying to re-evaluate changed jobs or evaluate new jobs.
- (3) Management having to decide which grade the new or changed job fits into and then

juggle the points to make it fit.

- (4) Considerable variation in job descriptions written by consultants (NRECA and other), making it difficult to relate wage survey data.
- (5) Variation in the compensation plans installed. Some consultants practice setting minimums at the labor market average and use 40% range for all grades. Others place labor market average at midpoint of grade and use 20% to 35% range in grades with 5, 6, 7 steps, etc.
- (6) Three compensation plans not meeting system needs, need a fourth plan for certain systems to take care of supervisory and technical positions.
- (7) Some positions do not get a fair evaluation under the present factors. Observation indicates that the factor weights just do not produce the proper relationships among jobs.
- (8) Present management plan presents biggest problem. Use of plan has caused preparation of position descriptions which are related to the factors of the plan; for example, Planning, Study and Research.
- (9) Trades and crafts and clerical plans need widening of increments of experience.
- (10) Trades and crafts and clerical plans are getting us into trouble, too, because the systems are saying all employees hired must have a high school education, whereas a job may only require the academic knowledge of ability to read and write and do simple arithmetic.
- (11) One of the complications of deciding which plans to evaluate certain jobs under, is that of exempt and non-exempt personnel. For example one system only has four out of 98 employees on the exempt payroll.
- (12) The key jobs in the plan do not always represent the positions most affected by outside wage pressures. Examples: Lineman 1/c or Electrical or Agricultural Engineers.

The committee also recognized that any plans developed would probably be used by employee committees in the rural electric systems. The plans would have to recognize the relative inexperience and unsophistications of system personnel as related to job evaluation, as well as the varied nature of jobs from one system to another, and the conglomerate of duties grouped in individual jobs because of small size.

It was the feeling of the committee that some nationwide bench mark positions could be established in the rural electric distribution systems and possibly some of the generation and transmission systems could be included. This would require basic position descriptions written in the clearest and most concise terms possible. The committee further agreed that every effort should be made to utilize the results of the work done by the U. S. Department of Labor in establishing the level of knowledge, skill, aptitude, temperament, interest, and working conditions for some 250 criterion jobs including the position of lineman. This standardized approach based on the Department of Labor's findings would also be useful in validating employment tests.

At the first meeting of the committee, in addition to reviewing the conditions mentioned above, a discussion was held of the problems the committee members were experiencing on their respective systems in administering their total wage and salary program and the results were similar to those already mentioned. Several of the members mentioned the problem of evaluating professional people under the present programs.

#### PLAN OF ACTION

The plan of action which came out of the first meeting looked fairly simple, but as time went on, we have found it to be both complex and time-consuming. I might also say; however, it is an extremely rewarding experience. The plan for the committee was:

- (1) To do a study of the present manuals in use.
- (2) Determine number of different manuals needed.



- (3) Determine factors for each manual based on (a) need, and (b) face validity.
- (4) Build manuals.
- (5) Rate sample of jobs.
- (6) Finalize manuals.

We further agreed to call the plan, "The Uniform Evaluation Plan".

#### PROGRESS

The committee began by furnishing the consultant the points used on all factors in the plans we are currently using and total points for all jobs. Clyde Aultz furnished market rate data on "key" jobs to the consultant to be correlated with the point data the committee furnished.

Dr. Otis, the consultant, proceeded to program into the computer, using the Wherry-Dolittle selection plan, the information sent him on the job evaluations made by several systems under the plans currently in use to determine which of the factors in the plans correlated, and carried the greatest weight in the plans. Actual dispersion of factor in systems should determine weight.

#### Multiple Correlations

To provide an example of the type of study made of each plan, I will briefly review the correlation of the factors between four systems under the Management Plan.

<u>Company No. 1</u> <u>Factor</u>	<u>Correlation</u> <u>Ratios</u>	<u>Company No. 2</u> <u>Factor</u>	<u>Correlation</u> <u>Ratios</u>
Planning	.89	Decisions	.84
Influence on Progress of Organization	.95	Number of Emp. Supervised	.97
Number Supervised	.96	Creativity	.99
Study and Research	.99	Planning	.996
Decisions	.998	Influence on Progress of Organization	.999
Creative Work	.999	Type of Supervision	.999
Contacts	1.000	Study and Research	.999
		Contacts	.999
<u>Company No. 3</u> <u>Factor</u>	<u>Correlation</u> <u>Ratios</u>	<u>Company No. 4</u> <u>Factor</u>	<u>Correlation</u> <u>Ratios</u>
Decisions	.90	Planning	.84
Type of Supervision	.96	No. of Emp. Supervised	.90
Influence on Progress of Organization	.99	Contacts	.96
Creative Work	.99	Study and Research	.98
Planning	.997	Influence on Progress of Organization	.98
No. of Emp. Supervised	.998	Creative Work	.99
Study and Research	.999	Decisions	.99
Contacts	1.000	Type of Supervision	.992

This gives some indication of the intra-system weight placed on each factor. When the information was analyzed for the five systems that had provided information to be analyzed on the Management Plan, and taking only the factors which appeared in the first five correlation rank order, we found the following:

<u>Factor</u>	<u>Appearing</u>
Planning	5 times
Number Supervised	5 times
Influence on Progress of Org.	4 times
Type of Supervision	3 times
Study and Research)	
Decisions )	
Creative Work )	
Contacts )	2 times

Dr. Otis, commenting on the Management Plan, pointed out that the factor, "Planning", correlated highly with the total points. He also stated that "Contacts" appeared to be a constant and that this factor should be retained because in the utility industry, on positions in the Management Plan, we should probably assume goodwill and public relations.

We then determined from reviewing the multiple correlation ratios for the systems submitting data on positions evaluated under the other plans in use that we should develop four manuals:

- (1) Office-Clerical (Non-exempt)
- (2) Operations Skills (T & C Non-exempt)
- (3) Management-Supervisory (Administrative-Management)
- (4) Engineering-Technical (Professional)

It was felt that four manuals were needed in order to assure adequate plans for evaluation of related positions.

#### Development of Office Clerical and Operations Skills Manuals

The committee worked from July, 1969 through March, 1970 on the factors and definition of factors for trial manuals for Office-Clerical and Operations-Skills. These manuals have been tested on key jobs by the committee members using tentative point values assigned to the factor degrees by the consultant; the first computer test indicates good progress is being made in building the Office-Clerical Plan. The factors and degrees which the committee has agreed upon for the Office-Clerical Plan are:

<u>Factor</u>	<u>No. Degrees</u>	
Knowledge	3	
Experience	5	(Present NRECA
Judgment	3	Plan has 12 Factors)
Dexterity	3	
Responsibility for Guidance of Others	3	
Contacts	3	
Confidential Information	4	
Consequence of Error	3	

In addition to the development of the definitions of the factors and the degree levels, the committee is also working with Dr. Otis in the development of rules of application for each factor which give explicit guidance to the evaluator in applying the factor to positions in the plan. We have also tried to use terms which are familiar to the people in the rural electric systems to make the plan relate as closely as possible to the rural electric program (instead of borrowing phrases from other industries or organizations).

Similar work has been done on the Operations Skills Manual. In both the Office-Clerical and the Operations Skills Manuals, a factor or two was used for face validity and does not actually contribute greatly to the total value of the positions being evaluated under

the plan. This was done to assure acceptance by system personnel. An example of this in the Office-Clerical Manual would be the Dexterity Factor, and in the Operations Skills Manual the factor, "Working Conditions" or "Physical Demands".

Factors and degrees agreed upon for the Operations Skills Manual are as follows:

<u>Factor</u>	<u>No. Degrees</u>	
Knowledge	4	
Experience	7	(Present NRECA
Physical Demands	4	plan has 13 factors)
Contacts	3	
Responsibility for Tools, Equipment, and Materials	4	
Supervision of Others	5	
Hazards	4	
Working Conditions	4	

#### Factor Definitions

To give you some idea of the way the factors are defined, the degree levels identified, and the rules of application, let us look at the factor of Contacts in the Office-Clerical Manual and then at the factor of Responsibility For Tools, Equipment, and Materials in the Operations-Skills Manual.

From the Clerical Job Evaluation Manual - Factor, "Contacts". . . . .

This factor measures the requirements for cooperation, tact, diplomacy, and good judgment in dealing with people within the system and with others outside, either by personal contact, telephone, or correspondence.

#### Level

#### Points

1. Personal contacts limited principally to routine dealings (furnishing or obtaining information usually upon request) with other employees in the system or organization. Not an important part of the job.
2. Has regular contacts with other employees in the system, routine contacts with outsiders (members, consumers) in furnishing and/or obtaining information or reports; requires tact to avoid misunderstanding in contacts and improper handling could affect results of the contact. Responsibility for harmonious relationships is assumed by the supervisor.
3. Has contacts by telephone, correspondence or personal meetings with people in the system or organization or outside the organization to obtain or supply factual information in situations where problems and complaints may be involved. Tact is required in these contacts and the employee is responsible for harmonious relationships.

#### Rules of Application

1. Contacts are an important aspect of the utility industry and vary in importance from job to job. The goodwill and public relations aspect is expected of all employees and each employee is expected to represent the organization in a favorable manner. Contacts as measured by this factor are "job related" and are an essential part of the job.
2. Level 1 is assigned to positions which are primarily inside and where ordinary courtesy is sufficient.
3. Level 2 is assigned to positions such as cashier/teller, telephone operator, meter reading and member accounts clerks, and to other positions specifying some outside contacts as part of the job.
4. Level 3 is assigned to positions in such areas as purchasing, personnel and positions where incumbents represent those in higher level positions to the public.

From the Non-Exempt Operations Skills Job Evaluation Manual - Factor, "Responsibility For Tools, Equipment, and Materials".....

This factor measures the job requirements for preventing loss to the system through the exercise of responsibility for the care of tools, equipment, and materials. It takes into account the employee's responsibility for making sure that tools, equipment, and materials are used properly and that responsibility for maintenance care and guarding against loss is exercised. (Responsibility for collision damage to vehicles, such as trucks, and cars used on the open road is not to be rated.)

Level

Points

1. Little or no responsibility for loss since probability is low and cost slight. Hand tools and inexpensive materials. Loss hardly ever exceeds a hundred dollars.
2. Responsible for proper use and maintenance of such things as pneumatic tools, power saws, chain saws, vehicle maintenance, and reasonably expensive materials. Loss in hundreds of dollars, rarely if ever exceeds a thousand dollars.
3. Responsible for proper use and maintenance of heavy equipment, expensive tools, and materials. Loss would be of concern to management, could reach thousands of dollars.
4. Responsible for proper use and care of such things as high-voltage generators, substation transformers, etc. Accountable for materials where loss could be of major financial concern. Loss extremely serious.

Rules of Application

1. In applying this factor, disregard insurance coverage.
2. Level 1 is used where the position requires little responsibility for tools, equipment, and materials. Probability of loss is very low.
3. Level 2 position involves the use of equipment where loss is probably through misuse or improper care. Probability is always present.
4. Level 3 position is similar to one rated Level 2 with equipment of greater value.
5. Level 4 is reserved for positions where improper use of maintenance could result in loss which would be most serious.

We are now in the process of refining the Office-Clerical and Operations Skills Manuals and have at least ten systems in addition to the systems represented on the committee who will give these manuals a field trial by evaluating their jobs under these manuals which will give us further test data for additional refinement.

The committee tentatively agreed at their March, 1970 meeting on factors for the Management-Supervisory, and the Engineering-Technical Plan as follows:

Management-Supervisory  
Factors

Knowledge  
Experience  
Planning and Originating  
Character and Scope of Supervision  
Exercised  
Character of Supervision Received  
Contacts  
Consequence of Decisions (Accountability)

Engineering-Technical  
Factors

Knowledge  
Experience  
Planning and Resourcefulness  
Character and Scope of Supervision Exercised  
Character of Supervision Received  
Contacts  
Environmental Conditions  
Consequence of Decisions (Accountability)

Dr. Otis is presently working on factor definitions using notes from committee discussions and the draft manuals will be sent to the committee as soon as they are completed for trial evaluations.

## Future Work

A technical report is being prepared by Dr. Otis which will show the analysis of the present plans and the statistical work done in developing the new plans. The next meeting of the committee is tentatively set for the week of June 29, 1970 in Washington, D. C. At this time, Dr. Otis and the committee will report to the Director of Management Services at NRECA and his staff on the progress made and emphasize the point of the need for uniformity of thought on the use of a single job evaluation program by the consultants in the Management Services Department, including use of standard job analysis, position description, and job specification formats. Clyde Aultz feels that it is most important that this understanding be obtained with Management Services personnel as we proceed.

When the manuals are completed and the factors weighted to reflect their relative importance as determined by the field testing and labor market data, the committee will utilize the information collected and analyzed in the development of the manuals to develop basic job descriptions for key positions in each of the four plans which could be utilized throughout the nation.

How long will this take? Our target date for completion of all manuals ready for use by NRECA and its member systems is September, 1970. To complete the entire job, will require considerable more time.

I would like to see the committee move into the next phase of the complete administration of a Wage and Salary Program and this is into standards of performance and an objective merit rating plan.

Certainly the work of the committee will greatly aid the administration of the national compensation survey and should lend increased validity to the data collected.

## Group Discussion

Group mentioned that perhaps new manuals should refer to Rural Electric Cooperative instead of "system".

Jim Kiley stated that no wage and salary plan is a panacea. Mr. Kiley also cited Robert E. Sibson's book published by AMA, "Wages and Salaries" (revised edition) as excellent resource material in evaluating and revising a wage and salary program.

Some of the problems in job evaluation were discussed, including difficulty in utilizing employee committees for doing job evaluation.

Reference: Otis & Leukart, Job Evaluation, A Basis For Sound Wage Administration  
Prentice Hall

## MANAGEMENT IN THE 70's

By: Robert Kabat

Changes in the Rural Electrification program were discussed by Mr. Kabat with emphasis in these areas:

What is happening to Membership - Systems are getting both a younger and older membership. This change in membership should influence a lot of things systems are doing. The point was made that systems should be concentrating on the younger age (17 - 34 years) group of members since there would be a 30% increase in this group of members during the 1970's.

Systems are now serving 70% non-farm membership.

Implications of the changes in membership are - Members no longer interested in history, they are interested in what can be done for them today.

Systems must look at - continuity of service - services offered - rate obsolescence - type of personnel. Must have some basic research on how to reach members.

The challenge was given to the Management Consultation group to do basic research on how to reach the new breed of members and the suggestion made that this work be guided by a research committee.

What is happening to Boards of Directors

What is happening in Employee Relations were touched on briefly by Kabat.

References used in Mr. Kabat's presentation were:

John Gardner, The Recovery of Confidence

Robert I. Kabat, Rural Electric Management in the 70's, presentation made at First Annual Director's Conference, January, 1970.

Robert I. Kabat, Blending Experience and New Blood--The Director Emeritus, presentation made at NRECA Annual Meeting, February, 1970.

Robert I. Kabat, Your Decade of Opportunity, presentation made at Colorado Employee Orientation Program, April, 1970.

Copies of the three references authored by Mr. Kabat were presented to those attending the consultation.

### GROUP DISCUSSION

Group discussion included ideas for meeting needs of changing membership and need for updating fringe benefits program for employees.

## WHAT MAKES AN EXECUTIVE SUCCESSFUL

BY: Dr. Nathan Baily

### Notes from Dr. Baily's presentation

"What makes an Executive Successful?

His words and deeds all mesh,  
I'd like to see one in the flesh."

What does a manager (executive) do? (See attached "Executive Has Nothing to Do") # 1

Role of Manager is building an Organization.

Organization is tool to do a job that is too big for an individual. (Used illustration of cave man trying to move boulder and obtaining assistance from fellow cavemen.)

Manager's job is to multiply himself.

Definition of Organization: Organization is a collection of individual human beings, each different, each with authority, accountability and interrelations working together as a group to achieve an objective.

Management defined: Management provides the leadership, the decision making, the policy formulation and implementation which makes an organization function, achieving its results through other people.

As people move up in the organization to management, their technical skill is replaced with human relations skill.

As a person moves up in the organization a third skill is required - Conceptual Skill - (The Manager must think in terms of the total organization).

There are two dimensions which make a manager's job successful - the managerial dimension and the operating executive dimension. For a manager to grow and achieve desired results in his managerial position, the managerial dimension should continue to enlarge and the operating aspect diminish.

One reason some managers are not successful is that they fail to develop the third skill - conceptual thinking.

Another reason a manager is not successful is that he does not know what his job is.

The job of the boss (manager) is to do those things which are most important for the welfare of the organization, which only he can do.

Most managers know this, but few practice it.

Andrew Carnegie, in commenting on his success said, "I always try to hire people who know more than I do."

Managers should not be bogged down with trivia (example of Moses and Jethro and the Exodus was given). The point was made that a good secretary could help a manager be a better manager if he would permit her to do so.

Another aspect of success or failure of a manager is DECISION MAKING.

Executives must make decisions. They cannot take the "Heads I win, Tails I lose" attitude. If an executive cannot stand the heat, he must get out of the kitchen.

The executive is exhorted to do many things. (See attached "Dilemmas of Executive".) (# 2)

Executives must make decisions, they must delegate.

Batting average of an executive with three people reporting to him, where the boss has three projects to complete but will not delegate because he does not think his three people are able to handle them and boss is able to complete only one of the projects is shown below.

Boss is able to complete only one project with 100% efficiency, giving him an average for the three projects (two left completely undone) of 33 1/3 percent.

If boss had delegated a project to each of the three people and they had completed them as follows; one project at 70% efficiency, one project at 65% efficiency, and one project at 60% efficiency, all three projects would have been done and the team average for the three projects would have been 65% or twice that of the boss.

Management functions were reviewed.

Planning Function - Manager looks at future and (1) sets goals which will not permit organization to become obsolete; (2) must then engage in an audit of organization strengths and weaknesses to determine whether organization can meet goals.

Organizing Function - (1) Allocate resources to meet goals; (2) structure organization to meet goals. Have a task oriented organization. Organization must have balance.

Coordinating Function - The more a big job is broken down into little jobs, the more need to unify - COMMUNICATION IS THE KEY. The bigger the organization, the more important and the more difficult coordination is.

Motivating Function - Help people want to do the job.

Control Function - Calls for the administrative process. Know where you are in relation to where you want to be.

ALL MANAGEMENT FUNCTIONS SHOULD BE TIED TOGETHER IN THE BUDGET.

The control function involves predetermining where you want to be, finding out where you are, measuring the difference (determining the variance), and FEEDBACK. (Find out quickly.)

The best way of obtaining control information was discussed and the emphasis for good, sound, necessary information was given. The statement concerning the type of information and the speed with which data could be processed on computer gave emphasis to the fact that if poor information is given, the results or answers will be of the same quality. (GIGO - "Garbage in - Garbage out".)

The point was made that job descriptions should incorporate results statements.

The performance of subordinates was discussed and the following points made - Face up to the issue if the man is not doing the job. Two aspects may be considered: (1) Can the man, if certain constructive actions are taken, do the job properly. (2) If he tries, but does not have it, can lateral changes be made, special assignments given? GIVE HIM A JOB HE CAN DO WELL.

#### GROUP DISCUSSION

Louis Strong raised the question of the problem of manager replacement.

Dr. Baily stated that an organization must be willing to give people time to succeed.



Some of the points brought out on employment and development of people for managerial positions were:

Average starting salary for American University graduate with MBA is \$12,000.

Encourage the best of the organization's people to get education needed in the organization.

Organize Junior Management boards to work on problems.

Biggest thing of all needed in the Rural Electrification program is Good People for management positions.

The question was raised by Jim Kiley as to what management students are coming up with by way of techniques to help apply principles.

The point was made that consultants can only advise; they cannot implement for Rural Electric systems.

Dr. Baily stated that One must be careful that tools are tools and not crutches and that One doesn't use them to impress the board. Two things are needed: (1) Improve Knowledge - keep up with management. Be careful not to buy a "pig in a poke". Don't jump on a band wagon. (2) Ask, "How do I apply this information?"

Dr. Baily concluded the discussion by stating - "THERE ARE NO PERFECT ANSWERS TO ANYTHING IN MANAGEMENT."

EXECUTIVE HAS NOTHING TO DO

As everybody knows, an executive has practically nothing to do. That is, except:

To decide what is to be done; to tell somebody to do it; to listen to reasons why it should not be done, why it should be done by somebody else, or why it should be done in a different way, and to prepare arguments in rebuttal that shall be convincing and conclusive.

To follow up to see if the thing has been done; to discover that it has not been done; to inquire why it has not been done; to listen to excuses from the person who should have done it and did not do it.

To follow up a second time to see if the thing has been done; to discover that it has been done, but done incorrectly; to point how it should have been done; to conclude that as long as it has been done, it may as well be left as it is; to wonder if it is not time to get rid of a person who cannot do a thing correctly.

To consider how much simpler and better the thing would have been done had he done it himself in the first place; to reflect sadly that if he had done it himself he would have been able to do it right in twenty minutes but that as things turned out he himself spent two days trying to find out why it was that it had taken somebody else three weeks to do it wrong; but to realize that such an idea would strike at the very foundation of the belief of all employees that an executive has nothing to do.

"If he's pleasant, he's too familiar,  
If he's sober-faced, he's a sour puss.  
If he's young, he doesn't know anything,  
If he's old, he's an old stiff.  
If he belongs to a lodge, the members expect favors.  
If he goes to church, he's a hypocrite,  
If he doesn't, he's a heathen.  
If he drinks, he's an old souse,  
If he doesn't, he's a tight-wad.  
If he talks to everybody, he's a gossip,  
If he doesn't, he's stuck-up.  
If he insists that the rules be kept, he's too particular,  
If he doesn't, he's careless.  
If he looks around, he's snooty,  
If he doesn't, he's unobservant.  
If he tries to settle all complaints, he must have the wisdom  
of Solomon,  
If he worries about them, he will soon have ulcers.  
If he's late for work in the morning, he's taking advantage  
of his position.  
If he gets in on time, he's an eager beaver.  
If the office is running smoothly, he's a dictator.  
If it's not, he's a poor administrator.  
If he holds regular staff meetings, he's in desperate need  
of ideas.  
If he doesn't, he's on his way out.  
If he goes to conventions, he's on the gravy train.  
If he doesn't, he's not important.  
If he tries to get more personnel, he's an empire builder.  
If he doesn't, he's a slave driver.  
If he's friendly with the office personnel, he's a  
politician.  
If he keeps to himself, he's a snob.  
If he makes decisions quickly, he's arbitrary.  
If he doesn't, he can't make up his mind.  
If he works on a day-to-day basis, he lacks foresight.  
If he plans ahead, he's a dreamer.  
If he tries to cut red tape, he has no regard for system.  
If he insists upon going through channels, he's a bureaucrat  
at heart.  
If he enjoys reading this, he has a good sense of humor.  
If he doesn't think it's funny, he's entitled to his opinion."

HUMAN RELATIONS AND EFFECTIVE MANAGEMENT  
(GETTING RESULTS THROUGH OTHER PEOPLE)

By: Dr. Nathan Bailly

Notes from Dr. Bailly's presentation

These things motivate employees to do a better job. (Employees' answers)

- (1) Being treated as an individual.
- (2) Getting credit for what I have done well.
- (3) Getting Clear Instructions.

People operate on a daily basis at between 3% and 30% efficiency. There is need to light some figurative fires under personnel to get them to do what they are capable of doing.

People are different; therefore, canned answers and pat cliches won't work.

Ask yourself the question, "Are the "hot buttons" that motivate you today the same ones which motivated you ten years ago?"

Human Relations require EMPATHY.

The past always lives on in the present. We are all conditioned by past experiences.

Actions versus words. "I am sorry I cannot hear your words because your actions are speaking so loudly."

Manager should know how to use the word, WHY.

God gave us two Ears and one Mouth because we are to listen twice as much as we talk.

The problems of people are primarily emotional problems. Therefore, logic does not apply.

Get people to talk; this gives them perspective.

The manager has a different perspective from his people.

After making an assignment, have a person tell you in his own words what you have assigned to him.

When consultants look at "the statics" (personnel who have not advanced) in the organization and find them in leadership roles in the community, they ask the boss "Why".

Important words for a manager -

- Five words - "I am proud of you."
- Four words - "What is your opinion?"
- Three words - "If you please."
- Two words - "Thank you."
- Least important word - "I"

The manager is the prisoner of the people who work for him - the people make or break the manager.

GROUP DISCUSSION

Charles Overman asked how to give constructive criticism to employees. Dr. Bailly answered by saying, make criticism work for you by being constructive in your criticism.

The question, "What about tension in an organization", was raised by the group. The answer

given was to harness tension and make it constructive. Managers must be aware of tension in their organization and sometimes may create constructive tension.

Question: "What can a manager do to bring out capabilities of a department manager?"  
Answer: Responsibility can be a factor for development. Give the man responsibility. Find out what his "hot button" is. "Hot Buttons" vary in people and vary with their stage of development.

Most people want to/<sup>be</sup>proud of what they do. This is a tool that can be used in the development of a subordinate.

Dr. Bailey concluded the discussion by saying that the job of learning to be a manager is never finished. No one ever completes studying and preparing for it. This is the nature of profession.

He told the story of the man in New York City who wanted to find his way to Carnegie Hall to hear a concert. He stopped and asked a little old man on the street, "How do you get to Carnegie Hall?" The little man replied, "Practice, practice, practice, my son."

Dr. Baily pointed out that if you practice wrong habits, you won't make the Carnegie Hall of Management.

He then read "An Administrator's Prayer". (See attached copy of prayer.) # 3

# 3

AN ADMINISTRATOR'S PRAYER

"Grant me the self-awareness to know honestly what I am, what I can do, and what I cannot;

Grant me the judgment to channel my energies into those avenues which best utilize my abilities and do not require talents which I do not possess;

Grant me the wisdom cheerfully to admit error and learn from my experiences, that I may grow and develop and avoid repetition of mistakes;

Grant me the humility to learn from others, even though they be younger, less experienced, or of humbler station than I;

Grant me the courage to make decisions whenever they are necessary and to avoid rashness when they are not;

Grant me the sensitivity to judge the reactions of others that I may modify my actions to meet the needs of those affected;

Grant me the consideration to recognize the worth of each individual, and to respect all those with whom I have contact, neither stifling their development nor exalting myself at their expense;

Grant me the perspicacity to acknowledge that I can be no more effective than my subordinates enable me to be, and to deal with them so that they can help me by helping themselves;

Grant me the tolerance to recognize mistakes as a cost of true learning and to stand behind my subordinates, accepting my responsibility for their actions;

Grant me the insight to develop a personal philosophy, that my life may have more meaning and satisfaction and that I may avoid capricious action under the pressures of expediency;

Grant me the patience to live realistically with my circumstances, striving always for the better, but recognizing the perils of too rapid or too drastic change;

Grant me all these things, dear Lord, that I may live a more useful life, through serving my fellow men, and through them, serve Thee."

Robert L. Katz in Harvard Business Review  
1/2/57

## SELECTION AND SCREENING AID FOR RURAL ELECTRIC MANAGEMENT PERSONNEL

By: Dr. W. D. Buel

The Consultation Group was addressed by Dr. William D. Buel of Byron Harless, Schaffer, Reid & Associates, Tampa based Industrial Psychologists. Dr. Buel outlined his proposal for a biographical and personal history study of department heads, a study designed to provide NRECA with improved methods for identifying management potential.

The advantages of the biographical approach rest in its validity, in the fact that biographical forms require but minutes for completion, and in the fact that resistance to such forms is minimal - they resemble the typical application blank. Also, however, personal history and job relevant information is among the most reliable data collectable from job applicants - applicants concede the relevance of it in personnel assessment - and a biographical assessment program would be completely administerable and interpretable by our members.

Dr. Buel explained that the study he proposed could be conducted through the mails, up to and including the solicitation of completed biographical questionnaires and managerial performance ratings. He also indicated that he would work with a representative sample of our membership. And to give us a feeling for such an approach, he reported the results of numerous such studies, all of his own design, studies which, like the one he has proposed to us, gave rise to selection devices "tailor made" to the organizations sanctioning them. Finally, he indicated that such a study would take only 5 to 6 months for completion - that a final report would be rendered to us no later than 90 days after all questionnaire and managerial performance ratings had been made available to him. (See project information attached.)

### GROUP DISCUSSION

Group agreed that the type of selection tool Dr. Buel was proposing would be useful in screening and selecting applicants for department manager positions.

**A PROGRAM FOR  
IDENTIFYING MANAGERIAL TALENT**

**PRESENTED TO THE CONSULTATION GROUP  
OF THE  
NATIONAL RURAL ELECTRIC COOPERATIVE ASSOCIATION  
JEKYLL ISLAND, GEORGIA  
MAY 14, 1970**

**WILLIAM D. BUEL, PH.D.  
CONSULTING INDUSTRIAL PSYCHOLOGIST  
BYRON HARLESS, SCHAFFER, REID & ASSOCIATES, INC.  
TAMPA, FLORIDA**



## PROJECT OUTLINE

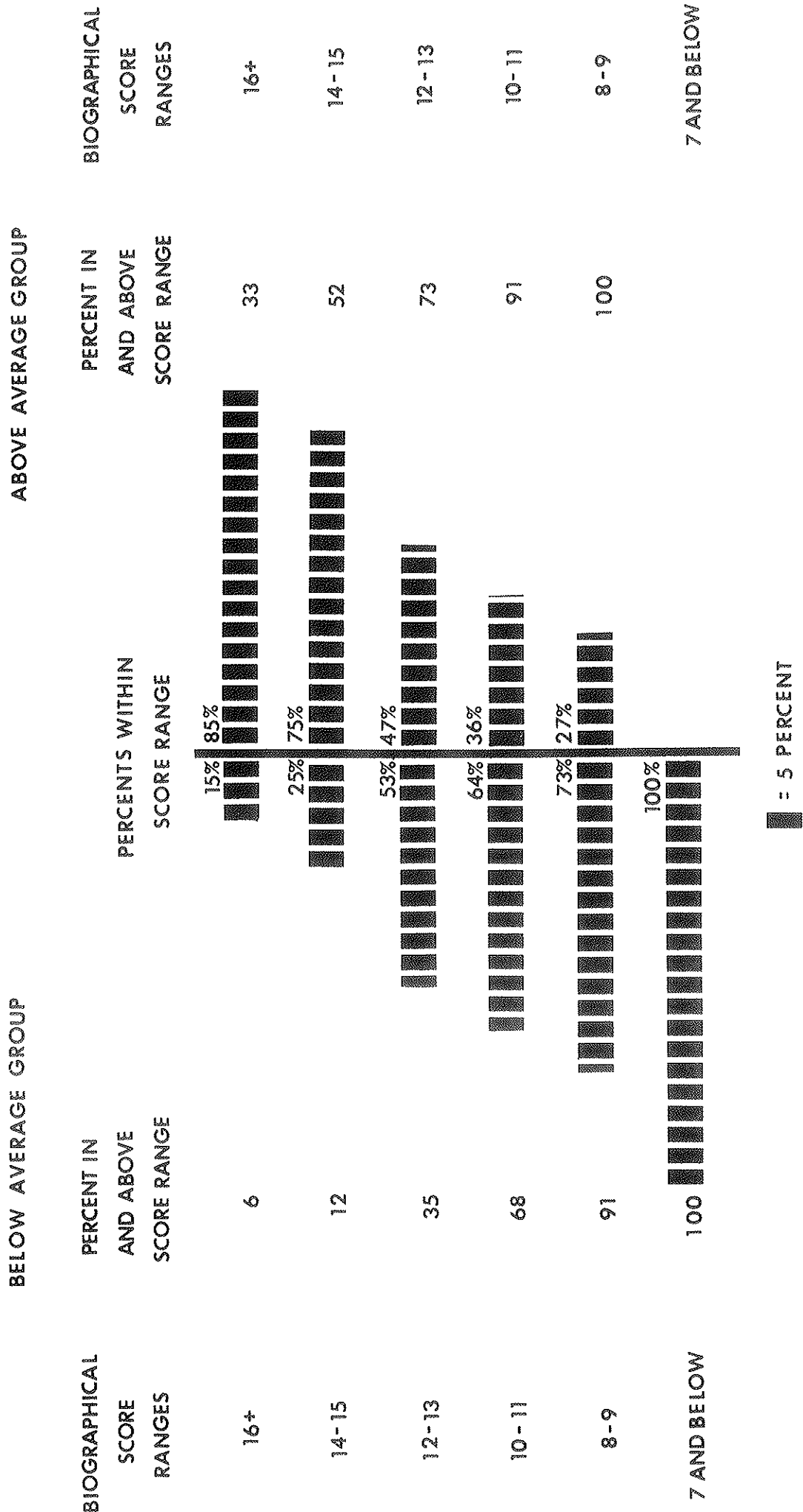
1. PREPARE 200-ITEM QUESTIONNAIRE COVERING EDUCATION, MILITARY EXPERIENCE, PREVIOUS JOBS, HOBBIES, INTERESTS, MOTIVATIONS, ACHIEVEMENTS, ETC. (SEE SAMPLE QUESTIONS).
2. ESTABLISH STATEMENT OF EXPECTED JOB PERFORMANCE THROUGH VISITS TO SEVERAL ELECTRIC COOPERATIVES TO DISCUSS AND OBSERVE.
3. DEVELOP PERFORMANCE EVALUATION MATERIALS, RATING FORMS, AND INSTRUCTIONS FOR USE IN AN ASSESSMENT OF INDIVIDUALS COMPLETING BIOGRAPHICAL QUESTIONNAIRE.
4. MAIL 300 BIOGRAPHICAL QUESTIONNAIRES AND PERFORMANCE EVALUATION MATERIALS, PROVIDING FOR CONFIDENTIAL RETURN OF MATERIALS TO OUR OFFICE.
5. STATISTICALLY ANALYZE 200 BIOGRAPHICAL QUESTIONNAIRES (A 67 PERCENT SAMPLE) TO IDENTIFY QUESTIONS WHICH DIFFERENTIATE ABOVE FROM BELOW AVERAGE PERFORMANCE AS DEFINED IN STEPS 2, 3, AND 4.
6. APPLY SCORING KEY FOR VALID QUESTIONS TO 100 QUESTIONNAIRES (A 33 PERCENT SAMPLE) HELD APART FOR TREATMENT AS IF COMPOSED OF MANAGERIAL JOB APPLICANTS.
7. PREPARE FINAL FORM BIOGRAPHICAL QUESTIONNAIRE AND STUDY REPORT, SCORING ROUTINES AND KEYS, REFERENCE TABLES, AND A "COOK-BOOKED" ADMINISTRATIVE AND INTERPRETIVE MANUAL PRESENTED SO AS TO MAKE THE PROGRAM ADMINISTERABLE AT THE LOCAL LEVEL WITHOUT ASSISTANCE FROM OUR ORGANIZATION.
8. PERSONALLY PRESENT A FINAL REPORT TO THE CONSULTATION GROUP AND/OR NRECA MANAGEMENT.

## SAMPLE BIOGRAPHICAL QUESTIONS

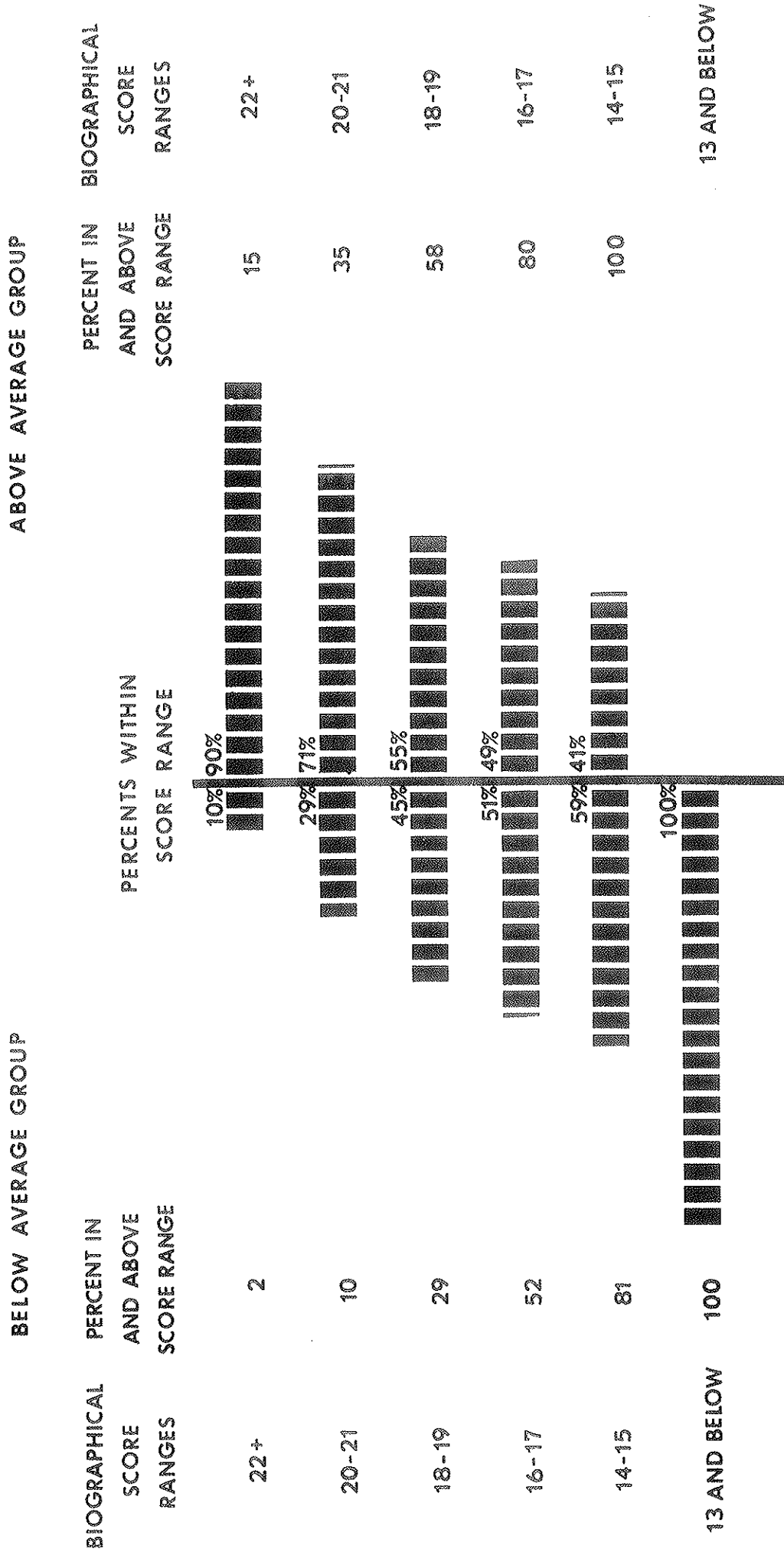
1. What is your present marital status?
  - a. \_\_\_ Single.
  - b. \_\_\_ Married, no children.
  - c. \_\_\_ Married, one or more children.
  - d. \_\_\_ Widowed.
  - e. \_\_\_ Separated.
  - f. \_\_\_ Divorced.
  
2. How many times have you been married?
  - a. \_\_\_ None.
  - b. \_\_\_ 1
  - c. \_\_\_ 2
  - d. \_\_\_ 3 or more times.
  
3. How many persons (not including yourself) are dependent upon you for their financial support?
  - a. \_\_\_ None.
  - b. \_\_\_ 1
  - c. \_\_\_ 2
  - d. \_\_\_ 3
  - e. \_\_\_ 4
  - f. \_\_\_ 5
  - g. \_\_\_ 6
  - h. \_\_\_ 7 or more.
  
4. Does your wife work outside your home?
  - a. \_\_\_ Not married.
  - b. \_\_\_ No
  - c. \_\_\_ Yes, part-time.
  - d. \_\_\_ Yes, full-time.
  
5. How many full-time jobs have you had in the past five years?
  - a. \_\_\_ 1
  - b. \_\_\_ 2
  - c. \_\_\_ 3
  - d. \_\_\_ 4
  - e. \_\_\_ 5 or more.
  
6. What was the longest time you spent on a job prior to joining your present employer?
  - a. \_\_\_ I had no previous job.
  - b. \_\_\_ 1 year
  - c. \_\_\_ 2 years
  - d. \_\_\_ 3 years
  - e. \_\_\_ 4 years
  - f. \_\_\_ 5 or more years.
  
7. Prior to joining your present employer had you ever had two jobs at the same time where at least one of the jobs was full-time?
  - a. \_\_\_ Yes
  - b. \_\_\_ No
  
8. To how many civic organizations (i.e. school boards, PTA, etc.), clubs, or social organizations do you now belong? (Any group which has regular meetings and a definite membership)
  - a. \_\_\_ 0
  - b. \_\_\_ 1
  - c. \_\_\_ 2
  - d. \_\_\_ 3
  - e. \_\_\_ 4
  - f. \_\_\_ 5 or more.
  
9. To which magazines do you now subscribe?
  - a. \_\_\_ Time, Newsweek or U.S. News.
  - b. \_\_\_ Life or Look.
  - c. \_\_\_ Scientific American or National Geographic.
  - d. \_\_\_ Harpers or Atlantic.
  - e. \_\_\_ Home craft magazines, such as Popular Mechanics, Popular Science, etc.
  - f. \_\_\_ Sport and outdoor magazines.
  - g. \_\_\_ Esquire or Playboy.
  - h. \_\_\_ Hobby or special interest magazines (hi-fi, photography, etc.).
  - i. \_\_\_ None of the above.

10. In how many different cities, towns, or townships have you lived in the past ten years?
- \_\_\_ 1
  - \_\_\_ 2
  - \_\_\_ 3
  - \_\_\_ 4
  - \_\_\_ 5
  - \_\_\_ 6
  - \_\_\_ 7
  - \_\_\_ 8
  - \_\_\_ 9 or more.
11. In what size city would you prefer to live?
- \_\_\_ Rural or country.
  - \_\_\_ 5,000 or less.
  - \_\_\_ 5,000 to 50,000.
  - \_\_\_ 50,000 to 200,000.
  - \_\_\_ 200,000 or more.
12. What type of book do you prefer to read for pleasure?
- \_\_\_ Novels.
  - \_\_\_ Mystery stories.
  - \_\_\_ Literary classics.
  - \_\_\_ Technical books.
  - \_\_\_ Biography and history.
  - \_\_\_ Humor.
  - \_\_\_ Don't read books.
13. What was the primary reason for your selection of your first full-time "permanent job?"
- \_\_\_ Good pay.
  - \_\_\_ Good opportunity for advancement.
  - \_\_\_ Because it was challenging.
  - \_\_\_ Because it was in your field.
  - \_\_\_ As a stop gap because you needed a job.
  - \_\_\_ As a temporary job which would be good training.
14. Prior to joining this company on which one of the following remunerative types of work had you spent the most time?
- \_\_\_ Unskilled labor.
  - \_\_\_ Skilled labor.
  - \_\_\_ Clerical or office work.
  - \_\_\_ Door-to-door sales.
  - \_\_\_ Personal service (valet, housecleaning, maid, etc.).
  - \_\_\_ Policeman, fireman, etc.
  - \_\_\_ Camp counsellor, YMCA, or YWCA work.
  - \_\_\_ Social worker.
  - \_\_\_ Librarian.
  - \_\_\_ Factory, shop or farm manager.
  - \_\_\_ Surveying, drafting, etc.
  - \_\_\_ Farm worker or farmer.
  - \_\_\_ Auto or real estate selling, etc.
  - \_\_\_ Reporter or advertising man.
  - \_\_\_ Semi-professional (pharmacist, photographer, etc.).
  - \_\_\_ Research worker.
  - \_\_\_ Small business owner or operator.
  - \_\_\_ Executive or administrator (large business or industry).
  - \_\_\_ Teacher or instructor.
  - \_\_\_ None of these.

# BIOGRAPHICAL SCORES AND PERFORMANCE RATINGS FOR 67 DISTRICT MANAGERS

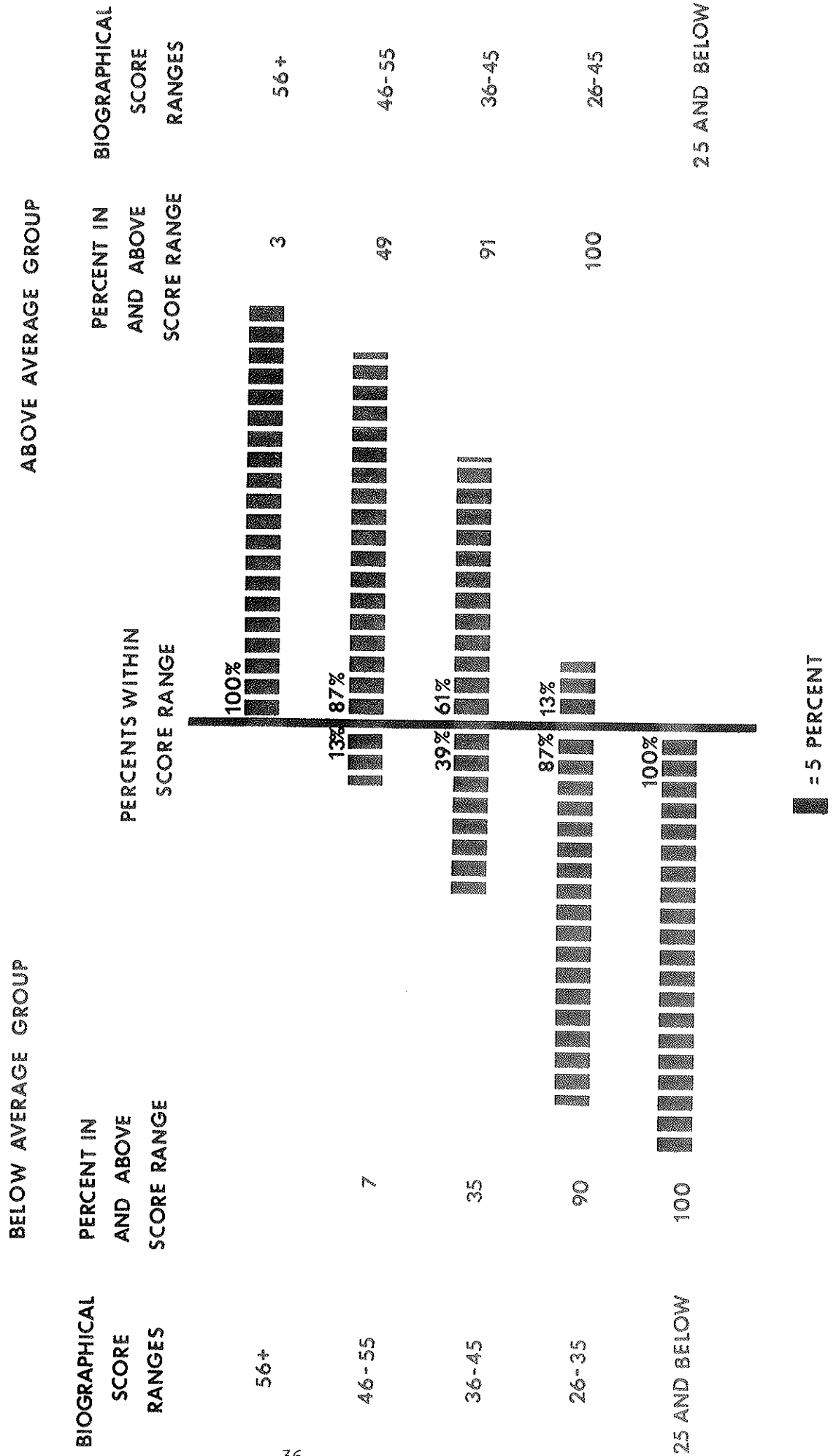


# BIOGRAPHICAL SCORES AND PERFORMANCE RATINGS FOR 122 ENGINEERING SALES MANAGERS



■ = 5 PERCENT

# BIOGRAPHICAL SCORES AND PERFORMANCE RATINGS FOR 64 ASSOCIATION EXECUTIVES



MINUTES OF THE 1970 MANAGEMENT CONSULTATION

Jim Golden, Program Chairman, opened the 1970 meeting at 9:00 a.m. on May 12, 1970. The meeting was held at the Buccanneer Motor Lodge, Jekyll Island, Georgia. Attendance report indicated 42 people in attendance, representing 24 consumer rural electric systems and the National Rural Electric Cooperative Association. Persons present identified themselves and the systems they represented. The objectives of the consultation were then reviewed.

Mr. Golden introduced the program and recognized the persons appearing on the program. These included Dr. Nathan Baily, Dean of the School of Business, American University, Washington, D. C.; Robert Kabat, Manager, Management Services Department, National Rural Electric Cooperative Association, Washington, D. C.; and Dr. W. D. Buel, Consulting Industrial Psychologist, Tampa, Florida.

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The business session was held at 9:00 a.m. on May 14, 1970 with chairman Charles Boulson presiding.

Treasurer Everett Bristol presented his report which was accepted by the group. (See copy attached.)

The Chairman expressed appreciation to Mr. Bristol for his fine work as treasurer of the consultation. He also expressed appreciation to the Secretary Barbara Deverick for the work she had done in preparing the 1969 consultation proceedings. He appointed Barbara Deverick as secretary for the coming year and requested that she prepare proceedings of the 1970 consultation.

The group approved by voice vote the 1969 consultation proceedings as printed.

Mr. Boulson thanked Program Chairman Golden and his committee for the work done in planning and presenting the fine program. He also thanked Charles Overman and his system personnel for serving as hosts to the group.

Cecil Viverette, Chairman of the Membership Committee, reported that he contacted each member of his committee and each system attending the 1969 consultation for their recommendations of systems which would be eligible to participate in the consultation. Invitations were sent to all systems nominated, together with objectives of the consultation group and criteria for membership. Mr. Viverette urged all consultation members to provide information to the membership committee concerning eligible systems which would be interested in participating in the consultation program.

Bob Weathers, gave the report of the nominating committee, in the absence of committee chairman, Virgil Herriott, who had to leave the meeting before time for the report. The following nominations were reported by the committee:

- For Vice-Chairman - Charles Overman
- For Three-Year Member of Program Committee - Clyde Hukills
- For One-Year Member of Program Committee - Millard Goff (filling unexpired term of  
Glen Newton)
- For member of Nominating Committee - Norwood Speight
- For member of Membership Committee - Olaf Sandvick

The motion was made and seconded that the group approve the report of the Nominating Committee

and the Secretary was directed to cast a unanimous ballot for the election of those nominated. The motion was adopted.

The selection of a site for the 1971 consultation and setting the date for the 1971 consultation was the next item of business. Sites proposed were Phoenix, Arizona; Anchorage, Alaska; Kimberling City, Missouri. By vote of the majority of the systems represented at the consultation, the site of Anchorage, Alaska was chosen. The dates chosen for the meeting were May 11, 12, 13, 1971 and the location in Anchorage. Chugach Electric, Larry "Bud" Schultz, was designated host system.

A motion was made and seconded that if the Consultation Chairman and Program Chairman found, for any reason, that the meeting could not be held in Anchorage that the second site, Kimberling City, Missouri, be considered. The motion was defeated.

Chairman Boulson led the group in a discussion of Objectives and the Future of the Consultation. He was assisted by Jim Golden. A review of the consultation programs from 1968 through 1969 was given. (See attached copy.)

The Chairman presented the following statement to the group. The Management Consultation Group has never been static, it has changed over the years from the standpoint of its goals and degree of sophistication. First, it was a group that desired to share experience, to see how the other fellow was doing things. Second, the concept of staff assistant was presented and over a period of time became a fixture in our operations. Third, we realized the need for a better definition of purposes and we set down a list of viewpoints and objectives and developed criteria for participation, including a dues schedule. More recently we have begun to bring in outside expertise on a more formal basis, such as the last two programs. One area we have neglected, however, except for the work Barbara Deverick is doing, is research, and the need for RESEARCH is stated as one of our prime objectives. Perhaps it is time now to begin more programs of research on a more regularized basis. Bob Kabat has suggested this to us at this meeting. Changing methods and procedures and a recognition of the need for research all indicate that now is the time to begin a formal program of research. Therefore, as your Chairman, I am proposing to appoint a Research Committee, selected from this group, composed of two managers and two staff assistants and charged with the responsibility to (a) Review the Statement of Viewpoints and Objectives and suggest changes, if necessary. (b) Explore and identify those areas in which research could have significant influence on modern management principles as they apply to our organization. (c) Suggest ways in which such research could be carried out or accomplished, including indicated costs, and (d) Report their findings in depth at the next consultation and make recommendation for further action for full group approval.

Mr. Boulson concluded his statement by stating that he would like a consensus from the group concerning his proposal. The group agreed that such a committee should be appointed and set to work.

Some comments made in discussing the proposal that a research committee be appointed, brought out ideas that the consultation group should be concerned with What is New in getting things done through people, that the group should be guided by its objectives, that primary emphasis should be given to determining what research is needed and get assistance in carrying out the research.

The discussion indicated that full support was given the chairman in establishing a Research Committee. The Chairman indicated he would proceed to appoint the committee.

There being no further business, the Chairman declared the meeting adjourned.

Barbara Deverick  
Secretary



MANAGEMENT CONSULTATION

Financial Statement as of May 1, 1970

Balance Forward - 5/2/69 \$4,942.35

Expenses

Antlers Plaza Hotel, Colo. Spgs., Coffee Service & Rental	\$ 81.98
Blue Ridge EMC - Materials for Proceedings	<u>47.63</u>
	\$129.61

Receipts

Additional 1969 Dues paid after 5/2/69 (See attached list)	700.00
1970 Dues paid to date (See attached list)	2,400.00
Interest from S & L Deposit	<u>199.37</u>
	Total Receipts 8,241.72
	Less Expenses <u>- 129.61</u>
	Balance 5/1/70 \$8,112.11

NOTE: (\$5,000 is deposited with Routt County Federal Savings & Loan Association and balance is in Routt County National Bank, checking account # 4048.)

Everett C. Bristol, Treasurer

1969 Dues paid after 5/2/69

Slope Electric Cooperative, Inc.	100.00
The Sedgwick County Electric Cooperative Association, Inc.	100.00
San Isabel Electric Association, Inc.	100.00
Sho-Me Power Corporation	100.00
Chugach Electric Association, Inc.	100.00
Lake Region Coop Electrical Association	100.00
South Plains Electric Cooperative, Inc.	100.00
	<hr/>
	\$ 700.00

1970 Dues paid as of 5/1/70

White River Valley Electric Cooperative	100.00
Sioux Valley Empire Electric Association	100.00
Mecklenburg Electric Cooperative	100.00
Shenandoah Valley Electric Cooperative	100.00
Blue Ridge E. M. C.	100.00
Aiken Electric Cooperative	100.00
North Arkansas Electric Cooperative	100.00
Douglas County E. M. C.	100.00
Cass County Electric Cooperative	100.00
Kay Electric Cooperative	100.00
West Central Electric Cooperative	100.00
Wheatbelt P.P.D.	100.00
Morgan County R.E.A.	100.00
Yampa Valley Electric Association, Inc.	100.00
Cornhusker P.P.D.	100.00
Ozarks Electric Cooperative	100.00
KEM Electric Cooperative	100.00
Boone Electric Cooperative	100.00
Cumberland E.M.C.	100.00
Jackson Purchase R.E.C.	100.00
Morgan County R.E.M.C.	100.00
Cotton Electric Cooperative	100.00
Horry Electric Cooperative	100.00
Chugach Electric Association	100.00
	<hr/>
	\$2,400.00

## MANAGEMENT CONSULTATIONS

1958 (May 22-23) - Kansas City, Mo. - Chairmen - None

Exchange ideas and experiences

1958 (October 13) - Kansas City, Mo. - Chairmen - Virgil Herriott  
Jim Kiley

1959 (March 9-10) - Kansas City, Mo. - Chairmen - Ed Gaither  
Jim Golden

### Subjects:

#### Managers

What is a staff assistant and what responsibilities should he have?

Are staff assistants necessary and if so, what size organization can justify having one?

How can we best select, develop and start a staff assistant to function?

Area of Board relationships

Clarify objectives of Consultation

#### Staff Assistants

What are some of the difficulties confronting the staff specialist in getting his functions properly defined and clearly understood?

What are some of the difficulties encountered in establishing and maintaining the proper relationship between staff specialist and manager?

What are some of the difficulties encountered in establishing and maintaining the proper relationship between staff specialist and department heads?

What difficulties have been encountered by staff specialist in getting the necessary time and freedom of action to do an effective job on management development and research and to implement necessary programs?

1959 (October 1-2) - Kansas City, Mo. - Chairmen - C. E. Boulson  
Warren Johnson

### Subjects:

#### Managers

Conceptual Thought

Exercises in Conceptual Thinking

Conceptual Thinking Applied to the Art of Management

Research Needed

#### Staff Assistants

Actual Experiences as a Staff Assistant

Measuring Productivity

Board Relationships of the Staff Assistant

Research Methods

Annual Work Programs

The Broad Responsibilities of Staff Assistants

Management Consultations

1960 - Kansas City, Kansas

- Chairmen - Willard Grager  
Lawrence Moderow

Due to accidents  
Chairmen duties performed by - Virgil Herriott  
Jim Kiley

Subjects:

Managers

Annual Work Programs  
The Philosophy and Practice of Delegations

Staff Assistants

Developing Annual Work Programs and Budgets  
Improving Your Performance Appraisal Program

1961 - Kansas City, Kansas

- Chairmen - Wesley Jackson  
James Garey

Subjects:

Managers

Definition of Objectives and Purpose of Consultation  
Visual Aids for Board Presentations  
Keeping the Board Informed  
Board-Manager Relations  
Automatic Data Processing as a Management Tool  
New Ideas in Management

Staff Assistants

Establishing Standards of Performance  
New Approaches to Performance Appraisal  
The Responsibility Accounting Concept  
Automatic Data Processing as a Management Tool

1962 - Kansas City, Kansas

- Chairmen - John Dolinger  
Nevin McKennon

Subjects:

Managers

Changing Concepts in Organization Structure  
Managing Your Improvement Program  
Advising and Assisting Board  
Supervision of Staff  
Why Have Performance Standards?  
Types of Performance Standards  
How Performance Standards are Developed  
Standards for Board Members

Management Consultations

1962 (continued)

Staff Assistants

Changing Concepts in Organization Structure  
Performance Standards  
Standards for Board Members  
Work Plans  
Budgets  
Controls  
Staff Assistant's Role as Member of Management Team

1963 - Kansas City, Kansas

- Chairmen - Cecil Viverette  
Barbara Deverick

Subjects:

Managers and Staff Assistants

Viewpoints and Philosophies in Regard to Role of Cooperatives in the  
Community  
Discussion of What the Basic Philosophy of Our Business Organization Should Be  
What Constitutes Management Development in Our Consumer-Owned Electric System  
Use of Visual Aids in Employee Development  
Methods and Programs - The Results Approach  
Manager's Role in Management - Employee Development  
Planning Function  
Innovations in Controls and Responsibility Accounting  
Ideas for Improved Performance Appraisal and Development Counseling

1964 - Kansas City, Kansas

- Chairmen - Jim Golden  
Ev Bristol

Subjects:

Managers and Staff Assistants

Annual Work Planning  
ECIDV  
Wage and Salary Planning and Administration  
Long Range Planning  
Staff Services  
Selection of Key Employees

1965 - (May 5-7) - Chicago, Illinois

- Chairmen - Jack Cochran  
Bob Weathers

Subjects:

ECIVD - 1985 - Tom Nelson  
Benefits of Employee Attitude Survey - John Zards  
Planning Personal Time - Tom Nelson  
Rural Electrification - 1985 - Norman Clapp  
Legal Atmosphere - 1985 - William C. Wise

Management Consultations

1966 - (May 9-10) - St. Louis, Mo. - Chairmen - Bill Beverage  
Doug Leary

Subjects:

The Future of the Consultation - Bill Beverage  
"Behavioral Science Research Findings with Particular Relevance to the  
Effective Functioning of Groups in a Rural Electric System" - Leadership  
Resources, Inc.  
"Performance Appraisals and Performance Standards" - Leadership Resources, Inc.

1967 - (May 9-11) - New Orleans, La. - Chairmen - Willard Grager  
Lawrence Moderow

Subjects:

Managerial Ethics - Our Changing Sense of Values - Tom Nelson  
Measuring Performance - James Sullivan  
Position Descriptions from Results Angle - Barbara Deverick and Cecil Viverette  
What We Know About Leadership - Dr. Fred Fiener  
Manager's Problem Areas Observed During Research with Rural Electricians -  
David Weaver

1968 - (May 7-9) - Memphis, Tenn. - Chairmen - Willard Grager

Subjects:

Who Are Your Motivated Workers - Dr. Scott Myers  
Managing the Unsatisfactory Performer - Dr. Lawrence Steinmetz  
New Aspects of Performance Appraisal - Group  
"Where Are Replacement Managers Coming From?" - Group

1969 - (May 6-8) - Colorado Spgs., Colo. - Chairmen - Willard Grager

Subjects:

Rural Improvement - Cooperatives Potential - N. P. Ralston  
What Role Can Rural Electricians Play in Community Betterment Programs? - Ev Bristol  
What Role Can Rural Electricians Play in Industrial Development - Dwight Neill  
Goals and Objectives, As Adopted by the National Rural Electric Membership -  
Management Program Development and Opportunities for Cooperation -  
James A. Golden

OFFICERS AND COMMITTEES FOR  
1971 CONSULTATION

Chairman - C. E. Boulson	Term Expires in 1972
Vice Chairman - Charles Overman	Term Expires in 1973
Treasurer - Everett Bristol	Term Expires in 1971
Secretary - Barbara Deverick	Appointed by Chairman

PROGRAM

Chairman - Jim Golden	Term Expires in 1972
Millard Goff	Term Expires in 1971
Lawrence Moderow	Term Expires in 1972
Clyde Hukills	Term Expires in 1973

NOMINATING

Chairman - Virgil Herriott	Term Expires in 1971
Bob Weathers	Term Expires in 1972
Jack McEnerney	Term Expires in 1972
Norwood Speight	Term Expires in 1973

MEMBERSHIP

Chairman - Cecil E. Viverette	Term Expires in 1971
Charlie Overman	Term Expires in 1972
Olaf Sandvick	Term Expires in 1973
Bruce Bosworth	Term Expires in 1971

- A. All committee members and officers - elected for a 3-year term.
- B. Chairmen of each standing committee are named by the Nominating Committee and serve for 3 years when elected.

