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RESUME OF QUALIFICATIONS

KAREN SORLIE RUSSO

1500 7th Street, #12-M
Sacramento, CA 95814
Phone: 446-2037

Education:

Graduate 1964	UNIVERSITY OF NORTH DAKOTA Degree: B.A. Major: Political Science	Minor: Economics
Attended	UNIVERSITY OF NORTH DAKOTA LAW SCHOOL for two years	
Graduated 1968	UNIVERSITY OF SAN FRANCISCO (law school) J.D.	

Activities: (University of North Dakota)

Intramural Debate Squad - won several State and Regional Awards; named "Debater of the Year" - 1963 Alpha Phi Social Sorority Mademoiselle's Magazine College Editor Member, State Executive Committee of the North Dakota Republican Party State Central Committee Secretary of Law Class, 1963-65 Student Bar Chairman of the Pre-Law Clubs "Grey Gowns" - Scholastic Honorary.

Activities: (University of San Francisco)

Worked with Federal Public Defenders Office as part of USF Student Defender program.

Organizations:

California Bar Association, 1968 to present.
North Dakota Bar Association, 1968 to present.
American Bar Association, 1968 to present.
American Trial Lawyers Association, 1968 to present.

Experience:

April 1968 to September 1968	Research Director, Republican State Central Committee of California
September 1968 to present	Administrative Assistant to State Senator George Deukmejian

Personal:

Age: 26 Height: 5'7" Weight: 105 lbs. Married, 1 Child

References will be furnished upon request.

PERSONAL DATA:

Bernard M. Schur

101 Blade Way, Walnut Creek, California 94595 (415) 934-2982

Married, 2 children, height: 5'-11", weight: 190 lbs., Brown hair, Hazel eyes,

Age 33 - Date of Birth: May 7, 1937

Social Security No.: 395 32 5349

Current Employment: Director, Job Development and Training, Contra Costa County Department of Education, 75 Santa Barbara Road, Pleasant Hill, California 94520 (415) 228-3000, Ext. 230

EDUCATIONAL BACKGROUND:

B.S. Degree, University of Wisconsin-Madison 1961 - Areas of study:

1. Communications-Speech
2. Public Administration-Political Science

Master of Public Administration (MPA), Golden Gate College, San Francisco
1967 - Graduate Suma Cum Laude

Master of Business Administration (MBA), Golden Gate College, San Francisco
1969 - Graduate Suma Cum Laude

University of California, Berkeley - 1969 to Present
California Community College Teaching Credential - Life
Administrative Credential - Pending
Vocational Educational Credential - Part-time Life
Pupil Personnel Credential - Pending

Licensed Marriage, Family and Child Counselor 1970.

WORK EXPERIENCE:

1969 Contra Costa County Department of Education, Pleasant Hill
Director, Job Development and Training Project-Program
Administrator, Counselor

1966 - 1969 Contra Costa County OEO, Martinez, California -
EOP-Spec.-II-Program Development Supervisor-Create,
Design, write, budget and implement new programs for poor.

1964 - 1965 Multnomah County Food Stamp Program, Portland, Oregon -
Recorder-Assistant Supervisor, - Record and report cash
and stamp disbursements.

1962 - 1964 Campus Development Co., Portland, Oregon -
President and General Manager of College Business
Development Company.

1954 - 1954 U.S. Army, Ft. Lewis, Washington
Public Information Spec. - Radio, TV, Press and Instructor

Feb. Sept.
1961 - 1961 Madison Inn Hotel, Madison, Wisconsin -
Assistant Manager, Promotions, Sales, Desk Clerk
Supervision

May Sept.
1960 - 1960 Hawthorne Youth Camp, Hawthorne, California -
Resident Director of Summer Youth Camp

1955 - 1961 Various employment while in College

OTHER ACTIVITIES:

College Teaching:

Professor - School of Business and Public Administration,
Golden Gate College, Courses in Budgeting, Finance
and Administration - Graduate School.

Napa College - Designed and administered curriculum in Management
and Supervision, taught all courses in curriculum.

Contra College Community College District (DVC and CCC)
Instructor in Community Development and Public Services Administration.

President County Homeowners Association

Various community projects.
Citizens for Jobs Committee.

U.S. Army, Ft. Lewis, Washington
Public Information Spec. - Radio, TV, Press and Instructor

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President County Homeowners Association

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Citizens for Jobs Committee.

BRICE UNION TAYLOR

R E S U M E

BIRTHPLACE: Born in Seattle, Washington, on July 4, 1902

EDUCATION: Colman Grade School - Seattle Wash.
Franklin High School - Seattle, Wash.
University of Southern California - Education B.S. & M.S.
Guadalupe College, Segua, Texas - D.D.

EXPERIENCE: 1968 - 1970, Project Director, Kedren Community Health Center,
Project Head Start
1945 - 1968, Los Angeles Board of Education, Served at Jefferson High School in the following capacities - Coach of Football, Basketball, Tennis, Baseball & Gymnastics, Assistant to the Vice Principal, Coordinator of Youth Services, Continuation Education Teacher, School-Community Coordinator & Corrective Physical Education Teacher.
1942 - 1945, Director of Physical Education, Booker T. Washington High School, New Orleans, La.
1941 - 1942, Director of Information for Service Men, New Orleans, La.
1939 - 1941, President of Guadalupe College, Seguin, Texas
1936 - 1939, Director of Athletics & Teacher at Samuel Houston College, Austin, Texas.
1933 - 1936, Director of Athletics & Teacher, Bishop College, Dallas, Texas
1928 - 1932, Southern University, Baton Rouge, La. Director of Athletics & Teacher.
1927 - 1928, Director of Athletics & Teacher, Claflin University, Orangeburg, S.C.

OUTSTANDING
ACHIEVEMENTS:

U.S.C.'S FIRST ALL AMERICAN FOOTBALL PLAYER, 1925. Member of Committee of 3 to write guidelines for Community Coordinator for Los Angeles City Schools. Set up first program of Corrective Physical Education for Negroes in New Orleans High Schools, with emphasis on the physically handicapped child. Organized the Gulf Coast Intercollegiate and Inter-scholastic Association composed of 40 schools.
Played a key roll in formulating the Los Angeles Youth Services Program. Advisor to Los Angeles Teaching Guide for Corrective Physical Education. Formerly the Assistant Minister at Lincoln Congregational Church. Presently Associate Minister at First African Methodist Episcopal Church of Los Angeles.
U.S.C. Alumni Service Award, 1970
Vice Chairman of SAVE OUR SPORTS of Los Angeles/Hollywood
1968 Recipient of Golden Apple Award for Teacher-of-the-Year in Los Angeles, California.

FAMILY: Married to Dora J. Taylor, They have 3 children - Henry J., son - Dora Ada, Daughter & Rev. Cyrus J. Taylor, son.

ORGANIZATIONS:
Omega Phi Psi - Phi Delta Kappa - Phi Tau Omega - Commissioner, Boy Scouts - N.A.A.C.P. - URBAN LEAGUE, Member Board of Directors 28th Street Y.M.C.A. N.C.A.A. - Metropolitan Branch Y.M.C.A.

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ORGANIZATIONS: (Cont)

Interracial Committee S.P.A.A.A.U. - Metropolitan Branch of Basic Assumption Comm. - L.A. Coaches Assoc. & International Gymnastic Federation Trojan Club - Trojan Spikers - U.S.C. Alumni Association Mayor's Advisory Committee - Advisory Comm. Special Ed. - District Attorney's "Cool Head" Program Committee, International Federation Gymnastic Coaches & Officials - Avalon-Carver Board of Directors, Interdenominational Alliance - Teen Post Advisory Council.

REFERENCES:

Dr. William Johnston, 450 North Grand Ave., Los Angeles, California
Assistant Supt. Adult Education
Mr. Isaac McClelland, 450 North Grand Ave., Los Angeles, California
Associate Supt. L. A. Schools.
Councilman Gilbert Lindsay, 4264 South Central Ave., Los Angeles, California. Councilman
Mrs. Grace Kyle, 1823 Michigan Ave., Santa Monica, California
Head Start
Mr. Kenneth Hawkins, 2204 Crenshaw Blvd., Los Angeles, California
Teacher
Mr. Norman Hodges, 628 Corlett Ave., Compton, California 90220
President of Green Power
Mr. Henri O'Bryant, 2730 Westshire Drive, Hollywood, California
Fire Commissioner

RESUME - RICHARD W. THIES

PERSONAL

13326 Cheltenham Drive
Sherman Oaks, California 91403
(213) 789-2669

Age, 32 - Height, 6'2" - Weight, 190
Married, two children
Health - Excellent

EXPERIENCE

Executive

February '68 to present:

VIVA (Voices in Vital America); 1211 Westwood Boulevard,
Los Angeles, California 90024; (213) 477-7962

Currently Executive Director of VIVA an educational and charitable students organization established in 1967 as a non-partisan, non-political tax exempt corporation. VIVA's objective is to involve students in constructive activities thereby strengthening an awareness of their responsibilities in a free society.

Being responsible for virtually the full scope of the organizations activity, I report directly to the Board of Directors.

With a staff of two and between 3 to 30 volunteers, I directed the development of VIVA from an idea to the national organization it is today.

Along with routine administrative duties, I

- provided leadership training and development to the several hundred student contacts established on campuses nationwide, resulting in the formation of over 75 active chapters;
- designed a comprehensive organization kit which enables students to organize chapters quickly and efficiently. The kit contains specific organizational guidelines, a membership drive packet, a press relations packet, a debate kit and a variety of recruitment aids;
- conceived and wrote a variety of on-campus campaigns such as "Operation Ombudsman" and "Educational Imperatives" in furtherance of VIVA's objective. These campaigns were packaged in kit form for easy implementation by chapters;
- handled virtually all press arrangements for the national office which generated national television, radio and wire service coverage complimented by similar local and regional coverage for innumerable VIVA sponsored campus events;
- put together a speakers bureau consisting of articulate student leaders versed on the subject of student unrest. Secured hundreds of engagements resulting in broad exposure for the organization;

- generated partial funding for the organization through personal contacts, fund raising luncheons and presentations to business and professional groups.

Administrative Assistant

Sept., '67 to Jan., '68:

Grant Oil Tool Co.: 1901 Avenue of the Stars, Suite 1130,
Los Angeles, California 90067; (213) 277-3444

Served as Administrative Assistant to Henry Salvatori, President. While handling much routine correspondence, I reviewed and evaluated requests for financial aid from various educational and activists organizations. Further, I represented him at events and meetings which he was unable to attend and served as liaison to several of his philanthropic activities. I also read documents, reports, speeches and journals relating to his scope of interest and submitted verbal or written briefs.

Sales Management

Nov., '61 to Aug., '67:

Mobilcolor Productions, Inc.: 1005 Second Ave., New York,
New York 10022; (212) TE 8-0087

Was Western Sales Director for this New York based electronic display firm. The Company designed, manufactured and marketed electronically controlled patterned lighting devices used in a wide variety of fields from retail promotions and television spectacles to industrial show production and World Fair pavilion lighting.

I was involved in virtually all phases of corporate activity, specifically responsible for market research, sales promotion and direct sales: reported directly to the president, Bernard Block. Called on clients throughout the Western states making initial presentations, coordinating preliminary design, negotiating final contracts and acting as maintenance contact. The job demanded strict attention to detail and timing as well as requiring constant public relations.

Sales

Nov., '60 to Nov., '61:

Grant Webb & Co: 509 Madison Avenue, New York, New York
10022; (212) MU 8-7550

Served as Account Executive for this medium sized radio representation firm, preparing sales presentations for some 75 local radio stations throughout the U.S. Called on time buyers, account executives and account groups in most of the major N.Y. advertising agencies on behalf of these stations.

EDUCATION

1959 graduate of U.C.L.A. with a BS degree in Business Administration: specialization - Industrial Relations. Completed Lumbleau Real Estate School, 1964: completed Evelyn Wood Reading Dynamics Course, 1966. I have continued my education with night school courses coupled with an intensive home reading program.

SPECIAL TALENTS

Public speaking and debating - fields of interest are student unrest, Capitalism and Southeast Asia.

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SPECIAL TALENTS

Public speaking and debating - fields of interest are student unrest, Capitalism and Southeast Asia.

NAME: Kenneth M. Trigger

ADDRESS: 430 Ross Way
Sacramento, California, 95825

Telephone: 483-8041

EDUCATION: High School, College, Law School (2
years - McGeorge College of Law).

EXPERIENCE:

11-66 to present

Employer:

Legal Aid Society of Sacramento
(Yolo) County
3287 5th Avenue
Sacramento, California

Position:

Chief Investigator

Duties:

Investigate civil and criminal matters as dictated by the needs of a large law office operation. Conduct background and factual investigation as required by each case; locate witnesses; obtain written and/or sworn statements as required; prepare evidentiary and exhibit material for trial purposes (photographs, diagrams, models, etc.); testify as to direct evidence; make jury checks, etc.; audit accounts when necessary.

Duties also encompass supervising the investigative staff and serving 12 attorneys.

EXPERIENCE:

6-63 to 10-66

Employer:

Allstate Insurance Company
2829 Watt Avenue
Sacramento, California

Position:

Senior adjuster and negotiator

Duties:

Investigate liability claims and make determination as to legal liability of clients. This includes investigation as to the background and movements of the people involved, personal habits, past histories, etc., to determine liability under tort, and quite often under contractual aspects. Assist in the preparation of material for trial defense and/or negotiate with plaintiff's counsel if case is to be settled. Evaluate damages. Review preliminary investigation and outline and complete further investigation, when necessary. Train junior adjusters.

10-56 to 6-63

Self-employed as independent insurance adjuster in Grass Valley, Marysville, and Sacramento.

Duties:

Investigated and negotiated settlement of claims (fire, inland marine, aviation, marine, and casualty), for various insurance companies, as an independent contractor. Made determination as to legal liability of clients, when necessary. Assisted in preparation of material for trial defense, or

Re: Kenneth M. Trigger

3.

EXPERIENCE: (Continued)

negotiated settlement with plaintiff's counsel if case was to be settled. Trained assistant adjusters and supervised office staff.

1-53 to 9-56

Employer:

Toplis & Harding
3440 Wilshire Boulevard
Los Angeles, California

Position:

Senior adjuster and negotiator

Duties:

Performed same duties as outlined above, in addition to training and supervising junior adjusters.

6-51 to 1-53

Employers:

W. E. Severance & Co.
3440 Wilshire Boulevard
Los Angeles, California

Position:

Senior adjuster and assistant manager.

Duties:

Performed virtually same duties as outlined above, in addition to acting as assistant to president and as corporate secretary. Supervised entire staff in absence of president.

3-50 to 5-51

Employer:

Phoenix Assurance Co. of London
Los Angeles, California

Re: Kenneth M. Trigger

4.

EXPERIENCE: (Continued)

Position:

Fire and Marine Claims Manager

Duties:

Supervised all of the fire, inland marine and special risk claims department.

9-47 to 3-50

Employer:

Nelson Gary, Insurance Adjuster
Los Angeles, California

Position:

Staff Adjuster

Duties:

Investigated fire, inland marine, aviation, marine and casualty claims, made determination of liability, evaluated damages and negotiated settlements.

1946-1947

Employer:

Western Adjustment & Inspection Co.
Michigan City, Indiana

Position:

Resident adjuster

Duties:

Performed duties as outlined above, in addition to managing office and supervising staff.

GLENN R. WHITELEY
10138 LA ALEGRIA DRIVE, RANCHO CORDOVA

BIRTH DATE: 10-9-31

FAMILY: Wife-Eleanor, 4 sons-ages 9 to 14.

EDUCATION: N.B.H.S., New Bedford, Mass.

SERVICE: USN- 1949 to 1953; helicopter crewman-maintained
electronic systems.

EMPLOYMENT RECORD

1954 - 1960	F.L. Moseley Co., Pasadena, Calif. Started as technician. Advanced to design engineer.
1960 - 1962	Auto Data Co., San Diego, Calif. One man electro-mechanical design dept.
1962 - 1963	American Astrophysics, Monrovia, Calif. Design engineer.
1963 - 1965	Hewlett/Packard, Moseley Div., Pasadena, Calif. Engineering aide.
1965 - 1967	Servo Products Company, 540 W. Woodbury Rd., Altadena, Calif. Design Engineer.
1967 - 1968	Kennedy Co., 540 W. Woodbury Rd., Altadena, Calif. Designer
1968 - 1970	Raytheon, Wayland, Mass. Designer

GENERAL

Employed in electronics/instrumentation field for 15 years
in various design engineering positions with responsibility
for conception and design of laboratory instrumentation.
Additional duties have included sales promotion (trade shows,
liason with and support of sales reps) and publications
(writing of ad copy, sales brochures, operating manuals)
while with Servo Products, Auto Data and F.L. Moseley Co.

NOTE: For F.L. MOSELEY CO., Hew/Pac, Servo Products Co.,
contact Francis L. Moseley, owner of Servo and member of the
board of H/P. Can be contacted at the Servo address in
Altadena.

ACTIVITIES: Flying, soaring. Commercial Aiplane license (SEL) and Glider rating. International Silver C Soaring Certificate. Member of Experimental Aircraft Assoc. Former member Soaring Society of America.

APPLICANT is a life-long Republican who has been increasingly dissatisfied with the limited opportunities available in engineering to make what seems to him a meaningful contribution to the solution of society's problems and feels that government in general and the Republican Party in particular offer the best hope for more satisfying work.

subjects necessarily tends to make them ineffective during the first several months, even under ideal conditions of proper motivation, good instruction, etc. Given the actual situation and SEOO philosophy which places so much emphasis on the evaluation aspects of field work, it is doubtful whether the Community Program Analysts can ever be as helpful to the grantees as OEO Instruction 7501-1 envisions.

c. Recommendation: More emphasis should be placed on the hiring of professionals based on actual experience and personal involvement in OEO-related activities. The special conditions pertaining to accessions, e.g., approval of candidate by selection panels on which regional and national OEO are represented (as specified, for example, in the STAP grants) should be scrupulously observed.

5. PERSONNEL MANAGEMENT:

a. Recruitment, Selection, and Hiring:

(1) Facts:

(a) Clerical personnel fall under State Civil Service requirements. Positions must be advertised, and applicants are selected from those adjudged best qualified by the State Personnel Board.

(b) Professional personnel are, upon selection by SEOO, appointed officially by the DHRD Personnel Section (Management Services Division).

(2) Recommendation: None.

b. Pay, Fringe Benefits, Leave, Career Development and Civil Rights:

(1) Facts: Clerical personnel, being under State Civil Service, enjoy automatic benefits and protection. The same provisions are applied to the exempt Civil Service professionals except job protection. A quasi-career development or career ladder is provided by the opportunity to advance if a vacancy occurs from Community Program Analyst to Technical Assistance Specialist or supervisor, or transfer into a STAP slot.

(2) Recommendation: The possibility of a career ladder plan for professionals should be considered.

c. Training:

(1) Facts: Both Sawicki and Hawkins acknowledged the need for additional training, particularly for field personnel, and

Page 15 -- Paragraph 2 FINDINGS (Charge)

. . . Given the actual situation and SEOO philosophy which places so much emphasis on the evaluation aspects of field work, it is doubtful whether the Community Program Analysts can ever be as helpful to the grantees as OEO Instruction 7501-1 envisions.

RESPONSE:

SEOO does put emphasis on field work because you have to know the problem before you can solve it. Consequently, much of the preliminary work done by SEOO has been to determine what the problems are. During the course of field visits by SEOO representatives CAA personnel had expressed great concern over some of the problems confronting them. At this point SEOO representatives attempt to find out why the programs are not working, what the problems are and in conjunction with CAA personnel work to rectify the situation. *(See attachments)*

DEPARTMENT OF HUMAN RESOURCES DEVELOPMENT

OFFICE OF ECONOMIC OPPORTUNITY

CAPITOL MALL

SACRAMENTO, CALIFORNIA 95814

Southern California Office of Economic Opportunity

1314 Cravens Avenue

Torrance, California 90501



October 9, 1970

C
O
P
Y

Mrs. Lois Richard
Project Director
Pasadena Area Head Start
1367 North Fair Oaks Avenue
Pasadena, California

Dear Lois:

The review form which came down from the State Director of OEO requires some information which I failed to ascertain during our last visit. Please send me as soon as possible your home address, the name and home address of the Deputy Project Director, your Fiscal Officer, and other key staff personnel. Also the names and addresses of your advisory board chairman and the names only of your other board directors.

Also please include the date your Head Start program was formed and your budget history; that is the sources of your funds, i.e., OEO, HEW, State, etc. I also need the number of professionals involved in your program and the number of non professionals. Finally, the answer to the following question: "Have any political subdivisions elected to opt out of past programs?" (Green Amendment). Thanks in advance for sending this information at your earliest convenience.

Most sincerely,

Richard Thies

Page 15 - Para. 2

Bob Hawkins

March 31, 1971

PCHNO

Gil Archuletta

On Tuesday, March 30, Herb Brown, Dick Thies, and I met with Regional OEO Representatives Cal Williams and Joan Lenihan to discuss the Pasadena CAP.

Miss Lenihan told us that PCHNO's letter of credit had been re-stored on a month-to-month basis in the maximum amount of \$42,000 per month. She indicated that the CAP had satisfactorily answered all of the 14 charges Regional had brought against them. She further stated that most of the 14 points were the result of defective internal systems. She said that PCHNO would be in good shape if they retain their new systems. At one point, she told us that some of the points were a result of imprudent actions on the part of the Executive Director and that he is now acting more cautiously.

Regional has presented PCHNO with a special condition for Program Year E, which requires them to reduce their board membership from 40 to 21. They must submit their plan for reduction by June 1, 1971.

We indicated to Miss Lenihan and Mr. Williams that we wished to aid the CAP in many ways, but were hampered by their refusal to cooperate with our CPA. They agreed it was a bad situation, and in turn, have set up a meeting with SEOO, WROEO, the Executive Director of PCHNO, and Board Chairman of PCHNO, for Monday, April 5. At this meeting we hope to gain full access to the CAP, its personnel and records.

We will make an indepth evaluation of PCHNO, and either clean it up or shut it down.

GA:js

Page 15
Paragraph 2

Page 15

Charge:

"b. Findings: (2)....Given the actual situation and SEOO philosophy which places so much emphasis on the evaluation aspects of field work, it is doubtful whether the Community Program Analysts can ever be as helpful to the grantees as OEO Instruction 7501-1 envisions."

Response:

Comments concerning the SEOO philosophy and the lack of effectiveness of Community Program Analysts in the long term, here again we are faced with the closed-mindedness of our federal evaluators. First, the federal evaluators failed to specify just what the SEOO philosophy is. In a nut shell, our philosophy is that OEO monies should go toward producing independent behavior on the part of those individuals receiving monies from OEO. It is obvious to date that this has not transpired; and our evaluations attempt to demonstrate how these programs have failed to help the truly needy in our society. The underlying federal assumption here is that there is some efficacy in throwing good money down a worn out philosophical hole.

Page 15--c. Recommendation (Charge)

"The special conditions pertaining to accessions, e.g. approval of candidate by selection panels on which regional and national OEO are represented (as specified, for example, in the STAP grants) should be scrupulously observed."

Response:

California SEOO admits that it did not adhere to the selection panel choosing STAP personnel; however, it should be emphasized that, even with a STAP panel, cases of nepotism and favoritism have shown up. An example is that the Management Specialist chosen by the panel happened to be a personal friend of one of the panel members and did not possess a degree in management. Furthermore, the gathering of a panel and the process of recruitment, selection, and hiring is extremely time-consuming and expensive; again, it is possible that the work program may suffer as a result of this long process.

Page 15--5 b. Pay, Fringe Benefits, etc. (Charge)

"The possibility of a career ladder plan for professionals should be considered."

Response:

The recommendation calls for the establishment of a career ladder plan. A glance at the present and proposed table of organization shows that there are methods by which people can be promoted as vacancies occur, and, in fact, this has already taken place. Another management observation is that, with the small staff of professionals that we have, vacancies do not occur frequently. Funding guidelines further restrict career ladders that have numerical compensation commensurate with added responsibility and authority.

stated interest in participating in Federal training conferences, seminars, etc.

(2) Recommendation: The Region should provide the SEOO with a schedule of training activities and encourage SEOO participation. The SEOO should take fullest possible advantage of Federal and other training opportunities.

d. Supervision and Evaluation:

(1) Facts: Clerical personnel in the office work under direct supervision. State Civil Service annual evaluation requirements appear to be fulfilled. Field personnel have definite assignments (see Attachments). An itinerary of field trips is filed with the supervisor for one month in advance (this procedure was initiated in February, 1971). Trip reports are on a new form (since January) made for each trip; however, they are held by the Community Program Analyst or the Technical Assistance Specialist until the end of the month when an activity report is prepared (see Attachments). Field personnel are on the "honor" system; two work out of their homes. There is no formal evaluation of professionals. They are judged by the results of their labor.

(2) Findings: The SEOO has made an effort to provide better and clearer instructions to field personnel by designing check lists for evaluation (see attachments) of Legal Services and CAA compliance. They have also designed a form entitled "Information Package Review" which the Community Program Analysts are responsible for completing and updating. This form is kept in the grant folder (see Attachments). Some monthly reports of field personnel for January were made available to the evaluation team. Some field reports were considered CONFIDENTIAL in order to protect information sources and were not, therefore, made available to the evaluation team. Due to high workloads during December and January, reports for this period have not yet been prepared. A single report, covering December, January, and February is now under preparation.

(3) Recommendation: Field personnel should be required to file trip reports with their supervisors immediately upon returning from a field trip rather than at the end of the month. These reports should indicate the actual time spent and the exact subjects discussed with each grantee or person visited.

6. CIVIL RIGHTS:

a. Facts:

(1) Of the professional staff (those exempt from Civil Service) 23 are listed as Caucasian, one as Eurasian, two as Mexican-American, and three as Negro. Of the staff covered by Civil Service

Page 16 -- Paragraph 5 d. (2) FINDINGS (Charge)

. . . Some monthly reports of field personnel for January were made available to the evaluation team. . . . Due to high workloads during December and January, reports for this period have not yet been prepared. A single report, covering December, January, and February is now under preparation.

RESPONSE:

Southern California Administrative Assistant requires a weekly report of activity from all field personnel. In addition, regular weekly staff meetings are held so that all field personnel is aware of the activities of the entire staff and can work in concert to solve any problems. The results of these staff meetings and weekly reports are then relayed to Sacramento on a regular basis. Field representatives generally concern themselves more with on-site assistance rather than the formality of preparing reports.

Page 16

Charge:

"d. Supervision and Evaluation (1) facts:....Field personnel are on the "honor" system; two work out of their homes. There is no formal evaluation of professionals. They are judged by the results of their labor."

Response:

The federal field representatives are stating that we should not trust our professionals because of an honor system. I fail to understand the complaint. Furthermore, just because there is no formal, static, bureaucratic checklist on which we evaluate our professionals, this does not mean that our professionals are not evaluated. Our professionals are constantly being evaluated by their supervisors as to the quality of their work. It is the feeling of the State Office of Economic Opportunity that the personal interaction of supervisor and professional brings about the best results in the long run. Personnel policies, based upon personal knowledge and experience are much better than the formalistic and static requirements of some so-called "objective" evaluation dreamed up by bureaucrats and administered to other bureaucrats. Again the idiocy of our federal evaluators is demonstrated when they state, concerning professionals "they are judged by the results of their labor;" our only response to this state is, how else does one judge a person, except by the results of their labor?

Charge:

"d. Supervision and evaluation (2) findings...Some monthly reports of field personnel for January were made available to the evaluation team....Due to high workloads during December and January, reports for this period have not yet been prepared. A single report, covering December, January, and February is now under preparation."

Response:

The report for December, January, and February is now completed.

Page 16 Charge:

"d. Supervision and evaluation (3) recommendation: Field personnel should be required to file trip reports with their supervisors immediately upon returning from a field trip rather than at the end of the month. These reports should indicate the actual time spent and the exact subjects discussed with each grantee or person visited. "

Response:

It is impractical, given the size of our office to assume that our field people should be required to file reports after each trip. Again the bureaucratic mind is at work, degrading the competence of the professional.

13 are listed as Caucasian, and one as Negro. Therefore, the total staff breakdown is:

Caucasians	36
Negroes	4
Mexican-American	2
Eurasian	1

(2) No affirmative action plan as required by CAP Form 11 has been implemented.

b. Recommendation: An affirmative action plan in accordance with CAP Form 11 should be implemented. Attention should be given to whether the minority composition of the staff fairly reflects the proportions of minority persons in the State of California and, particularly, among the poverty population of the State.

7. ACCOUNTING AND FINANCE:

a. Facts: These activities are handled by the Fiscal Section of the Management Services Division. They prepare the monthly CAP 15s for Mr. Uhler's signature.

b. Findings: Internal controls have been set up. Leonard Downs keeps tabs on expenditures and Miss Pearson checks travel vouchers, mileage claims, etc., against the activity reports of the individual concerned. Downs checks CAP 15s as prepared by DHRD against his records, and initials them before sending them to the SEOO Director for signature. Downs is also preparing the budget for the next year. In absence of a funding guidance he is using the present budget as a starting point.

c. Recommendation: None.

8. FILES:

a. Facts: Files inherited from the previous SEOO staff (pre-July 1, 1970) were very inadequate. Subject headings were used for filing, and there was no cross-referencing. Downs requested help from General Services, who trained his file clerk to set up a duo-decimal system. Most of the files have been integrated into the new system. There is a chronological reading file maintained by the SEOO's secretary for all correspondence emanating from the entire office. There is a complete set of OEO instructions and CAP directives which was recently received from OEO Headquarters. There is a library of publications, which is in a state of disarray.

b. Recommendation: Memoranda for record should be added to correspondence in the chronological reading file to explain the nature of correspondence. The library should be inventoried, obsolete material discarded, and obsolete files retired or destroyed.

Page 17--6 a. CIVIL RIGHTS--Facts (Charge)

"No affirmative action plan as required by CAP Form 11 has been implemented."

Response:

It was stated to the evaluators emphatically that the grant, although earmarked for SEOO, is made directly to the State of California and that, while the earmarking exists, funds are intermingled with the General Fund of the entire State. It is assumed that an affirmative action plan is being followed by all of the employees of the entire State of California, and it is almost an impossibility to divorce a small section, such as the SEOO, from the rest of the plan in force throughout the State of California.

Page 17--6 b. CIVIL RIGHTS--Recommendation (Charge)

"An affirmative action plan in accordance with CAP Form 11 should be implemented. Attention should be given to whether the minority composition of the staff fairly reflects the proportions of minority persons in the State of California and, particularly, among the poverty population of the State."

Response:

The ethnic breakdown of the SEOO does not show a wide variation from the proportion of minority persons within the State, and this was reiterated to the evaluators. For example, out of 43 positions, 4 persons are from the Black community, representing roughly 10 percent--almost equal to the Black population in the State.

Page 17--8. a. FILES--Facts (Charge)

"..There is a complete set of OEO instructions and CAP directives which was recently received from OEO Headquarters. There is a library of publications, which is in a state of disarray."

RESPONSE:

One of the file clerk's first duties after beginning employment with SEOO in November 1970, was to assemble, from various sources (other than OEO Headquarters) a set of CAP memos and OEO instructions which include SFR instructions, staff notices, etc. We are not aware of a complete set of instructions received from OEO Headquarters. These books are maintained on a current basis by the file clerk. The implication that there was no work involved in securing the above-mentioned directives is demoralizing, to say the least.

The publications for distribution are labelled and were displayed in an orderly fashion in the library at the time of the evaluation, having been labelled and shelved the first week of December, 1970, by the secretary to the Staff Assistant for Planning.

Page 17--8.b. FILES--Recommendations (Charge)

"Memoranda for record should be added to correspondence in the chronological reading file to explain the nature of correspondence. The library should be inventoried, obsolete material discarded, and obsolete files retired or destroyed."

RESPONSE:

The library is in the process of being inventoried and should be completed by the middle of May. Our library is used as reference material, therefore the old material will not be discarded. Suggestions for organizing the library have been taken from the publication, "Technical Libraries, Their Organization and Management", issued by Special Libraries Association in New York.

Obsolete files have been packed and are in the process of being sent to the State Records Center. This involves working week-ends due to other duties required during regular working hours.

9. OTHER FILES:

a. Personnel Folders:

(1) Facts:

(a) The SEOO maintains a convenience file of Personnel Folders; the official files are kept by the DHRD Personnel Section and State Personnel Board (computerized file of all State employees).

(b) The convenience files are not uniform in content; some contain job applications or resumes; most hold transcripts of driving records and social security information on previous employment (used to check salary statements). Regarding driving records, the SEOO has requested pertinent State offices (State Police and Motor Vehicle Bureau) to notify the office of all driving violations committed by SEOO personnel. None of the six files chosen at random contained a position description.

(2) Recommendation: All personnel files should contain resumes of qualifications as well as position description for which employee is hired. Folders should also contain name, address, and telephone number of persons to be notified in case of emergency, and home telephone numbers should be prominently displayed for emergency contact of employee. Further, CAP Memo 23A requires that biographies of key personnel be submitted to the Regional Office within seven days after appointment.

b. Telephone Message File:

(1) Facts: Telephone message pads are provided with carbon, so that messages are automatically made out in duplicate, the original going to the addressee and the copy remaining with the secretary.

(2) Recommendation: None.

c. Newspaper Clipping File:

(1) Facts: A contract is let through State procurement channels for a newspaper clipping service. Clippings are received daily; office personnel fasten them to letter-sized backings, and file them in a Pendaflex-type hanging file. The file is used for background information on individual grantees or subjects of OEO concern and to keep SEOO personnel advised of latest developments. Cost of clipping service varies with volume, but averages \$250.00 per month according to the Budget Officer. In an attempt to lower costs, requirements for Headstart information were eliminated last December; increased publicity on CRLA and Oakland during the last few months have kept costs at relatively the same levels despite dropping the Headstart requirement. Downs hopes, however, that now