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The Exchange Newsletter

Institute for Public Service (IPS)

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Senior Law Enforcement
Leaders attend LEIC Training

Professional Development
Training Opportunities Available
for Employees

UT Implements New
Independent Contract
Fiscal Policy

EXCHANGE

Creative, Trusted and Valued Solutions for Tennessee

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IPS Finance Consultants Lead Class at Government Finance Officers Association

UT Municipal Technical Advisory Service (MTAS) Finance and Accounting Consultant Ralph Cross and UT County Technical Assistance Service (CTAS) County Government Consultant Doug Bodary taught a class titled, "Top 10 Debt Issuance and Management Fails" for the Tennessee Government Finance Officers Association (TGFOA) at its recent conference.

Cross is on the TGFOA board representing the Tennessee Municipal League and Bodary is on the board representing Tennessee County Services Association (TCSA).

The course covered some common bad practices in public debt issues and management. Guidance was given to class attendees

on how to avoid such pitfalls through best practices from the Government Finance Officers Association of the United States and Canada (GFOA). The class received very high marks from both municipal and county attendees and numerous requests for a repeat performance in the class evaluation forms. The conference was a sellout with more than 300 in attendance. ✕



DOUG BODARY



RALPH CROSS



Legislative Interns Receive an Overview of IPS

MORE THAN 60 Tennessee legislative interns were in the audience as Institute for Public Service Assistant Vice Presidents Chuck Shoopman and Steve Thompson, Naifeh Center for Effective Leadership Program Manager Gary Peevely and Training Specialist Stefani Mundy oriented them to IPS and its agencies. ▶▶▶

◀ **Stefani Mundy (front left) leads a trivia game for legislative interns.**

(continued)

Shoopman kicked off the program with a warm welcome, engaging the college students in learning about IPS. Peevely discussed the trainings and leadership education solutions offered through the Naifeh Center, giving the interns real-life examples of application.

Thompson talked to the students about the IPS statewide public internship program, and was surrounded by potential applicants following his announcement. Mundy wrapped up the session with an interactive IPS trivia game, engaging the legislative interns in a friendly competition. ✕

Senior Law Enforcement Leaders attend LEIC Training

THE UT LAW Enforcement Innovation Center recently held a Command Level Leadership training course in Nashville.

Senior leadership from 17 local police agencies, two university police departments and nine sheriff's offices attended the training. Key instructors included Captain Frank Armstrong from the Boston Police Department, who discussed Critical Incident Response utilizing the Boston Marathon Bombing as the lead example; Dr. Kimberly Miller, who presented on Strength-Based Leadership; and Captain Penny Phelps from the Monroe, Fla. Sheriff's Office who covered generational Issues.

Other topics included budgeting, strategic planning, identifying high risk employees and media relations. ✕

LEIC's Command Level Leadership Class. ▶



This article is reprinted from the Municipal E-News

Never Stop Learning

By Jim Thomas
Executive Director, MTAS

**“LIVE AS IF YOU WERE TO DIE TOMORROW.
LEARN AS IF YOU WERE TO LIVE FOREVER.”**

While I hope none of us die tomorrow and can safely assume no one lives forever, Mahatma Gandhi's quote about learning strikes a chord with me and hopefully everybody reading this.

What I learned last week is helping me this week. What I learn this week should (with emphasis on should) help me next week. And I had better learn something next week to help me get to the following weeks. You get the picture - success and survival are critically dependent on learning. Stop learning and you... well, you stop.

Learning is important at the UT Municipal Technical Advisory Service (MTAS). We expect our fellow staff members to learn so that the knowledge pool of the organization becomes continuously deeper. You, our customers, the 345 towns and cities across Tennessee,





expect us to be on top of each and every new issue that you face every day, and we work hard throughout the year to meet that expectation by continuously learning. In MTAS, we give a name to our learning activities...professional development. We learn in the classroom, at the conferences we attend, in the topical seminars we participate in and in our own personal life experiences.

As MTAS employees, each of us has a target to complete at least 32 hours of professional development each calendar year, and those professional development learning activities must be relevant to our mission of providing consulting, training and information to our customers. I am thrilled to let you know that every (repeat "every") MTAS employee exceeded the minimum requirement for professional development in 2013 and some exceeded it by two or three times.

Your city government organization shares many similarities with MTAS, so I'm sure that

allowing your employees opportunities to expand their knowledge is important to you. Some see professional development as a waste of time because when faced with an endless stream of deadlines, it can certainly not get the important consideration it deserves. But, the return on the professional development investment, in time and money, is rich. It might even make meeting all those deadlines a little easier. ✕



Professional Development Training Opportunities Available for Employees

NUMEROUS TRAINING COURSES are offered through The University of Tennessee to help employees attain their HR0128 professional development requirements. Employees should review their professional development plans with their supervisors.

Visit the Employee & Organizational Development website <http://humanresources.tennessee.edu/eod/> to view and register for classes. E-learning classes are available through Skillsoft including more than 300 classes available to UT employees. EOD also offers several certification programs in communications, customer service, introduction to supervision and Leading at UT. Most of the certification programs are 32 hours in length and some are available online. UT also offers special event classes

such as the Professional Development Conference for Women in April, the Office Professionals seminar in October, a Fast Track Supervisory seminar, Star Achievement, and an Administrative Professionals retreat in the fall. EOD also offers computer classes in the Microsoft Suites package.

Classes in computer skills are available through the Office of Information Technology. These classes are both available in a classroom setting or online. <https://oit.utk.edu/Pages/default.aspx>

Employees may also take IRIS training classes by registering through EOD, but these classes must be taken in Knoxville. ✕

UT Implements New Independent Contract Fiscal Policy

UT HAS ADOPTED a new fiscal policy regarding hiring individuals to perform services such as training and consulting. The new policy is designed to assist employees in determining whether the individual is an employee or an independent contractor. The guidance is based upon compliance with Federal and State employment law.

Term employees or special appointment employees (SAE's) will now be called Temporary Employees. An employee is considered to be temporary if he or she works sporadically or on an as-needed basis. UT defines this as an employee who is not paid consecutively in every pay period for an entire year. Hiring paperwork must be completed initially when the employee is hired, but will no longer be required to be renewed on an annual basis.

Anytime that UT hires an individual to perform services, the determination of employee or independent contractor must be made before any work is performed. This is largely determined by (1) the relationship with the individual, and (2) the extent of control over the individual's

work. If the individual is an employee of UT, has been an employee during the last six months, or is expected to be hired as an employee soon, then they should be treated as an employee instead of an independent contractor.

Guest speakers are specifically identified as independent contractors in the fiscal policy. Instructors or trainers may be independent contractors if they control the course materials and if they provide the same or similar services to other entities or to the general public. For example, if IPS hires an individual to deliver our curriculum, then he or she must be considered an employee because of the extensive control over the work. But, if IPS hires someone to teach a class and only specifies a topic, then that is much less control and the person may be considered an independent contractor.

Consultants are likely to be independent contractors if they (1) provide similar services to other entities or to the general public, (2) provide their own supplies and materials to perform the work, (3) rely on their own expertise rather than receiving specific instructions from the agency

regarding performance of the work, and (4) determine their own work schedule to accomplish the work.

The new policy has a useful questionnaire that walks the user through this determination process by answering a series of questions. If it is completed and the indication is that the individual should be an independent contractor, then the employee must sign the form and ask the independent contractor to sign the form. It should then be scanned and attached to IRIS transaction ZXX1 to request that the Treasurer's Office create a vendor. The Treasurer's Office will not set up the vendor without reviewing and approving this questionnaire.

As a reminder, if IPS expects the dollar amount of the services to exceed \$5,000, then it must be put out for bid or a Non-Competitive Justification completed and then a contract. If the amount is expected to be less than \$5,000, then UT does not require a written agreement with the vendor. The details regarding the work and remuneration may be agreed upon via email. ✕

IPS Inclement Weather Policy

Effective Date: Monday, February 17, 2014

GENERALLY, INCLEMENT WEATHER does not warrant the closing of IPS offices. Conditions caused by inclement weather (snow, flooding, tornados, etc.) require each employee to make a personal judgment regarding his or her ability to travel safely to and from work. Supervisors should allow employees to use annual leave if the employee feels it is not safe to travel. Employees who make the effort and who report within a reasonable period

(no more than two hours) should not be required to use leave for that absence. Employees should notify their supervisor of their ability to travel.

Occasionally, extraordinary emergency conditions caused by extreme inclement weather may warrant the closing of some IPS offices. When such conditions are thought to exist, the offices will follow the following guidelines on closure:

- IPS Chattanooga – follows the UT Chattanooga closing (offices are on the campus)
- IPS Cookeville – follows the Putnam County Courthouse closing as announced by the County Mayor
- IPS Jackson – follows the Ag Experiment Station closing
- IPS Johnson City – follows the Washington County Courthouse closing as announced by the County Mayor

THE UT INSTITUTE FOR PUBLIC SERVICE recently participated in UT Day on the Hill. All of the UT campuses and institutes participate in the annual event held at Legislative Plaza.

IPS Vice President Dr. Mary Jinks talks with Paul Armas, legislative intern for the Naifeh Center for Effective Leadership.



Tennessee Comptroller of the Treasury Justin P. Wilson greets students from the UT Knoxville campus.



- IPS Knoxville – follows the UT Knoxville closing (offices are on the campus)
- IPS Martin – follows the UT Martin closing (offices are on the campus)
- IPS Memphis – follows the Shelby County Courthouse closing as announced by the County Mayor
- IPS Nashville – follows the Nashville/Davidson County Courthouse closing as announced by the Metro Mayor
- IPS Oak Ridge – follows the Anderson County Courthouse closing as announced by the County Mayor
- Other work assignments – follows county courthouse closing as announced by the county mayor for the county where the employee is based.*

* If your home is your official duty station, you will not be eligible for administrative closing hours for inclement weather.

This article is reprinted from the Municipal E-News

Workforce Planning Moves to Top of Priority List Again

By Bonnie Jones
MTAS Human Resources Consultant

IN 2008, I WAS FINISHING my graduate project on municipal succession planning and boy, were we ready to plan, plan, plan! After all, we knew that by 2010 (which seemed so far away), 10,000 Americans would be turning 65 each day. This trend is calculated to last for 19 years until the youngest baby boomers reach 65. We knew that most city governments were looking at 40-60 percent of their workforce entering retirement eligibility. But the economy slowed that retirement rate down. Suddenly, folks retiring in mass numbers were falling off the radar. They were still at work. Many still are. Well, welcome to 2014 – where some reports show we are picking up where we left off.

As Governing.com reported in December 2013, the vastly anticipated wave of government workers that was once delayed by the recession is now picking back up. This means cities and towns need to get back on track with their workforce development plans. The article reports that for one state agency in Connecticut, by June, 40 percent of its correctional officers will be eligible to retire. This “silver tsunami” does not discriminate based on department or skill level – it is being seen at all levels of government. When you are talking about men and women who have been working in an environment that requires experience, the years count. You simply can’t replace the knowledge, skills, and



(continued)

organizational knowledge that you may lose. Even if the most critical positions are filled, there are still millions of jobs that cannot yet be filled by a millennial. This is commonly known as the generational gap.

With the large number of employees becoming retirement-eligible, however, the current situation won't last long. Many state and local governments expect retirement paperwork to begin piling up soon, and some report signs that the tide is already rising. Public administration experts express concern that governments are ill-prepared. If they aren't ready, agencies risk permanently losing decades of expertise, eroding their ability to serve the public for years to come.

Similarly, information technology departments in some jurisdictions are gearing up for high turnover. The Cook County (Ill.) Human Resources Bureau reports 40 percent of county technology staff will be retirement-eligible by 2017. Many of the systems these employees support will soon be outdated, so the county has stepped up its recruitment efforts as it plans technology upgrades.

At the opposite end of the spectrum, senior-level public managers tend to hang onto their jobs longer. A survey conducted by the International City/County Management Association (ICMA) found that 63.3 percent of city and county managers and other appointed chief local officials were older than 50. Complicating this situation further is the fact that baby boomers around the same age often make up a department's entire management staff, creating the possibility of many decimating departures within a relatively short time.

So, put your workforce planning hat back on. Run some numbers and talk with department heads. Remember, it is not ethical to ask employees when they are retiring. However, collecting data on who is eligible to retire is certainly something your organization should be doing. ✕



kudos

To: Sharon Rollins, MTAS

I work at Rockwood Water Sewer and Gas and have called Bonnie Jones several times for help. I just wanted to take the time to let you know she is always so prompt with returning my emails and has been extremely helpful to me and RWSG. I am new here and would have been lost with or without her expertise in many areas. Thank you and your staff for all your help!

*Angie Isham
Rockwood Water, Sewer, and Gas*

To: Jim Thomas, MTAS

I am writing this letter on behalf of the Roane Alliance Search Committee.

During our recent search to find a replacement for the Roane Alliance President/CEO, Warren Nevad from your office participated in screening the resumes and led interviews of the individuals from which we finally chose a premier candidate. It was apparent that Warren's leadership abilities and interpersonal skills brought out the best exchange with the candidates so that we could make a final decision.

*Sharon Templeton
Energy Solutions/Roane Alliance
Board Chair
Rutherford County Attorney*

To: Steve Austin, CTAS

Thank you for all of your help in providing information on probably cause determinations.

*Nicholas Christiansen
Rutherford County Attorney*

To: LEIC

I graduated from the UT National Forensic Academy in November 2013. On November 19 I was called out to assist with an officer-involved shooting at a nearby college campus. My recent training in bloodstain pattern analysis and shooting reconstruction were invaluable to me. I was confident that I knew what to do and how to go about doing it. Instead of being offended I was able to educate others regarding officer involved shootings, most notable by telling an unnamed, but very important officer on scene, that the officer who was attacked and defended himself was the victim, not the person who viciously assaulted the young officer. I was able to accurately sketch and measure the scene using my new knowledge, and then I used Autosketch to draw a representation of the scene of the shooting. The officer did a great job of defending himself, and since by day two no one had told him so, I did, rather loudly and in front of my command staff.

A few days later I was called out to investigate shots fired into an occupied residence. I knew from shooting reconstruction that there was not much I could do with the bullet defects through the glass except determine directionality, despite the insistent ramblings of the detective on scene, who wanted to re-enact the entire crime for me, which he had solved, by the way, as he waited for me to “finally” show up. I had learned to do my own thing at the NFA, to “Do what I do”, so when the detective continued to follow me around wanting to help hold the flashlight, hold the door open, hold the evidence up (yes, really), I was more prepared than I used to be to just laugh, stay calm, and continue to take my sweet time doing a good job of documentation rather than being hurried along by people with no clue about crime scene processing. Before I attended the NFA a detective like this would have thrown me for a loop, and I would have likely botched the job trying to be fast and make everyone happy.

On November 25, I was called out to assist with a suicide by arson. I was able to use my advanced photography skills documenting a burned out vehicle as I assisted the fire marshal with a search warrant of the vehicle, looking for evidence of accelerants (which we found). Thanks to the NFA, I knew that the thing next to the car was a human bone and not a piece of the car, and it was collected instead of overlooked. Before the NFA I am positive I would not have been successful in taking pictures of the inside of a burned beyond recognition vehicle.

We don't normally have this much excitement in Lynchburg, it has been a whirlwind few months. I have gone out on several other calls since being home, but those were the first three, and they ran back to back. Those three calls made it clear to me that not only had I learned a lot in the NFA, but I had grown as an investigator. The two years of experience in crime scene I had before the NFA were like baby steps compared to my three months in Tennessee.

*Penelope Doss, NFA Session 34 Graduate
Lynchburg, Va.*

announcements

RECRUITMENTS

LEIC – Coordinator, Nashville

PROMOTIONS

Martha Kelley, CIS to Consultant II

NEW HIRES

Michael Codega, CIS Solutions Consultant III, Memphis

Brittney Davis, CTAS Administrative Intern, Nashville

Rob Kirk, CIS Solution Consultant, in Middle Tennessee

STATE SERVICE LONGEVITY

Beth Phillips, CIS	34 years
Marie Vesser, CIS	33 years
Walter Idol, CIS	29 years
Kurt Frederick, MTAS	29 years
Alan Major, MTAS	28 years
Pat Hardy, MTAS	25 years
Gail White, CO	20 years
Robin Roberts, CTAS	19 years
Sherri Cooper-Duru, CIS	17 years
Tammy Gage, CIS	14 years
David Angerer, MTAS	13 years
Keith Groves, CIS	9 years
Mike Galey, CTAS	3 years

calendar

CIS

- March 4 8-Hour Emergency Response Refresher Knoxville
- March 4 Tennessee Environmental Regulatory Overview (Broadcast), Nashville
- March 4 Tennessee Environmental Regulatory Overview (Simulcast), Martin
- March 4 Tennessee Environmental Regulatory Overview (Simulcast), Kingsport
- March 5 Tennessee Environmental Regulatory Overview, Cookeville
- March 5 8-Hour Site Worker Refresher (HAZWOPER), Knoxville
- March 6 Tennessee Environmental Regulatory Overview, Spring Hill
- March 7 Tennessee Environmental Regulatory Overview, Lewisburg
- March 11 Toyota Kata: A Management System for Sustaining Lean/Continuous Improvement, Jackson
- March 11 OSHA 511 Occupational Safety and Health Standards for General Industry Nashville

CTAS

- March 4 Writing Quality Job Descriptions Johnson City
- March 5 Writing Quality Job Descriptions Knoxville
- March 11 Writing Quality Job Descriptions Jackson
- March 12 Writing Quality Job Description Franklin

LEIC

- March 10-11 DNA Collection, Identification & Preservation, Brentwood
- March 26-27 Active Shooter Lexington (Tenn.)

MTAS

- March 4 Writing Job Descriptions, Johnson City
- March 4 Effective Leadership Series: The Power of Words, Jackson
- March 5 Human Resource Overview, Collegedale
- March 5 Writing Job Descriptions, Knoxville
- March 5 Effective Leadership Series: The Power of Words, Nashville

- March 11 Effective Leadership Series, The Power of Words, Johnson City
- March 11 Writing Job Descriptions, Jackson
- March 12 Managing Change and Transition, Franklin
- March 12 Writing Job Descriptions, Franklin
- March 12 Effective Leadership Series: The Power of Words, Knoxville
- March 12 Employee Performance Evaluations Cleveland
- March 14 Interviewing, Selection and Recruitment Greeneville
- March 19 Internal Control and Auditing, Memphis
- March 19 Internal Control and Auditing, Jackson
- March 19 Internal Control and Auditing, Nashville
- March 19 Harassment and Workplace Violence Collegedale
- March 19 Internal Control and Auditing, Kingsport
- March 19 Internal Control and Auditing, Knoxville
- March 19 Internal Control and Auditing Chattanooga
- March 25 Effective Leadership Series: The Power of Words, Collegedale
- March 26 Conflict Management, Cleveland

The EXCHANGE is a newsletter of
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CHARLES E. SHOOPMAN
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