

MEMO# 3200

October 17, 1991

PROGRESS REPORT AND DATE OF NEXT MEETING

October 18, 1991 TO: HUMAN RESOURCES AND TRAINING WORKING GROUP NO. 1-91 RE: Progress Report and Date of Next Meeting

Since our meeting on August 22, the Institute staff has been busy putting together a structure that will enable us to better respond to the needs of human resources and training personnel within the investment company industry. I am pleased to inform you that Doug Gehrman, Senior Vice President, Human Resources for American Capital and Management & Research, Inc., Houston, TX has agreed to chair our working group. In our memo to you dated September 17, we advised that we would have four task forces. However, after considerable thought and discussion with Doug, we have decided to combine the personnel and organizational issues into one task force. We believe these three task forces will effectively represent, and bring to the full working group, the broad array of issues that confront human resources and training personnel. I am pleased that the following individuals have agreed to serve as chairs for the three task forces: Compensation and Benefits Chris Walsh Newman Vice President Scudder, Stevens & Clark Boston, MA Training and Registration Issues Ann Murphy Ass't Vice President & Manager of Training and Human Development The Boston Company Advisers Boston, MA Personnel and Organizational Issues Michael Festa Vice President, Human Resources Keystone Group, Inc. Cambridge, MA Please refer to the enclosed report for a listing of individuals who have agreed to serve on the various task forces. We have scheduled the next meeting of the committee for Tuesday, November 19 at the Vista Hotel here in Washington. We plan to hold separate concurrent meetings of the task forces beginning at 10:00 am, followed by a meeting of the full committee. Our meeting should conclude by 4:00 pm. What we hope to accomplish at this next meeting is to begin the process of identifying the issues that we believe are important and establishing a mechanism for responding to those issues. It would be helpful for you to come to the meetings prepared to discuss those issues on which you believe we should focus our attention. Please complete the enclosed registration form to let us know if you will be attending the meetings on November 19. Be sure to indicate which task force meeting you prefer to attend. We look forward to seeing you next month. Thomas S. Simmons Vice President - Administration Enclosures

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