

MEMO# 12546

August 30, 2000

SURVEY FOR ICI OPERATIONS CONFERENCE

[12546] August 30, 2000 TO: OPERATIONS COMMITTEE No. 21-00 TRANSFER AGENT ADVISORY COMMITTEE No. 42-00 RE: SURVEY FOR ICI OPERATIONS CONFERENCE This year's ICI Operations Conference will feature a panel on "Workforce Retention and Development" to be held on Tuesday, October 17 from 1:30 to 2:45 p.m. The panel discussion topics include best places to work, best practices, work alternatives, telecommuting and mentoring. The panel will be moderated by Charles O'Neill of Diversified Management Resources, Inc and panelists are William MacKenzie of Deloitte & Touche, LLP, Devon Scheef of Scheef Organizational Development and Training and Karen Walsh of Putnam Investments. Charles O'Neill has prepared a survey on retention and development issues and will share the results during the panel presentation at the Operations Conference. All survey results will be aggregated and compiled by the Institute. No individual responses will be shared with the panelists. If you would like to participate in the survey please complete the attached survey response form and fax to the undersigned at the Investment Company Institute. The fax number is 202/326-5853. If you have any questions regarding the survey, you may call Justine Phoenix at 202/326-5850 or Charles O'Neill at Diversified Management Resources at 617/338- 3040 ext. 201. The Operations Conference program and registration form is available on the ICI member website: <http://members.ici.org>, or you may call the Institute's conference division at 202/326-5968 to obtain a program. Thank you for your cooperation; we look forward to seeing you at the ICI Conference in San Diego! Justine Phoenix Director - Operations/ Distribution & Services Attachment 2 Attachment (in .pdf format)