

MEMORANDUM OF UNDERSTANDING

between

(IFPTE) LOCAL 94

and

DEPARTMENT OF ENERGY, IDAHO OPERATIONS OFFICE

1. This Memorandum of Understanding (MOU) is entered into by the Department of Energy, Idaho Operations Office, hereinafter referred to as the EMPLOYER, with the International Federation of Professional and Technical Engineers, Local 94, hereinafter referred to as the UNION. This MOU is applicable to the change in the conditions of work resulting from the lateral reassignment of three bargaining unit employees into team leader positions. This agreement focuses specifically on issues pertaining to training and performance management. The EMPLOYER and the UNION agree that the terms and conditions of this agreement shall apply to all future lateral reassignments of bargaining unit employees to team lead positions.
2. It is the intent of the EMPLOYER and the UNION that each newly assigned Team Leader will be provided with the skills necessary to perform successfully as a Team Leader. In order to accomplish this, the EMPLOYER agrees to provide tuition and travel for at least one class directly related to supervision, management, or leadership. In addition, the EMPLOYER agrees to provide tuition for at least one distance learning class. The immediate supervisor must approve these courses in the Individual Development Plan (IDP) as discussed in #4 below. These courses must be provided to the employee within the twelve-month period discussed in #4 below. The EMPLOYER encourages the affected employees to utilize the on-line learning resources available to all DOE-ID employees.
3. The EMPLOYER and the UNION agree that the newly assigned team leader will be given a full twelve-month performance rating period. During this rating period, the newly assigned Team Leader will remain on the current three-tier (Does not Meet Expectations, Meets Expectations, and Exceeds Expectations) performance rating system. The EMPLOYER and the UNION acknowledge that the current system may be replaced in the future, at which time the new system will apply during the twelve-month performance-rating period.
4. The EMPLOYER and the UNION agree that the following activities will take place during the twelve-months immediately following the date effecting the reassignment of bargaining unit employees to team lead positions.

Within two weeks of assignment as a Team Leader:

- 1) Management will finalize the newly assigned Team Leader's position description document.

MOU-1

2) The newly assigned Team Leader and the immediate supervisor will review the position description document to identify specific supervisory duties that have been assigned. The document "Who's A Team Leader" should be used to ensure that the assigned supervisory tasks are consistent with designation as a Team Leader. Team Leader performance requirements and expectations will be adequately defined and communicated in the performance agreement by the immediate supervisor.

3) The newly assigned Team Leader and the immediate supervisor will review the list of assigned supervisory tasks and will jointly determine the skills necessary for performing those tasks.

4) The newly assigned Team Leader and the immediate supervisor will jointly determine if the newly assigned Team Leader has the skills identified in the previous step, or if further skills development is required.

5) If skills are identified as requiring further development, the newly assigned Team Leader and the immediate supervisor will prioritize the order for gaining those skills in the IDP.

Within three weeks of assignment as a Team Leader:

1) The newly assigned Team Leader, with the assistance of the DOE-ID Training Division, will identify the training, both formal and non-formal, necessary to develop the skills that were identified as needing development.

2) The newly assigned Team Leader will add the identified training to his/her IDP in the priority jointly determined, and will submit the IDP for approval.

3) The supervisor will review and approve the newly assigned Team Leader's IDP.

4) Training that was jointly identified by the newly assigned Team Leader and approved by the immediate supervisor must be completed within twelve months. At each three-month interval the employee and supervisor will status as indicated below.

Three months following assignment as a Team Leader:

1) The immediate supervisor will conduct and document a performance review based on newly assigned Team Leader performance as compared to the performance requirements and expectations defined in the performance agreement.

2) The immediate supervisor will develop remedial actions for improving newly assigned Team Leader performance in areas that are not considered to Meet Expectations or Exceed Expectations.

3) The immediate supervisor will review the IDP to ensure training has been completed as scheduled. If supervisor development training has not been completed as scheduled, the supervisor will document in writing reasons for training not being completed and initiate a corrective action plan.

Six months and nine months following assignment as a Team Leader:

1) Conduct and document a performance review based on newly assigned Team Leader performance as compared to performance requirements and expectations defined in the performance agreement.

2) Develop remedial actions for improving newly assigned Team Leader performance in areas that are not considered to Meet Expectations or Exceed Expectations.

3) Review IDP to ensure training has been completed as scheduled. If supervisor development training has not been completed as scheduled, the supervisor will document in writing reasons for training not being completed, provide this information to the responsible Assistant Manager and Human Resources Director, and initiate a corrective action plan.

Twelve months following assignment as a Team Leader:

- 1) Conduct and document a performance review based on newly assigned Team Leader performance as compared to performance requirements and expectations defined in the position description.
 - 2) If performance is determined to not Meet Expectations or Exceed Expectations, develop remedial actions for improving newly assigned Team Leader.
 - 3) Review IDP to ensure training has been completed as scheduled. If supervisor development training has not been completed as scheduled, the newly assigned Team Leader or the Union may seek relief through the negotiated grievance procedure. The immediate supervisor will in writing document this information to the responsible Assistant Manager and Human Resources Director. The HR Director will require a formal corrective action plan from the Assistant Manager and report this situation to the Office Manager.
4. Any disputes regarding this agreement will be addressed through the negotiated grievance procedure.
5. This MOU may be reopened at any time by mutual agreement between the UNION and the EMPLOYER. Should an agreement not be reached upon reopening, this MOU shall remain valid.


For the UNION Date Feb 1, 2003


For the CFAO Date 2-4-03