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Section 3. Training Instructor Selection

- 1. Where no formal training instructor agreement exists, selection for job instructor training and formal classroom instructor training will be made under a competitive promotional procedure as follows: The Agency will solicit volunteers and consider the following factors in making instructor assignments – availability, teaching expertise, subject matter expertise (including how current the employee’s technical training has been done and recent instructor experience). Any ties among equally qualified instructors will be broken by seniority, first among qualified candidates within the commuting area where the training is to take place, and then among remaining qualified instructors. If insufficient qualified employees volunteer, the Agency will select qualified employees.**
- 2. The Agency will make every effort to rotate instructor assignments among qualified instructors so far as training instructor requirements permit.**
- 3. At the end of each training session, the participants will evaluate the instructors, teaching expertise and training abilities based on a survey prepared by the Agency.**

49 **4. All Agency provided training will be conducted by instructors who are**
50 **trained and qualified to provide such training.**

51
52 **5. At the option of the Union, it may elect to retain one or more training**
53 **agreements.**

54

55 **Section 2 4. Non-Discrimination**

56

57 The parties agree that nomination and/or selection of employees to participate in
58 training and career development programs and courses shall be nondiscriminatory and
59 made without regard to sex, race, **color**, religion, age, marital status, ethnic group,
60 handicap, sexual orientation, parental status and Union membership or activity, and
61 shall be in accordance with equal employment opportunity guidelines, and consistent
62 with other applicable laws **and the terms of this Agreement.**

63

64

65 **Section 3 5. Training – Job Related (Technical and General)**

66

67 A. Employees will not incur costs for agency required training necessary for the
68 performance of their assigned duties.

69

70 B. When training is required as part of a career ladder plan, the agency is responsible
71 for ensuring that it is provided.

72

73 **C. Employees will be allowed approximately 30 minutes per work day as self-**
74 **training to read and review policy, procedures and/or other changes relating to**
75 **their work.**

76
77 **D. Employees will not be penalized in any manner, including during the**
78 **performance evaluation process, for participation in self-training or required**
79 **training to perform their assigned duties.**

80
81

82 **Section 4 6. Career Development**

83
84
85
86

84 Career development for individual employees shall be encouraged through
85 establishment of an Individual Development Plan (IDP).

87 A. The administration agrees, on a ~~an~~ **semi-annual basis during performance**
88 **discussions** to provide information and assistance, if necessary, to employees for
89 the purpose and means of establishing IDPs. The approving management official
90 will also be identified.

91

92 B. Because of the nature of their appointments, IDPs are not appropriate for term or
93 temporary employees.

94

95 C. Employees may initiate IDPs through their designated management official (**i.e.,**
96 **appraising official**). The designated management official will, if requested, assist
97 the employee in the preparation of the IDP and will review it with the employee to
98 assure conformance with organizational needs and individual career needs. The
99 plan will be referred to the designated approving official and the employee will be
100 notified of approval/disapproval or the need for modification.

101
102 **D. The parties agree that the primary purpose of IDPs will be first, to address the**
103 **employee’s competency (knowledge, skills and abilities) needed in his/her**
104 **current position; second, to prepare the employee for new career**
105 **opportunities; and third, to address the competency needed for advancement**
106 **beyond his/her current position. Each plan shall establish a series of**
107 **milestones and shall state the responsibilities of each party in order to realize**
108 **such milestones.**

109
110 **E. In the preparation of the IDP, on duty time, the employee may seek assistance**
111 **from career counselors, employee development specialists and other Agency**
112 **officials, as well as the Union, who may provide advice and assistance in the**
113 **preparation of the plan.**

114
115 **F. No employee will be penalized in any manner during the performance**
116 **evaluation process for not implementing or completing an IDP.**

117

118

119 **Section 5-7. Training Programs**

120

121 **A.** ~~The Administration will remind employees, at least annually, of the availability of~~
122 ~~Government-sponsored training programs, the general scope of training, the~~
123 ~~criteria for approval of training, and the nomination procedures. The~~
124 ~~Administration agrees to advise individual employees, upon request, of currently~~
125 ~~available Government-sponsored training courses so as to provide the employee~~
126 ~~the opportunity to express timely interest. **The Agency will provide ongoing**~~
127 **information via Intranet/Internet concerning training and educational**
128 **programs as they become available.**

129

130 **B.** The Administration will remind employees, at least **semi-annually**, of the
131 availability of Government-sponsored training programs, the general scope of
132 training, the criteria for approval of training, and the nomination procedures. The
133 Administration agrees to **post all training opportunities in accordance with**
134 **the procedures in the National Agreement and** advise individual employees,
135 upon request, of currently available Government-sponsored training courses so
136 as to provide the employee the opportunity to express timely interest.

137

138

139

140 ~~B C.~~ Training nominations and/or approval will be based on the potential use of the
141 training in the employee's current position, or IDP if any, and other criteria
142 established by applicable law, rule or regulation. Nominating and approving
143 officials will apply such criteria ~~equitably~~ **in a fair and equitable manner.**
144

145 ~~G D.~~ When an employee is nominated for training, a copy of the employee's IDP, if
146 any, will be attached to the nomination and will be considered in the process.
147 Employees will be notified in writing of the approval or disapproval of their
148 nominations and the reason for disapproval. To the extent feasible, employees
149 will be notified of the approval or disapproval prior to the starting date of the
150 training. Should an employee's nomination for training, including training courses
151 contained in an IDP, be disapproved for lack of resources, the **employee's**
152 **nomination will be held in abeyance for approval of future available funds.**
153 ~~may be re-nominated as funds later become available, and the nomination will be~~
154 ~~given first consideration.~~

155
156 ~~D. Employees or managers may initiate discussion of individual training needs. Such~~
157 ~~discussions may or may not be linked to an IDP.~~
158

159

160

161

161 **Section 6 8. National Training Committee**

162

163 A. The Agency and the Union have agreed to **continue the form** a National Training
164 Committee (NTC). The purpose of the NTC is to review agency training and career
165 development programs and make necessary recommendations. It shall meet to
166 discuss: training methodologies, training and career development needs, education
167 and communication, efficacy of training initiatives; and other related issues. It will be
168 a focal point for sharing information on agency-wide training and career
169 development.

170
171 B. The NTC is a recommending body that will use consensual decision making to
172 address issues. It will meet ~~two (2)~~ **four (4)** times per year and submit joint
173 recommendations to the Deputy Commissioner for Human Resources, with a copy
174 provided the General Committee Spokesperson.

175
176 C. The NTC will be composed of twelve (12) members. Six (6) will be appointed by the
177 Union and six (6) by the Agency. The NTC will meet **quarterly**, during the first, ~~and~~
178 ~~third quarters~~ **month of each quarter** of the calendar year. Dates for these
179 meetings will be set by mutual consent of the parties. The meetings will be face-to-
180 face. Additional meetings may be jointly agreed to. The meeting(s) will be for three
181 days, but may be extended by mutual consent. The Agency will pay for all meeting-
182 related travel expenses as well as per diem for five (5) American Federation of
183 Government Employees travelers. The meetings will be held in Central Office;
184 however, the committee may jointly recommend that the meeting be held elsewhere.

185 ~~Official time authorized for NTC meetings will be handled in accordance with Article~~
186 ~~30.~~

187

188 D. Establishment of this committee is not a waiver of Union statutory rights to
189 information, consultation or negotiations **in accordance with** ~~pursuant to 5 U.S.C.~~
190 ~~74~~ **the National Agreement.** The Union reserves the right to request negotiations
191 on issues impacting conditions of employment.

192

193 E. This national committee does not preclude any local arrangements that may exist.
194 Training may be an appropriate subject for Component, Regional or lower level
195 meetings subject to the mutual consent of the parties.

196

197

198 **Section 7.9. IVT**

199

200 IVT consists of a one-way, point-to-multi point satellite video network and interactive
201 distance learning response system that creates a virtual classroom which allows
202 **participating employees and instructors to interact.** ~~instructors at one site to~~
203 ~~simultaneously train hundreds of trainees elsewhere.~~ The agency is committed to
204 ongoing evaluation and improvement so that all participants receive effective training.
205 Neither party waives its rights ~~under 5 U.S.C. 74~~ regarding IVT.

206

207

208 **Section 8 10. Technical Mentoring**

209

210 A. Technical Skills Mentoring is defined as providing appropriate on the job assistance
211 to employees new to particular jobs.

212

213 B. Mentors should be highly motivated, knowledgeable employees with good
214 interpersonal skills.

215

216 C. **All formal mentoring agreements in existence on the effective date of this**
217 **agreement or before April 5, 2004 are hereby adopted and included herein by**
218 **this reference.** Where no formal technical mentoring agreement exists,
219 management will make every reasonable effort to:

220

221 1. Allow interested employees who are qualified to volunteer in the mentoring
222 process. Where management believes an employee is not qualified to mentor or
223 decides not to utilize the employee in the mentoring process, they will discuss the
224 reasons with the employee, if requested.

225

226 2. Accommodate employees with special needs or special equipment by obtaining
227 mentors who are familiar with special equipment or accommodations used by
228 individuals.

229

230 3. Consider an employee's request to freely withdraw from mentoring, and if denied
231 provide a written explanation.

232
233 D. Management recognizes that mentoring may consume a portion of the mentor's time
234 and consideration will be given to adjusting workloads as deemed necessary.

235
236 E. The mentoring phase of training is a learning period that enables employees to
237 become familiar with their new assignments. Management realizes that there is a
238 learning curve in the mentoring process. The mentoring process should ideally
239 involve three way ongoing communication among the technical mentor, the
240 employee and management.

241
242 F. Management recognizes the importance of continuity and will make every
243 reasonable effort to ensure that the mentoring process is completed without
244 interruption.

245
246 G. Trainees who believe they need additional assistance or training at the conclusion of
247 their mentoring period may make a request for management's consideration.

248

249

250 **Section 9 11. Training Expenses**

251

252 **A.** When training is approved, the Administration will pay costs of tuition, required
253 textbooks and other expenses as appropriate, and may pay travel costs, subject to
254 travel regulations and fiscal considerations. If travel funds are not authorized and
255 the training would otherwise be approved, the employee will be notified and given
256 the option of attending the training without travel reimbursement. Duty time will be
257 approved for training, when it is scheduled during the employee's basic workweek,
258 unless the training is deferred or cancelled.

259

260

261 **B. The Agency shall reimburse appropriate costs for mandatory courses required**
262 **to obtain and/or maintain certification and/or licensure related to employees'**
263 **current positions. This includes as examples, courses for attorneys continued**
264 **bar memberships, courses for nurses and physicians. Duty time will be**
265 **approved for an employee to attend these courses when scheduled during an**
266 **employee's basic work week.**

267

268

269 **Section 12. Ongoing Continuing Education**

270

271 **A. The parties agree that providing continuing education for employees is**
272 **important for the Agency to carry out its mission.**

273

274 **B. The Agency will make every effort to provide all employees with ongoing**
275 **educational opportunities and will collaborate with local colleges and**
276 **universities to offer academic courses and continuing education classes on**
277 **either SSA campuses or at a nearby location.**

278
279 **C. The Agency will provide ongoing information via Internet regarding available**
280 **courses and identify what courses will be made available to employees at**
281 **SSA's campuses or at a nearby location.**

282
283 **D. Inasmuch as many academic courses are given through IVT and/or computer**
284 **video networking, the Agency will identify which courses will be given by**
285 **these methods.**

286
287 **E. The Agency will provide employees appropriate administrative time to**
288 **participate in taking academic courses and continuing education classes if**
289 **such participation is associated with or will improve the performance of their**
290 **assigned duties.**

291
292 **F. The Agency will survey employees at least semi-annually to determine**
293 **employees' interest in participating in academic courses and continuing**
294 **education classes, as well as to identify the courses that should be made**
295 **available to employees.**

296