

ARTICLE 29
TRAINING AND CAREER DEVELOPMENT

Section 29.01 - General.

- (1) It is recognized that training and development of employees is a matter of importance and is clearly in the public interest. The Department agrees to provide the opportunity for and to consider the views of the Union in order to maintain progressive, effective policies and programs designed to:
 - (a) Aid employees in improving performance in their current positions;
 - (b) Provide career mobility and advancement opportunity within the Department;
 - (c) Establish and continue training programs that are supportive of the Equal Employment Opportunity and Affirmative Employment Programs of the Department; and
 - (d) Provide re-training and cross-training to support and maintain Departmental programs and initiatives.
- (2) The Department is responsible for ensuring that all employees receive the training necessary for the performance of their assigned duties.
- (3) The Department shall advise the Council President of the Department's overall training plans and goals, appropriations and allocation to each office no later than 60 days after the appropriations and allocation are received.
- (4) The Department shall consider providing government and non-government sponsored training to employees, upon request.
- (5) Employees training and development will be administered in accordance with all applicable laws, rules, regulations, and the provisions of this Agreement.
- (6) The nomination and/or selection of employees to participate in training and career development programs and courses shall be nondiscriminatory, conducted in a fair and equitable manner and shall not exclude employees due to Union membership or activity.
- (7) The Department shall maintain up to date information about training courses, programs, and seminars conducted or sponsored by the Department as it becomes aware of such opportunities. For training opportunities that are not announced through HUD LEARN or HUD Virtual University, this information shall be made available in such a way as to provide advance notice through HUD@work, Listserv, etc. to all employees in the program area(s). If Management notifies one employee of a training opportunity, Management shall notify all employees in the program area in the same series and grade of the training opportunity. However, Management makes the final determination regarding training assignments.

- (8) Employees will be notified briefly in writing (e.g. email) if their training request or nomination is approved or denied. If denied, upon request the notification will reflect the reason(s) for the denial. To the extent feasible the notice will be provided to the employee prior to the start date of the training.
- (9) When positions are abolished or re-engineered as a result of reorganization, change in mission, budget priorities, work elimination, introduction of new duties, transfer of work, or implementation of new technology, management agrees to provide appropriate training.
- (10) If appropriate based on work volume and the amount of time the employee is participating in training, deadlines and goals in performance elements and standards shall be adjusted to account for the amount of time employees will be participating in training and/or career development programs.
- (11) Participation in training activities or programs does not guarantee employees' eligibility or qualification for a promotion.
- (12) Employees are encouraged to request and discuss training opportunities and needs with their supervisors throughout the year.
- (13) The Department shall encourage training opportunities for employees in positions with no career ladder potential to enhance their careers to the maximum extent feasible. When available, management shall give serious consideration to allow such employees to audit training opportunities offered to higher graded employees if attendance does not require additional funds from the Department and does not negatively affect the mission of the Department.
- (14) Continuing education classes for mission or position qualifications are eligible for departmental training opportunities.

Section 29.02 - Upward Mobility. The Department's Upward Mobility policy/program is established and implemented in accordance with HUD Handbook 951.1 dated December 11, 1998, and this Agreement.

- (1) The Department shall provide training programs in support of employees selected for the Upward Mobility program through the Merit Staffing Procedures outlined in Article 24 of this Agreement. This training shall be directed toward providing the knowledge and skills required by the targeted positions.
- (2) The implementation and effectiveness of the Upward Mobility training program may be reviewed at the local level by the Labor Management Forum(s) and may be discussed, as well, in the local and National Labor Management Forums. Management shall consider

the Union's recommendations concerning improving the effectiveness of the Upward Mobility Program.

- (3) Recognizing the Department's commitment to establish and maintain a well-trained and productive workforce, the Department will continue efforts to implement an effective Upward Mobility Program which contains credible goals or target number of positions for each Program/Support Area.

Section 29.03 - Development Programs. The current policies and procedure for Development programs such as, the Emerging Professional Program (EPP), Emerging Leaders Program (ELP), and Leadership Development Program (LDP) are no longer in effect. The parties agree to bargain the programs or successor program(s), including policies and procedures prior to implementation under the provisions of Article 49. Employees who are current or former participants in these programs are still subject to the provisions of the existing programs.

Section 29.04 - Training Committee. In accordance with Article 3 of this Agreement the Labor Management Forum(s) shall serve as the training committee or may be a subcommittee to the applicable LMF.

Section 29.05 - Training Criteria.

- (1) The Department may provide training to non-temporary employees that in certain instances may lead to promotion. The Department will follow its merit staffing procedures when selecting a non-temporary employee for such training when selecting non-temporary employees for training that permits non-competitive promotion after successful completion of the training.
- (2) Unless specified or negotiated otherwise all training requests shall be processed in accordance with applicable Departmental policy, government-wide regulations, and the Government Employee Training Act of 1958, as amended. The Department may use the following criteria. The criteria shall be explained upon request, to employees when developing an Individual Development Plan (IDP) and when approving or developing a training request:
 - (a) Availability of funds;
 - (b) Relationship of the training to the employee's ability to meet or exceed required standards of performance for the employee's current job or for the job which the employee has been selected to fill;
 - (c) Potential use of the training for readily foreseeable developments or events in the Department's programs;
 - (d) Consistency with plans for the employee's career development;
 - (e) Equitable distribution of training opportunities; and

- (f) Expectation that the training could help the employee correct a deficiency in performance.
- (3) The Department, in conjunction with the Union, may develop additional criteria in accordance with government-wide regulations.

Section 29.06 - Individual Development Plans.

- (1) Each employee shall be entitled to voluntarily establish an Individual Development Plan (IDP) to be used as a roadmap for the employee's professional and career development. The IDP shall be submitted to and approved by the employee's supervisor. The IDP is responsive to the needs of the organization and the employee. An IDP may include on-the-job developmental assignments. Self-directed training or development activities may be conducted during duty time upon supervisory approval, if such activities are related to the employees current or prospective job duties.
- (2) The IDP is a working document, which may be updated as necessary. They may seek assistance from managers, HR Specialists, Employee Development Specialists, Administrative Officers and Regional Support Managers. Supervisors may provide advice and additional information on assignments, developmental activities, and training. Employees will not be penalized via the performance evaluation process for not completing or not implementing an IDP.
- (3) IDPs shall be implemented within resources available, and take into consideration workload demands. Training opportunities will follow the provisions of Section 29.05, Training Criteria.
- (4) The Departmental IDP Workbook provides guidance on the IDP planning process and on preparing the IDP Form (HUD Form 8059) which is located in the workbook as well as in the Career Development and Training Bulletin Board on the HUD@Work web site.
- (5) An IDP shall be required of employees in a formal training program, such as the upward mobility, Presidential Management Fellow or intern programs. The Department shall initiate this type of IDP.
- (6) IDP's are not mandatory and employees will not be penalized via the performance evaluation process for not completing or not having an IDP. Any training assessment tool used by Management to determine an employee's training needs shall not in and of itself be used to adversely affect the employee's performance rating, qualifications for the position, or promotion consideration. Any self-assessment is voluntary. Nothing in this paragraph precludes management from exercising its right to address performance issues through management-directed training.

- (7) Employees' performance ratings will not be used as a basis for approval or denial of training opportunities.

Section 29.07 - Training Records. The Department shall maintain training data which shall include an analysis of the training, broken down into the categories of sex, minority grouping, and grade range. The Department shall make available to the Council (upon request and no more than twice a year) a copy of the report containing this data. A copy of the Department's centrally managed Training Schedule shall be provided to the Council President upon request and as soon as it is available.

The Department will record in HUD Virtual University (HVU) or its successor all approved and completed training. Employees may record any training and educational achievements completed outside the Department in HIHRTS.

Section 29.08 - Accommodation for Training. Employees may be granted variations within the normal workweek, including leave without pay and absence without charge to leave, for training when the primary objective of the training is to improve the employees' work related skills, knowledge, and abilities or career growth. The Department shall, to the maximum extent practical, ensure the scheduling of training (over which the Department has administrative control) so that it occurs during the normal work week, including travel to and from training. When an employee's normal work schedule is different from the hours of training, i.e., Alternative Work Schedule (AWS), the employee's AWS may be temporarily suspended as acknowledged by the signature of the supervisor and employee on the training form, i.e., SF-182.

Section 29.09 - Membership in Organizations. Employees are encouraged to join and participate in organizations which are related to their work.

Section 29.10 - Orientation Sessions.

- (1) The Department shall provide the Union with the opportunity to meet with new employees during the first week of their employment. In addition, The Department shall provide the Union reasonable advance notice of the date, time, and location of any orientation meeting that may be held for groups of new employees. This notice shall include a general identification of who shall be in attendance. The local Union shall be afforded the opportunity at such meetings to explain and/or hand out material on the role of the Union, including identifying Union representatives.
- (2) The Department shall distribute an electronic copy of this Agreement and all supplements to each employee, along with a statement of where to locate the Agreement and Supplements on the HUD website.
- (3) The Department will provide information relating to the Thrift Saving Plan (TSP) during new employee orientation sessions. Additional information is available on the HUD internal web site.

Section 29.11 - Continuation of Service Agreement. Continued Service Agreement (CSA) is an agreement by the employee to continue in service upon completion of the training over 80

training hours. The period of service obligation will begin on the day following the 80 training hour of reimbursed training. The duration of the additional service is equal in duration to not more than three times the length of the reimbursed training in excess of 80 training hours.

An employee participating in training that requires a CSA shall agree in writing with the Department before participating in the training that they will:

- (1) Continue in the service of the Federal Government after the end of the training period for a period at least equal to three times the length of the training period unless they are involuntarily separated; and
- (2) Repay the amount of the expenses incurred by the Department in connection with the training if they voluntarily separate from the service of the Federal Government before the end of the service agreement.
- (3) The Department may pro-rate service in connection with the training if the employee is voluntarily separated from the service of the government before the end of the period for which the employee has agreed to continue in the service of the government.
- (4) The Department's right to recover the expenses of training may be waived, in whole or in part, only if one or more of the following conditions exists:
 - (a) The employee has completed most, but not all, of the required period of service;
 - (b) The employee resigned because of his or her own illness or the serious illness of a member of his or her immediate family; or
 - (c) The employee is unable to make payment because of severe financial hardship.
- (5) A waiver of the Service Agreement must be requested in writing and submitted to the Chief Human Capital Officer or his/her designee.

Section 29.12 - Mentoring Program. The Department recognizes the benefits of a mentoring program and encourages the use of the program.

- (1) The purpose of the HUD Mentoring Program is to assist all HUD staff from entry level to Executive level - to succeed in achieving their career goals and to increase their proficiency on the job.
- (2) The Mentoring Program will provide an opportunity for experienced HUD staff (Mentors) to help and guide other HUD staff (Mentees). With supervisory approval, mentors and mentees may be allowed appropriate time to meet. Mentoring relationships may be terminated at anytime by either the mentor or mentee. However, the Mentoring Program Coordinator must be notified if the relationship is terminated.

- (3) A Mentoring Program Coordinator is designated to oversee the planning and implementation of the Program. Training of mentor/mentee pairs will be provided before mentors and mentees begin to work together.

Section 29.13 - Retirement Planning Training. The Department will provide a retirement planning training session at least once a year. Employees shall be allowed to attend on duty time once per year, with supervisory approval. The training shall be free of charge. This training shall include information on financial and investment opportunities through the Thrift Savings Plan (TSP).

Section 29.14 - Training and Career Development Expenses

- (1) Where there are authorized training expenses incurred by the employee, the Department shall pay the expenses as soon as practicable but no more than 30 days after submission.
- (2) Employees will not incur costs for Department-required training necessary for the performance of their assigned duties.
- (3) When a change in qualifications for a position mandates an additional requirement for an employee already holding that position the Department will pay for the training needed for the employee to meet the new qualification in their position and grade level unless the employee is grandfathered in, as allowed by applicable laws and regulations and if funding is available. If the additional requirement is a degree and the Department will pay for the degree, competitive procedures must be followed in accordance with law and regulation.
- (4) The Department may pay employees' expenses for attending conferences and meetings authorized by 5 U.S.C. Section 4110 when the following criteria are met as provided in 5 CFR 410.404:
 - (a) the announced purpose of the conference is educational or instructional;
 - (b) the content of the conference is germane to improving individual and/or organizational performance;
 - (c) more than half of the time in the conference is scheduled for planned, organized exchanges of information between presenters and audience which meets the definition of training in Section 4101 of title 5 U.S.C.; and
- (5) Developmental benefits will be derived through the employee's attendance. When employees are in an academic degree programs, the Department may reimburse employees for appropriate costs, subject to the availability of funds, and in the following circumstances subject to the provisions of 5 USC § 4107 1) when it is necessary to assist in the recruitment or retention of employees in occupations in which the Government has or anticipates a shortage of qualified personnel; and 2) to address the government's human capital management and strategic plan. Selection for such training is subject to the merit staffing procedures in Article 24.

- (6) At the beginning of the fourth quarter of each fiscal year, program/support offices will review the office's unobligated training funds against any pending and denied 182s/training requests/employees' training needs, and the Department will fairly allocate the funds in accordance with the office's training priorities.
- (7) When training resources are limited, approval for training funds will be based on the Department's and individual employee's developmental needs.

Section 29.15 - Training Time. Workloads shall be adjusted as appropriate based on work volume and the amount of time the employee is participating in approved training or career development; however, employees and their supervisors should use sound judgment and time management to insure that the mission of the Department is performed.