

**Date: 2/3/06**

## **LMC ISD-Sub Committee meeting**

Attendees: Union Reps Jerry Buty, Ed Hirsel, John Anthony, Tom Fronza, Robin Houser, Peajai Keyse (alternate),  
Management: Chuck Kumpar, Frank Tolbard, Jim McAndrew, Stacey Senita

The meeting started at 10:04am, Recording Secretary Robin Houser asked for permission to record the meeting. Permission was denied by Chuck Kumpar. It was agreed that the meeting minutes will be transcribed within 2 weeks; they will be signed by John Anthony, Union President and Chuck Kumpar of Human Resources.

John opened the meeting stating the reason for and goals of the LMC ISD- Sub committee. The committee was formed as part of a grievance settlement regarding release time for an IT class that a supervisor and the Assistant Administrator approved, but was then denied at a higher level based on the employee's current job duties. Currently ISD employees complete a different request form than other Taxation employee's and the approval policy is also different. The goal of this committee is to facilitate a Taxation wide policy and procedure for training requests and approvals regardless of the Division, Unit, or current job duties of the employee or the source of funding for the class. The various funding sources could be from ED&T, WFD, or individual Department budget.

**I- Training Policy:** The union proposes all requests start with the employee completing ED&T's form, which is then forwarded to the supervisor and then to their Administrator. Once those approvals are met then ED&T should receive the request, add it to TRAX for the employee and notify them that their request is approved and release time is granted. This will also ensure that everyone's TRAX transcript is current and up to date.

Stacey noted that currently it is the employee's responsibility to complete the course and send ED&T a copy of the certificate of completion to get their TRAX transcript updated.

Jim McAndrew asked for a clarification of the issue, Was the Union's concern just for ISD or for all Taxation? The Union reps replied, both. We are seeking one policy and process flow which would cover all Taxation employees.

Jim McAndrew asked Stacey if ISD was the only area that went to class outside the department. Stacey replied that others do seek outside training but not as often as ISD employees.

Jim McAndrew asked Stacey what the approval flow is for Taxation. Stacey stated that the employee completes the form then their supervisor signs off, then their Administrator then ED&T sets it up in TRAX. ED&T tries to watch for too many requests or not enough from any one person or area.

Chuck suggested setting a set number of hours per employee per year.

**Date: 2/3/06**

## **LMC ISD-Sub Committee meeting**

Chuck summarized that “We do in fact need one standard process, and it should be that of ED&T where the employee requests their supervisor and immediate Administrator or Asst Administrator approves and ED&T notifies the employee of approval and logged in TRAX.”

### **II- Job Classification based training should reflect a technology path with employee input.**

Currently we are unable to get the training in order to receive a promotion.

Chuck stated – Not on our dime or our time as been past practice.

John countered with, Our Dime (WFD) your time. John suggested that skill sets and promotion opportunities become a standard consideration in determining release time for classes.

Jim McAndrew agreed that communication of requests need to go up the chain and also back down. Jim expects the employee to go to their supervisors and request the training they feel they need to do their job or support the new application that is being developed.

### **III – Release Time for classification relevant training with travel allowances.**

Ed Hirsel stated that the biggest issue for Tech Classes is the fact that they’re usually Out of State and require additional travel & lodging fees as well as additional Administrative management levels. Columbus is not a “Training Hub” and we need to be able to come up with alternatives.

Stacey said release time for college credited classes is not granted.

Frank said that he is aware of WFD money being used and release time being granted if the class pertains to that employees job.

John agreed to setting a standard minimum number of hours of leave per employee be granted.

Stacey noted that if the unit allows for flex time that it could be used to offset the release time.

John felt that Hyper flex – Middle of the day leave should be considered.

Jerry noted that supervisors are not or have not offered flex time as an option for the employee in some cases.

Chuck summarized that release time should be reviewed case by case.

\*\*\* Chuck has requested from the Union a bulleted list of items to be considered before granting release time.

Robin noted that not only do ISD employees want release time but Auditors do too.

Ed noted that we need to also consider a long term approach to new long term projects like 2010.

**Date: 2/3/06**

## **LMC ISD-Sub Committee meeting**

Robin, Bottom line is that regardless of where the money is coming from, we want the release time made available to all not just a few.

### **IV- ISD and ED&T joint training initiative:**

John A commented Northland Facilities is very nice but there is no place to do 1/1 training, example web based, virtual classes or recorded classes away from ones work area.

Stacey noted that ED&T has already thought of this and they are open to suggestions.

Ed H mentioned that based on the class special workstation images may need to be built or additional upgrades of some hardware may also be required.

Stacey commented that DAS has a lab like this at SOT.

John A said we could probably set a few areas up on different floors with very little money.

Tom F suggested that ISD & ED&T investigate this further.

John A said since the in house training of MS Office products has been outsourced; they are no longer tailored for Tax initiatives and are sometimes inadequate for the end user. A possible solution would be for ISD & ED&T to work together to recreate and provide in house training again for Tax employees.

\*\* ED&T & Jim McAndrew will research statistics on each of their respective Training budgets.

Stacey agreed that we need to look for different alternatives for support and training

### **V Contracts for ISD Consultants – establish and monitor knowledge transfer policy.**

John A commented that not all RFP / SOW contracts specifically state that knowledge transfer is required as part of the contract. \*\*We request that it become standard verbiage in all contacts.

Ed H noted that even if there is a clause in the contract for it, it doesn't always happen. After the project completes and the consultant is gone, we are left to support the product without any training and or documentation. The knowledge transfer needs to happen on a day to day basis.

\*\* Jim McAndrew assigned the task of including the knowledge transfer clause into all RFP & SOW's to Frank Tolbard.

Jim McAndrew asks "What if the ISD assignee doesn't GET IT?"

Ed commented that the project mgr or project sponsor and the employee's supervisor need to monitor the process and if there is a lack of understanding then the supervisor needs to make a change in support personnel and not let it go until the contractor is gone and the project is completed.

**Date: 2/3/06**

## **LMC ISD-Sub Committee meeting**

Frank commented that getting the right resources is difficult, and the process is being changed at the front end to help determine the right resources.

\*\* Jim McAndrew requested the union come up with a proposal of how to get the knowledge transfer completed and a process for monitoring it.

Chuck Kumpar concluded the meeting by summarizing the following:

- Minutes to be completed and distributed by 2/17/06 for signed agreement.
- Training request process for ISD shall be consistent with ED&T's process with TRAX.
- WFD release time should be based on classification not on PD or current job duties.
- Release time guidelines to be developed by the union and submitted for review.
- ED&T & ISD will investigate self study labs and alternatives for support and training.
- ED&T & Jim McAndrew will research statistics on their respective Training budgets.
- ISD will submit possible room # to be converted into self study labs.
- Frank to ensure knowledge transfer clause is included in all RTP/SOW.
- Employee's need to request training they need / want using the ED&T form.
- LMC ISD-Sub Committee will meet quarterly.
- Next meeting is scheduled for May 5<sup>th</sup>, 06 at 10 am on the first floor of the Northland building.