

## Memorandum of Agreement

This agreement is between the U.S. Department of Education/Student Financial Assistance (SFA) and the American Federation of Government Employees AFL-CIO, Council 252 (Union), collectively known as the Parties. This agreement is entered into by the Parties pursuant to Article 8 of the Parties Collective Bargaining Agreement (CBA) and sets forth the Parties understanding regarding various issues related to the SFA Scorecard Initiative and the planned Scorecard rollout.

Whereas the parties agree to endorse the SFA Scorecard Initiative and the planned Scorecard rollout the parties recognize that it is to the mutual benefit of all involved to achieve high performance; and

Whereas the parties recognize that to achieve SFA's goals of improving customer satisfaction, improving employee satisfaction and reducing unit costs, requires the inclusion of employees in the development of team goals; and

Whereas 28 teams have been initially identified as "Scorecard teams" who will have the responsibility for creating team goals to improve customer satisfaction, employee satisfaction and reduced unit costs; and,

Whereas it is the goal of SFA for every team to become a "Scorecard team"

### THE PARTIES AGREE THAT:

1. The Scorecard Initiative will be implemented in four waves as follows:

Wave 1: July - August 2001

Wave 2: October - November 2001

Wave 3: December 2001 - January 2002

Wave 4: February - March 2002

2. A phase-in schedule will identify the estimated 75 remaining teams, including team members. Thirty days prior to implementation, Management will provide the Union with a list of specific teams and team members who will be affected.
3. The Parties agree to negotiate prior to SFA's implementation of an award program based upon scorecard team performance.
4. The Parties recognize that an employee's annual performance appraisal is based upon the application of performance standards in their individual performance plan, and therefore, their scorecard team's performance will not by itself be used as the basis for individual performance ratings.
5. The Parties recognize that changes to individual employee performance standards related to their team's scorecard may trigger an obligation to bargain with the Union concerning such changes as contained in law or the Parties' CBA.

6. When scorecards are completed by teams, the scorecards will be forwarded to the Union. Management will review Union concerns and comments and work with scorecard teams to incorporate needed changes. Management will provide the Union with copies of revised scorecards for review.
7. A joint labor-management Implementation Team comprised of an equal number of Union and Management representatives will be created for the sole purpose of monitoring and reviewing the Scorecard implementation process.
8. This agreement will become final seven calendar days after the last signature unless either party notifies the other of its desire to further discuss the issues contained in this agreement.
9. Either party reserves the right to reopen this agreement anytime after one year from the date of this agreement.

Both Parties agree that this MOA addresses only those issues related to the SFA Scorecard Initiative and the planned Scorecard rollout.

For the Union:

For the Employer:

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AFGE, Council 252

\_\_\_\_\_  
Date

\_\_\_\_\_  
SFA

\_\_\_\_\_  
Date