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December 23, 2020

To: Lynn Pallas-Barber, Assistant Director, Clerk Division

From: Debby Szeredy, Executive Vice President

Subject: USPS Plans to Revise Entire Chapter 7 of ELM (Notification No. GCCC20200514)

Please find attached a copy of a letter dated 12/16/2020 from Linda Williams, regarding the above referenced matter.

You are designated as the APWU contact person in this matter. Contact the USPS representative as soon as possible for discussion, if appropriate. Please provide notification of your review to me by 1/18/2021.

Please note: Your secretary should update the Notification Tracking Module in Step 4 CAS as necessary.

Attachment

cc: Vance Zimmerman, Director, Industrial Relations Department
Idowu Balogun, Director, Maintenance Division
Lamont Brooks, Director, Clerk Division
Stephen Brooks, Director, Support Services Division
Michael Foster, Director, MVS Division

DS:jb

LABOR RELATIONS

UNITED STATES POSTAL SERVICE

December 18, 2020

DEC 21 2020

Mr. Mark Dimondstein
President
American Postal Workers
Union, AFL-CIO
1300 L Street, NW
Washington, DC 20005-4128

Dear Mr. Dimondstein:

As a matter of general interest, the Postal Service plans to revise Chapter 7 of the *Employee and Labor Relations Manual* (ELM) in its entirety.

Revisions to Chapter 7 of the ELM incorporates the new *Learning and Development* platform, HERO, which was implemented in 2018 and reflects updates to organizational titles and their areas of responsibilities. Additional changes were made throughout the chapter to clarify existing language, correct grammatical and structural errors, and to update reference materials.

We have enclosed a final draft of the revised *Employee and Labor Relations Manual*, Chapter 7.

Please contact Mera Cole at extension 4870 if you have any questions concerning this matter.

Sincerely,

David E. Mills
Manager
Labor Relations Policies and Programs

Enclosure

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7 Training and Development

DEC 21 2020

710 Overview

711 Policy, Goals, Objectives, and Categories

711.1 Strategy

711.11 General Policy

The Postal Service invests in success by providing systems and resources to meet the training and development needs of the organization and its employees. Broadly stated, Postal Service policy provides employees with training and development opportunities consistent with operational requirements, occupational categories, and technical and functional competencies.

Management Instruction EL-740-2017-5, *Training Development Request Process*, includes information on the purpose, policy and intake process of the Postal Service's Learning and Development group.

711.12 Methods

Employees may pursue opportunities for personal and professional growth through a diverse array of formal and informal learning experiences. Formal training and development systems, including technical training and career and leadership development programs, ensure that employees and select applicants for employment achieve learning objectives in knowledge, skills, and abilities.

Job and other life experiences provide informal learning. These learning opportunities contribute to employees' individual growth and benefit the organization through increased operational performance.

711.13 Responsibility

Each employee, his or her supervisor or manager, and the organization share responsibility for employees' training and development.

711.14 Reasonable Accommodation

According to Section 504 of the Rehabilitation Act of 1973, the

employing office must inform appropriate officials at the National Center for Employee Development (NCED) and the William F. Bolger Center for Leadership Development about employees who may require reasonable accommodation or special attention at the resident training facility.

711.2 Purpose and Goals

The following's purpose and goals include:

a. The training and development function:

(1) Designs, coordinates, organizes, and facilitates learning and development solutions and events.

(2) Supports the workforce acquiring knowledge, skills, and abilities required for effective job performance.

(3) Provides employees with career growth opportunities consistent with Postal Service goals, objectives, and strategies.

b. Training and employee development programs:

(1) Align to corporate goals and business strategies to maximize organizational resources and offer timely, economical, and effective learning solutions throughout the organization.

(2) Support the organization's present and future workforce needs.

(3) Respond to the workforce's training and development needs.

711.3 Objectives

The Postal Service plans training and development activities based on need and demand to enable employees to:

a. Upgrade or maintain proficiency in their current jobs.

b. Acquire job-related knowledge, skills, and abilities after selection for or assignment to a specific position or duty.

c. Learn new Postal Service systems, procedures, or technologies.

d. Develop knowledge, skills, and abilities as part of the succession planning and leadership development process.

e. Obtain and enhance knowledge, skills, and abilities unrelated to their present duties to attain self-determined goals or career objectives.

Training and development activities also keep managers, staff, technical specialists, and others abreast of new ideas, techniques,

and concepts that may apply to Postal Service operations.

711.4 Training and Development Categories

Training and development programs and learning experiences fall under three basic categories:

a. Formal job training.

b. Self-development training.

c. On-the-job experiences, including feedback and coaching.

711.41 Formal Job Training

711.411 Description

Formal job training is training that management requires to:

a. Qualify an employee for presently assigned duties.

b. Improve an employee's performance of assigned duties.

c. Prepare an employee for a future assignment subject to selection procedures.

Formal job training is always compensable for Fair Labor Standards Act (FLSA) nonexempt employees. Salaried exempt employees continue to receive their salary while attending formal job training.

711.412 Conditions

Note the following:

a. For training to be categorized as formal job training, the following conditions must apply:

(1) Management requires attendance at the training.

(2) The training is directly related to the employee's performance in his or her current job or specific future assignment.

b. National training programs include specific enrollment and program completion requirements. Employees who have accepted a position must plan to attend training within 30 days of the Form 50 being processed, and complete the entire program within a 12-month period.

c. Employees who refuse to attend the training, or who attain less than satisfactory performance in the training, may jeopardize their present position or eligibility for qualification or promotion to a specific position or duty.

711.413 Examples

Specific examples of formal job training include:

a. Postal Service new employee orientation held at local

Learning Development and Diversity centers (LDDC).

b. A motor vehicle operator driver training program.

c. A sales and services associate (SSA) financial transaction course conducted at the local level.

d. An electronics technician NCED networking course.

e. An SSA training program for distribution clerks who are the senior bidder for an SSA position.

f. A postmaster course taken in preparation for a specific officer-in-charge assignment.

g. Scheme training for employees in the deferment period established by Article 37 of the USPS-APWU National Agreement when the employee qualifies for and accepts the preferred assignment.

711.42 Self-Development Training

711.421 Description

Self-development training is taken to attain self-determined goals or career objectives, and may or may not directly relate to the employee's current job. This training is non-compensable for FLSA nonexempt employees and must be approved by management in advance if Postal Service resources are to be used. Before approving such training, management should take into account the provisions of 713.1 and 713.2.

711.422 Conditions

For training to be categorized as formal job training, all of the following conditions must apply:

a. The employee's participation is voluntary and self-initiated.

b. The training is not directly related to the employee's job or to a definite future assignment that is subject to satisfactorily completing training or job examination.

c. The employee does not perform productive job-related work during the training.

d. If Postal Service resources are used for the training, management has approved the employee's participation.

Note: Participation may be outside of the employee's regular working hours.

711.423 Job-Relatedness

Requests for self-development training must be assessed individually to determine job-relatedness. If the subject matter of a training program is directly related to an FLSA nonexempt employee's current job or definite future assignment subject to selection requirements, the employee's time spent in training is

considered formal job training subject to the provisions of 711.41 and is compensable under FLSA.

711.424 Examples

Examples of self-development training include:

a. An online course in a second language for a letter carrier.

b. A general equivalency diploma (GED) test preparation program for an SSA.

c. A college seminar on leadership for a secretary.

d. A local fire department certification program in cardiopulmonary resuscitation (CPR) for a mail processor.

711.43 On-the-Job Experiences

711.431 General

On-the-job experiences can contribute significantly to maintaining, improving, or developing employees' knowledge, skills, and abilities.

711.432 Within Current Job Assignment

Learning experiences can be incorporated within the employee's current assignment to increase or enhance the employee's knowledge, skills, and abilities. Examples include:

a. Task force assignments.

b. Committee assignments.

c. Special projects.

d. Assignments that include additional responsibilities or new duties.

e. Tutoring by a technical expert.

f. Special work assignments that focus attention on improving supervisory, managerial, or technical behaviors.

711.433 Outside Current Job Assignment

A productive way to serve both employee and organizational development needs is to temporarily reassign selected employees to work in a position outside their current job and location. Such assignments provide employees with opportunities to learn new and different skills and abilities, and offer the organization an efficient way to draw on employees' technical or managerial expertise. Examples of such assignments include:

a. Assignment to a leadership or staff role on a special task force or project.

b. Temporary assignment to another position within or outside the organization, at the same level or at a lower or higher level.

For more information about temporary assignments, employees should consult Handbook EL-312, *Employment and Placement*, section 716, "Positions Filled Temporarily."

712 Training Compensation Guidelines

712.1 General

Whether time spent in training is compensable depends on:

a. The employee's FLSA status (exempt or nonexempt).

b. The training category (job or self-development).

c. If the training occurs on or off the clock.

Compensable training time policies cover only FLSA nonexempt employees. The application of these concepts is explained in 438.

712.2 FLSA Considerations

712.21 Coverage

Compensable training time includes time spent in actual training and in all related study, practice, and laboratory time permitted by management.

712.22 Scheduling

Unless otherwise specified, all training programs delivered to FLSA nonexempt employees are designed and scheduled to conform to a training day of no more than 8 hours and a training week of no more than 5 consecutive workdays.

712.23 Disclaimer

Nothing in 712 is intended to make training compensable that is not otherwise required to be compensable according to FLSA.

712.24 Management Responsibilities

Management must inform each employee of all factors relevant to the training program that the employee is taking, such as the time allotted for the training, if supplemental training time is not available, and if removing training materials from Postal Service premises is prohibited.

712.25 Employee Responsibilities

Each employee must follow applicable rules and guidelines of training and employee development programs.

713 Selection

713.1 Equal Opportunity Policies

The selection or non-selection of employees for training must not be based on race, color, sex (including pregnancy, sexual orientation, and gender identity, such as transgender status), national origin, religion, age, genetic information, disability, or retaliation for engaging in an EEO-protected activity. As part of its Equal Employment Opportunity program, the Postal Service prohibits discrimination or harassment based on any of these.

In addition, the Postal Service prohibits discrimination or harassment based on marital and parental status; past, present, or future military service; or factors unrelated to merit.

713.2 Selection Considerations

Except as otherwise specified in collective bargaining agreements, selecting individuals for training must be based on:

a. The degree to which an employee's improved performance will benefit the Postal Service by helping to achieve immediate organizational needs.

b. The relative degree of an employee's need for training.

c. The extent to which training is likely to improve an employee's performance.

d. An employee's interest in and efforts to improve work performance.

e. An employee's ability to pass the training onto others upon the employee's return to the job, if appropriate.

f. An employee's career goals and the knowledge and experience required to achieve them.

713.3 Assignment after Training

Unless specifically stated in current directives or a collective bargaining agreement, successfully completing a training or development program does not guarantee promotion or selection to a given vacancy or otherwise mean that the employee will obtain a promotion.

Many learning experiences considered beneficial to the individual and to the organization do not necessarily lead to advancement. These include experiences that may help the employee acquire new or improved behaviors for improving performance in his or her current job.

714 Training Delivery

714.1 General

714.11 Types of Training Delivery

Types of training delivery are:

a. *Postal Training.* Postal Service sources or non-Postal Service sources conduct this training under contract with the Postal Service.

b. *Non-Postal Service Training.* Non-Postal Service sources conduct this training under a tuition or registration fee arrangement that the Postal Service funds in whole or in part.

c. *Other Training.* This is training that non-Postal Service sources conduct with no Postal Service funding or involvement (e.g., training that employees receive on their own initiative during non-duty hours, including as a student at an independent school, college, or trade school).

714.12 Choices of Training Source

714.121 Considerations

The Postal Service provides most employee training in-house. Managers may choose to use a non-Postal Service training source only if this choice is justified after considering:

a. Need for, cost, and benefits of such training.

b. Training available within the Postal Service.

714.122 Justification

To comply with Postal Service training requirements, if a cost is associated with the training, an eBuy requisition must be approved for training that non-Postal Service vendors and contractors deliver.

The employee, supervisor, or manager submits an eBuy requisition and must include the manager of Learning Development and Diversity (MLDD) in the approval process if the employee is from the district.

The MLDD will ensure that the employee's selection is consistent with published training policies and that training prerequisites have been met.

714.2 Postal Service Training Delivery

714.21 Delivery Modes

Training may be delivered:

a. In person in an instructor-led classroom setting. In person Postal Service training is delivered at:

(1) Postal Service national training centers,

(2) Local facilities,

(3) Headquarters, or

(4) Alternative training sites.

b. Virtually via online conferencing software.

c. Online through HERO as web-based training.

d. Through a combination of delivery modalities.

714.22 Information about Delivery Sources

Information about official Learning and Development training program delivery sources is communicated through multiple vehicles, including:

a. The Postal Service intranet (Blue).

b. Regular communication channels at Headquarters.

c. Targeted communication campaigns, including the Learning News and Notification newsletter and the monthly MLDD webinar.

714.221 Headquarters

The Learning and Development Department at Headquarters is the official source for formal, enterprise-wide training and is responsible for delivering quality training that improves the employee experience, meets the organization's needs, and safeguards USPS resources. All USPS training products and services must adhere to quality standards and support the Postal Service's strategic plan and mission.

714.222 Areas, Districts, and Plants

Areas, districts, and plants may administer local training and other training as authorized in 721.2 and 721.3.

714.223 National Center for Employee Development

NCED administers Postal Service technical maintenance programs for bargaining and nonbargaining unit employees and coordinates the delivery of nationally developed training programs for supervisors, managers, and postmasters. NCED also provides facilities for Postal Service meetings and conferences.

714.224 William F. Bolger Center for Leadership Development

The William F. Bolger Center for Leadership Development (also known as the Bolger Center) provides facilities and support for national leadership programs and technical training, as well as a venue for strategic meetings and conferences.

714.225 Strategic Learning Initiatives

The Office of Inspector General (OIG) and the Postal Inspection

Service have established the Joint Mission Support Center to leverage the strength of some of their administrative and support functions. Strategic Learning Services, a component of the center, administers training programs for inspectors, police officers, OIG special agents, and the technical and administrative support staff of both agencies.

714.3 Non-Postal Service Training Delivery

Non-Postal Service training delivery sources include:

a. Other government agencies.

b. Colleges, universities, and vocational schools.

c. Other non-Postal Service organizations and vendors.

715 Postal Training Systems

715.1 Explanation

Postal Service training systems are designed for specific Postal Service employee categories (e.g., craft, technical, professional, supervisory, managerial, and executive). Individual courses within these training systems are described in Learning and Development web pages, Postal Service learning portals, and literature about specific training programs.

715.2 Postal Orientation

An orientation program is required at all levels for new career employees on their first day of official duty.

715.3 Craft Skills Training

Craft skills training is usually provided before an employee is required to perform duties under routine supervision.

Craft skills training is required for:

a. Newly appointed career craft employees.

b. Current career employees transferred to a different craft.

c. Craft employees given new duties within the scope of their assignments at management's direction.

715.4 Technical Maintenance Training

715.41 General

Technical maintenance skills training is required for employees assigned to, or selected for, specific maintenance positions and duties.

715.42 Subjects

The technical maintenance curriculum covers both fundamental and

specialized knowledge and skills related to maintaining Postal Service buildings, equipment, and systems.

715.43 Delivery

The location and method of delivery depends on the type of maintenance training. For example:

a. Some maintenance courses and on-the-job training are delivered locally.

b. The majority of maintenance courses are taught in combined classroom and laboratory courses at NCED.

Note: Local management and the MLDD are responsible for ensuring that an employee has taken and passed prerequisite training before enrolling in courses at NCED.

c. Vendors and vocational or technical schools (subject to an approved eBuy requisition) may also deliver maintenance training when Postal Service training is not available.

715.5 Management and Professional Training

715.51 General

The Bolger Center and NCED provide Postal Service professionals, specialists, supervisors, managers, and executives with facilities and support for training and development activities.

715.52 Enrollment and Curriculum Guides

Individual program requirements drive course enrollment, which is accomplished through various methods, including training administration enrollment systems. Curriculum guides are available from multiple sources, including:

a. Learning and Development and NCED intranet sites.

b. Publications that support strategic programs.

c. Literature about specific training programs.

715.53 Leadership Development

Selected experienced Postal Service managers receive opportunities to participate in leadership programs designed to improve and expand their performance in current and future positions.

715.54 Other

To enhance and maintain professional competence, the Postal Service provides other general and specialized training as needed for management and professional personnel. USPS uses both internal and external sources.

715.6 Inspection Service Training

715.61 General

The Postal Service requires initial and in-service training for Postal Service inspectors, police officers, and OIG special agents. The Career Development Unit develops and administers training for Inspection Service personnel (see 714.225).

715.62 Inspectors

Initial training for newly appointed inspectors is an extensive program of resident training combined with field instruction. In-service resident training courses, supplemented by online and correspondence programs, are provided as needed to incumbent Postal Service inspectors and professional, technical, and administrative support staff.

715.63 Postal Police Officers

Newly appointed Postal Service police officers receive a program of resident training combined with field instruction. Incumbent Postal Service police officers are field trained as needed.

716 Expenses

716.1 Travel

716.11 General

The Postal Service pays necessary travel expenses (transportation, lodging, and per diem) in accordance with Handbook F-15, *Travel and Relocation*, to compensate employees for costs directly related to authorized off-site training and development activities. To request reimbursement of regular and local travel expenses, employees must use the Postal Service's eTravel system (*https://blue.usps.gov/accounting/travel/etravel.htm)* to submit expense reports. eTravel can be accessed directly online or through the Postal Service's *travelhelp* website at *https://blue.usps.gov/travelhelp.*

Employees must select "Travel for Training" as the purpose of travel when completing the expense report.

716.12 Intermediate Travel Home

716.121 General

During extended training sessions, employees may make one or more intermediate weekend return trips to their permanent duty station in accordance with the following rule:

Duration of Training	Number of Trips
3 weeks or less	0
More than 3 weeks and up to 6 weeks	1
More than 6 weeks and up to 9 weeks	2

More than 9 weeks and up to 12 weeks	3

A weekend return trip is authorized only to the employee's permanent duty station. The employee's manager must authorize in advance travel to another location. The employee pays any cost differential in travel between the employee's permanent duty station and the alternate approved location.

716.122 Scheduling

Each employee who is scheduled to take a course lasting more than 3 weeks receives weekend travel scheduling information.

716.123 Trip Destination

Managers are permitted to authorize a weekend return trip only to the employee's permanent duty station or to a pre-authorized, approved location.

716.124 Spouse Traveling in Lieu of Employee

In accordance with Handbook F-15, *Travel and Relocation*, the Postal Service will pay the round-trip fare of the employee's spouse to travel to the employee's training site instead of the employee taking an intermediate trip home.

716.2 Facilities

When available and adequate, Postal Service facilities are to be used for Postal Service training. If they are not available, training facility managers should consider using available facilities of other government agencies, including the military service. Based on local availability of a training site, training facility managers have the authority to assign students during training to either lodging that the Postal Service owns or leases or to commercial lodging.

716.3 Tuition, Fees, Books, and Supplies

The Postal Service pays approved expenses for tuition, fees, books, and supplies for authorized training (see 740).

716.4 Injury Compensation

The Postal Service charges to the employee's home office time that the employee lost from work or training because of any injuries that the employee suffered during resident Postal Service training.

717 Non-Postal Service Personnel Participation in Postal Training

Postal Service training may be provided to non-Postal Service personnel under the following circumstances:

a. *If Conducted at Contract Stations with Approval.* Retail services training may be provided to personnel at contract stations if

approved by the district manager or another installation head in coordination with the LDDC.

b. *If the Director of Learning and Development Approves.* The director of Learning and Development must approve all other non-Postal Service personnel participation in Postal Service training.

c. *If It Makes a Long-Term Positive Impact.* The training leads to non-Postal Service personnel continuing throughout their careers to learn and improve their knowledge, skills, and abilities while they share what they have learned with other employees.

720 Training and Development Responsibilities and Functions

721 Organizational Responsibilities and Functions

721.1 Headquarters

The chief Human Resources officer (CHRO) is responsible for Postal Service training and development systems. This responsibility includes:

a. Analyzing training requests and designing, developing, validating, delivering, and evaluating national Postal Service training and development programs.

b. Developing policies, including pay practices, which are applicable to structured employee development programs for specific populations or functional groups, such as career-ladder programs and management, professional, and specialist training programs.

c. Providing information on specific occupations to craft and other employees for career planning and decision-making purposes.

d. Analyzing the career needs of specific populations to design and provide programs tailored to improve their knowledge, skills, and abilities.

e. Facilitating between Headquarters and field-training professionals.

f. Standardizing and supporting the LDDC physical and technological infrastructure.

g. Providing corporate leadership programs for managers and executives.

h. Providing tuition reimbursement.

i. Supporting Corporate Succession Planning (CSP) and Executive and Administrative Schedule (EAS) Leadership Development programs for the organization.

j. Providing Individual Development Planning (IDP) processes.

721.2 **Areas**

The area Human Resources function is responsible for administering training and development policies and for training area personnel. These responsibilities include:

a. Supervising the development and implementation of an area training and development planning system.

b. Facilitating the flow of information and recommendations between Headquarters and the districts about existing training and development policy, efforts, and future needs.

c. Strengthening the ability of district training and development professionals to:

(1) Understand policy and contribute to policy development.

(2) Administer national programs.

(3) Respond to local needs.

d. Monitoring districts' compliance with Equal Employment Opportunity laws by ensuring that talented individuals are being developed in a fair and equitable manner without regard to race, color, sex, age, national origin, religion, mental or physical disability, military service, or genetic information.

e. Monitoring districts' compliance to placing special emphasis on providing training opportunities to employees with targeted disabilities.

f. Increasing management commitment to training and development and to improving the work environment.

721.3 **Districts**

District managers, plant managers, and other installation heads are responsible for their employees' training and development and for ensuring that it is consistent with corporate business goals and strategic plans. District training responsibilities and functions include:

a. Establishing training and development units within national guidelines.

b. Implementing training and development staffing criteria within national guidelines.

c. Establishing and implementing training and development space allocations according to Handbook AS-504, *Space Requirements.*

d. Ensuring that the objective, length, and content of national training courses taught locally are not changed without the prior approval of Learning and Development at Headquarters.

e. Making certain that employees use electronic training databases appropriately.

f. Monitoring training to ensure that it complies with national training and development policies.

g. Establishing and implementing other measures to ensure that employee training and development meet the organization's requirements.

h. Coordinating district training requirements with Learning and Development at Headquarters.

i. Developing, or acquiring, and coordinating, or delivering district training in accordance with established guidelines.

j. Ensuring that talented individuals are being developed in a fair and equitable manner without regard to race, color, sex, age, national origin, religion, mental or physical disability, military service, or genetic information.

k. Placing special emphasis on providing training opportunities to employees with targeted disabilities.

721.4 **Supervisors and Managers**

Supervisors and managers are responsible and accountable for:

a. Ensuring that employees under their supervision are trained in a timely manner to perform their assigned job tasks.

b. Identifying employees' needs for improvement in their present jobs.

c. Planning for their employees' training, in coordination with training systems available for their facilities.

d. Following up after employees complete formal job training to ensure that they use newly acquired knowledge, skills, and abilities optimally and appropriately.

e. Identifying and providing other training to meet the organization's and individual employees' needs.

f. Evaluating and supporting as appropriate employee requests to participate in self-development training opportunities.

g. Providing employees with information and guidance on career growth.

h. Documenting the outcomes and expectations of providing training, including the return on investment.

721.5 **Employees**

Employees are responsible for:

a. Making effective use of training opportunities that management provides.

b. Consulting with their supervisors and pursuing personal career goals to guide their own growth and development.

c. Continuing throughout their careers to learn and improve their knowledge, skills, and abilities while sharing what they have learned with other employees.

722 Learning Development and Diversity Center – Organization and Operations

722.1 Purpose

The LDDC includes district field units that provide area-wide training and development support services to all Postal Service employees. The primary mission of the LDDC is to foster improved employee job performance and to provide guidance to help employees pursue career growth and self-development goals.

722.2 LDDC Network Operating Procedures

722.21 Geographic Area of Responsibility

District Human Resources managers ensure that all field Postal Service facilities within a geographic area and performance cluster are the responsibility of a specific LDDC office. This includes Postal Service facilities with unique purposes, such as Headquarters field units.

722.22 LDDC Reporting Relationships

LDDC reporting relationships are as follows:

a. The area Learning Development and Diversity specialist (LDDS) serves as a liaison with Headquarters staff for the district MLDD. Both the LDDS and MLDD interact periodically with HQ Learning and Development staff.

b. The MLDD reports directly to the district Human Resources manager.

c. The Human Resources specialist assigned to the training function at the district level reports functionally and administratively to the MLDD.

722.23 Facilities

The following guidelines apply to allocating facility space at LDDC offices:

a. District Human Resources managers are authorized to establish and abolish LDDC facilities and to determine their number and locations within their districts.

b. Changes that are made in the LDDC network must be communicated to Headquarters so that records and distribution lists can be revised in a timely manner.

c. Handbook AS-504, *Space Requirements,* specifies space allocations for LDDC facilities.

d. Districts may establish space for training at non-LDDC sites as required to satisfy intermittent, small-scale training requirements when it is not cost effective to conduct training in an LDDC office.

722.24 **Reviews**

Headquarters may conduct periodic reviews of LDDC locations. Area or district leadership will select members of the review team.

730 Training Procedures

731 Nomination and Registration

Individual program requirements drive nomination procedures. For example, the Postal Service uses an exclusive nomination process, which Headquarters and field liaisons oversee, to identify participants for enrollment in formal leadership development programs.

Employees can register for various programs and courses in a variety of ways, sometimes using training administration enrollment systems. They can obtain curriculum guides from multiple sources, including:

a. Publications supporting strategic programs.

b. Literature about specific training programs.

c. Intranet sites, such as those for Employee Resource Management, Learning and Development, and the National Center for Employee Development.

732 Training Records and Reports

732.1 Individual Training Records

732.11 Training Tracking System

Postal Service training for all employees must be documented and maintained in Cornerstone OnDemand HERO as the system of record.

732.12 PS Form 2432, *Individual Training Progress Report*

The employee must record on PS Form 2432, *Individual Training Progress Report,* the training hours that are to be entered manually into HERO, as the system of record.

732.13 PS Form 2548, *Individual Training Record*

New employee training must be recorded on PS Form 2548, *Individual Training Record.* The training agent (the LDDS or the

employee's job instructor) and the immediate supervisor complete PS Form 2548. The LDDS retains the form at a central location, which the training supervisor or manager determines.

732.14 eBuy Requisition

When costs are associated with Postal Service and non-Postal Service training, an eBuy requisition must be completed to request, approve, and finance the training.

732.2 Training Tracking System

All training that the Postal Service sponsors must be recorded in the appropriate electronic database. Information about these databases can be obtained from the Headquarters Learning and Development Department.

740 External Training Policy

741 Background

741.1 Introduction

The Postal Service values its employees' education as important to overall corporate success. The organization's funding external training opportunities enables its officers to develop and financially support high-potential Postal Service employees in their pursuit of professional certifications, individual college courses, and degree programs.

This subchapter covers the Postal Service policy for external training, which includes non-Postal Service training (NPT) and the Centralized Funding for Development (CFD) Scholarship. For information on applicant eligibility for external training, refer to the *Resource Guide for External Training*, located under *Non-Postal Training* (NPT) on *External Training* at *https://blue.usps.gov/hr/training-development/external-training.htm*.

Documents pertaining to this section are subject to updates. For current documents, reference *External Training above.* Employees are responsible for reviewing the details in all documents associated with their training packets.

Note: Training that external sources provide under contract with the Postal Service falls within the definition of Postal Service training.

741.2 Approval Restrictions

Restrictions include the following:

a. External training is not an obligation of the Postal Service, nor is it an employee right that the Postal Service pay for external training.

b. The Postal Service may pay for external training when the chief Human Resources officer (CHRO) or an appointed designee approves the training in advance.

741.3 Prohibited Training Vendors

The Postal Service does not pay external training costs for a training vendor that commits one or more of the following:

a. Discriminates because of race, color, religion, sex, age, national origin, physical or mental disability, military service, or genetic information;

b. Engages in lobbying for and supporting political campaigns as a substantial part of its activities; or

c. Is a college or university that does not have accreditation from one of the accrediting bodies that the U.S. Department of Education recognizes.

742 General Procedures

742.1 Request and Approval

All requests for external training must follow the approval chain identified in the application. Application forms for the CFD Scholarship and non-Postal training are available on *External Training* at https://blue.usps.gov/hr/training-development/external-training.htm.

Note: The application forms are subject to change.

742.2 Payment Process

The payment process for external training is as follows:

a. Employees must use their individual government travel card, accompanied by an approved eBuy, to pay for external training. For more information on this process, visit *External Training* at https://blue.usps.gov/hr/training-development/external-training.htm. Employees must confirm eBuy final approval status before enrolling or participating in an external training event. All eBuy requests are subject to Postal Service eBuy policies.

b. The Postal Service reimburses payments through eTravel (https://blue.usps.gov/accounting/travel.etravel.htm), the Postal Service's online application to create, submit, and approve official business travel expense reports for reimbursement. eTravel can be accessed online directly or through the Postal Service's *travelhelp* website at

https://blue.usps.gov/travelhelp.

c. To fund non-Postal Service training, employees must provide their finance number in the eBuy request under "Bill to." See the *Resource Guide for External Training* for more information.

d. Human Resources provides CFD scholarships through a central fund. The maximum award amount is $15,000 per fiscal year.

742.3 Reimbursement to Employees

Employees who paid for an approved external training request out of their own funds may be eligible for reimbursement through the Postal Service's eTravel online process, subject to the Postal Service verifying their expenses.

For additional information or to access eTravel, visit https://blue.usps.gov/accounting/travel/etravel.htm, or see *eTravel* on the Postal Service's *travelhelp* website at https://blue.usps.gov/travelhelp.

742.4 Travel

Approved travel expenses (transportation, lodging, and per diem) for participation in external training are reimbursed using the Postal Service's online eTravel system, as authorized in Handbook F-15, *Travel and Relocation.*

742.5 Documentation

Upon completing training, participating employees must submit documentation verifying achievement of external training. Documentation includes the employee's training certification copies and grade reports, which must be emailed to the NPT and CFD mailbox at nptandcfd@usps.gov.

743 Roles and Responsibilities

743.1 General

This section provides information about the roles and responsibilities of employees and managers regarding external training.

743.2 Employee

Employees' responsibilities include the following:

a. Having a career conversation with their manager.

b. Developing a HEROProfile in accordance with guidelines provided in the *Resource Guide for External Training.*

c. Adding the training to a development plan documented in HERO, the Postal Service's online training and career development platform.

d. Completing and advancing all required documents.

e. Maintaining passing grades.

f. Submitting course completion documentation.

g. Fulfilling any required service commitment following training.

743.3 Direct-Reporting Manager

The employee's direct-reporting manager is responsible for the following:

a. Documenting in HERO a career conversation with the requesting employee.

b. Verifying the requested training is added to a development plan in HERO.

c. If the request is approved, completing and advancing all required documents.

d. If the request is denied, communicating the reason to the applicant.

e. Retaining documents for reference.

f. Notifying the director of Learning and Development (via the NPT and CFD mailbox at nptandcfd@usps.gov) of any events of which the manager becomes aware that might trigger an employee's responsibility to reimburse the Postal Service for training costs.

743.4 Sponsoring Officer

The officer sponsoring the employee has the following responsibilities:

a. If the request is approved, completing and advancing the application to the NPT and CFD mailbox at nptandcfd@usps.gov.

b. If the request is denied, communicating the reason to the applicant's direct-reporting manager.

c. Notifying the director of Learning and Development (via the NPT and CFD mailbox at nptandcfd@usps.gov) of any events of which the officer becomes aware that might trigger an employee's responsibility to reimburse the Postal Service for training costs.

743.5 Centralized Funding for Development (CFD) Review Panel (for CFD Requests Only)

The Centralized Funding for Development (CFD) review panel reviews and evaluates requests for CFD scholarships and recommends to the CHRO or appointed designee award amounts.

743.6 CHRO or Appointed Designee

The chief Human Resources officer (CHRO) or appointed designee reviews the CFD review panel's recommendations of CFD scholarship award amounts and makes the final decision on the amounts to be awarded.

743.7 Director, Learning and Development

The responsibilities of the director of Learning and Development are the following:

a. Maintaining external training records for the CHRO.

b. Serving as coordinator for external training.

c. Receiving and validating all external training applications.

d. Forwarding approved Continued Service Agreement accountable information to the HR Shared Services Center (HRSSC) for entry into the Human Capital Enterprise System (HCES).

743.8 Area and Headquarters

Areas' and Headquarters' liaisons must submit quarterly to the director of Learning and Development (via the NPT and CFD mailbox at nptandcfd@usps.gov) a list of employees who have been approved for external training, as well as a list of employees who have completed approved external training during that quarter. The report must include the following for each employee:

a. The employee's name, EIN, and title.

b. The college, university, or company where the employee will undergo or has completed external training.

c. The training program, course level, or course title.

d. The training start date, and also the completion date if applicable.

e. Current and cumulative expenditures related to the training.

744 External Training Requirements

744.1 Minimum Grade Requirement

A grade of B or higher, or a grade of pass in a pass/fail course, is required for all courses.

744.2 Continued Service Agreement and Certification

Employees who enroll in external training programs with a cumulative cost of $5,000 or more must complete and submit a Continued Service Agreement (CSA), which must be sent to the NPT and CFD mailbox (nptandcfd@usps.gov). The Continued Service Agreement form (with digital signature) is available online at *External Training* (*https://blue.usps.gov/hr/training-development/external-training.htm*) by clicking on *Non-Postal*

Training or *Centralized Funding for Development (CFD) Scholarship* on that Web page.

Note: Employees who complete more than 5 external training courses within 3 consecutive years will be considered to be working toward completing an academic degree and will be required to complete a CSA if the total expenditure for the training is $5,000 or more.

744.3 Period of Commitment

Employees may be required to fulfill a certain period of service following their completion of external training. The commitment period begins immediately upon the completion of training.

Note: The status of employees who enroll in an executive-level graduate program (e.g., the Sloan Fellows Program) changes to "Executive in Training" upon enrollment. This becomes the participant's work assignment and governs the terms and conditions of employment. A Sloan Fellow is responsible for reimbursing the Postal Service in accordance with the terms of his or her CSA if he or she does not complete the requisite year(s) of service.

744.4 Reimbursement to the Postal Service

744.41 Events that Trigger Reimbursement

The following events trigger an employee's responsibility to reimburse the Postal Service for expenses that USPS incurred in connection with a training program, in accordance with, and unless specifically exempted by, the provisions of any related executed CSA:

a. An employee fails to enroll in approved training or fails to complete initiated training successfully, as specified in 744.5

b. An employee voluntarily leaves the Postal Service for any reason other than non-career military service (including but not limited to regular retirement or involuntary termination) prior to completing the service that he or she agreed to in a training CSA.

744.42 Written Notification of Reimbursement Obligation

For notice purposes, the employee's supervisor or sponsoring officer shall provide written notification to the director of Learning and Development (via the NPT and CFD mailbox at nptandcfd@usps.gov) of the employee's separation from the Postal Service or other event triggering the employee's obligation to reimburse USPS for external training costs that the Postal Service incurred on the employee's behalf.

The supervisor or officer may include a recommendation for the

CHRO's potential consideration as to whether:

a. The employee should be required to reimburse the Postal Service; or

b. Reimbursement should be waived in whole or part because recovery of the money would be contrary to equity, good conscience, or public interest.

744.43 CHRO Determines Action

The CHRO, or appointed designee, determines appropriate action on the employee's reimbursement obligation. If the CHRO or designee decides to require reimbursement, Learning and Development notifies the Eagan Accounting Service Center (ASC) of the amount due by submitting PS Form 1902, *Justification for Billing Accounts Receivable.* The Eagan ASC bills the employee and collects the funds due to the Postal Service.

744.5 Failure to Enroll in or Complete Approved Training

Employees who fail to enroll in, maintain minimum grades in, or successfully complete approved training for reasons that are unacceptable to the CHRO or appointed designee may be required to:

a. Pay any cancellation fee that the training sponsor requires; and

b. Reimburse the Postal Service for full costs or liabilities incurred for tuition, fees, books, supplies, transportation, and per diem (except salary) unless the employee failed to enroll in or complete approved training because the employee was performing non-career military service. In that case, the Postal Service may not request reimbursement of any costs or liabilities incurred.

744.6 Double Payment Policy

The Postal Service reduces the amount provided for training by any amount that an employee receives from other sources for the same purpose, including payments received under the Government Issued (GI) Bill and other governmental education assistance programs.

Thus, the Postal Service will seek reimbursement for any training costs that the Postal Service previously paid, but for which an employee later receives payment from another source, such as scholarships or recruiting incentives from competing employers.

750 Professional Associations

751 Definition

751.1 Purpose

For purposes of this subchapter, the term "Professional Association" is used in its broadest meaning to include nonprofit, cooperative, and voluntary organizations of individuals having a common background in a professional, technical, or managerial field of work requiring knowledge, skills, and abilities usually acquired only through extensive training or education. Academic credentials, an accrediting examination, or a license may be prerequisites for membership.

The main purposes of a professional association may include:

a. Exchanging information among members about new or improved developments or applications within the field of work.

b. Establishing and revising standards of preparation and experience for acceptance into the field.

c. Developing and publishing standards of professional performance and responsibility.

d. Furthering the career development of members.

751.2 Membership

A professional association may include members of several professions or disciplines.

751.3 Exclusions

For purposes of this subchapter, the term professional association does not include a recognized labor, supervisory, or other managerial organization, as defined in the Postal Reorganization Act.

752 Policy

The Postal Service encourages employees to join and participate in recognized professional associations in a manner that is consistent with prioritizing the duties and responsibilities of their positions. Active participation can be a valuable experience, both in improving employees' performance in their present positions and in preparing them for greater responsibility in the profession. Through conferences, symposia, and committee assignments, employees are able to expand their expertise.

Incentive for exemplary work performance can result from employee recognition gained through the employee publishing journal articles, receiving awards for professional achievement, holding office in recognized professional associations, and speaking or presenting

papers at association meetings. Professional recognition of Postal Service employees for their competence also increases public confidence in the Postal Service.

The following rules apply:

a. Employees may not receive compensation from any source other than the government for teaching, speaking, or writing that relates to the employee's official duties.

b. Employees engaged in teaching, speaking, or writing as outside employment or as an outside activity must not use or permit the use of their official Postal Service title or position to identify them in connection with their teaching, speaking, or writing activity or to promote any book, seminar, course, program, or similar undertaking, except as approved by a Postal Service ethics official.

c. Although general membership and participation in outside professional associations may be appropriate, federal law does not permit employees to sit on an outside board in their official Postal Service capacity or to participate in any outside activity that conflicts with their official duties unless they have received prior authorization from the general counsel.

753 Payment of Membership Dues or Fees

753.1 Individual Memberships

753.11 Voluntary

Postal Service funds are authorized for paying voluntary individual memberships, dues, and fees in professional associations, provided all of the following conditions are met:

a. The Postal Service does not have or cannot obtain an institutional membership in the professional association.

b. The employee requesting the individual membership is in an FLSA-exempt position with a level of EAS-17 or above.

c. The nature of the professional association is directly related to the employee's job.

d. The employee's Postal Career Executive Services (PCES) executive approves the request and authorizes the payment after determining that the employee's participation will benefit the Postal Service and that funds are available.

e. Payment is limited to one individual membership per employee per year.

f. Payment is not approved solely for the purpose of obtaining reduced fees for continuing education or for related purposes, such as attendance at periodic meetings and conferences.

753.12 Required

If the Postal Service requires nonbargaining employees to maintain a professional license, certification, or membership (for example, a license to practice law or medicine), Postal Service funds may be used, at the discretion of the appropriate officer, to reimburse such employees for the basic dues or fees they pay to satisfy such requirements. Employees submit requests for reimbursement on PS Form 7381, *Requisition for Supplies, Services, or Equipment*.

The organization submits an authorization request through eBuy and charges the basic dues or fees to its purchase card.

753.2 Institutional Membership

The policy restricting payment of individual membership dues and fees does not preclude Postal Service institutional membership in professional associations. Vice presidents are authorized to define and approve institutional memberships for specific functional areas and organizational units reporting to them.

753.3 Membership Procurement

The vice president of Supply Management is responsible for procuring memberships that cost more than $10,000. In certain cases, the vice president may also procure memberships that cost less than $10,000 if they require a written contract to reflect the benefits, obligations, and responsibilities associated with the membership. An approved eBuy requisition must include either:

a. The name or position title of the individuals designated to represent the Postal Service.

b. The total number of individuals included in the membership.

753.4 Periodicals

The Postal Service authorizes funds for subscriptions to professional association periodicals for both the library and individuals designated by name or position title to represent the Postal Service in institutional memberships.

754 Attendance at Meetings and Conferences

754.1 Authorization

Employees may be authorized to attend meetings and conferences of a professional association at Postal Service expense in either of the following cases:

a. Attendance is for training purposes as defined in 740.

b. Attendance is related to the job or function in which the employee is employed and is expected to contribute to the employee's improved performance.

754.2 **Full or Partial Attendance**

When authorized under 754.1, time in actual attendance at a professional meeting or conference is considered to be official business for compensation purposes, and leave is not charged to the employee. However, managers should review the program schedule or agenda and authorize official attendance only for that portion of the meeting or conference that meets the criteria in 754.1.

Exception: Employees may be authorized to attend the entire meeting or convention in any of the following cases:

a. The employee is scheduled to make a speech, present a paper, or conduct or chair a meeting session.

b. The employee has been nominated or previously elected as an officer of the professional association.

c. The employee has been designated as an official representative of the Postal Service.

If authority is granted for attendance at only a portion of a meeting or convention, the employee may request annual leave to attend the unapproved portions, and if leave is granted, the employee must pay the expenses for those unapproved portions.

754.3 **Leave for Other Employees**

Managers are encouraged to be liberal in approving annual leave (consistent with work priorities) for other employees who desire to attend a professional association meeting or convention at their own expense.

754.4 **Selection for Attendance**

When several employees in the same organizational unit are in the same profession, the manager chooses which employees, if any, may attend the professional meeting or convention. The criteria for the selection of employees for training, listed in 713, may be applied.

754.5 **Payment of Expenses**

Handbook F-15, *Travel and Relocation*, describes the conditions for payment of registration fees, travel, and subsistence costs for employees authorized to attend meetings or conventions at Postal Service expense.

754.6 **Approval of Registration Fees**

An eBuy requisition must be approved before the Postal Service will pay registration fees or expenses other than travel or per diem. (See 732.13 on preparing an eBuy requisition.)

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