

MATRIXED STAFFING PROCESS

Writing in Red denotes a change in the process from 1 category to the next.

	10% to 49%	50% or More	Service Provider
Definition	Employee who supports a work unit 10% to 49% of the year is matrixed to a department or group. Management of the employee resides with Home Unit Manager (HUM). <i>Employees who provide an ongoing service to a department or group on a continual basis should use a Service Level Agreement for such activities.</i>	Employee who supports a work unit 50% or more of the year is matrixed to a department or group. Management of the employee resides with Home Unit Manager (HUM). <i>Employees who provide an ongoing service to a department or group on a continual basis should use a Service Level Agreement for such activities.</i>	Employees who provide service to internal customers where day-to-day work is directed and assigned by HUM. Internal customers assist in determining priorities and pay for such services.
Coordination/Agreement of Assignment	Work Unit Manager (WUM) must complete the <i>Matrixed/Service Provider Form</i> that defines length of assignment, scope of work, charge code(s) to be used, and expected results to be achieved by employee. HUM & WUM must agree on assignment & duration. HUM & WUM communicate information to employee, which includes work objectives, charge codes & expectations.	WUM must complete <i>Matrixed/Service Provider Form</i> that defines length of assignment, scope of work, charge code(s) to be used, and expected results to be achieved by employee. HUM & WUM must agree on assignment & duration. HUM & WUM communicate information to employee, which includes work objectives, charge codes & expectations.	WUM (Customer) must complete Service Level Agreement (SLA) Form that defines length of assignment scope of work, charge code(s) to be used, and expected results to be achieved by group. HUM & WUM (Customer) must agree on assignment and duration. HUM & WUM (Customer) communicate information to those employees, which includes work objectives, charge codes & expectations. SLA negotiated annually through AWP.
Manager Responsibility	All management responsibilities reside with the HUM. When an employee is matrixed out to a work unit, management direction of the project is provided by the WUM.	Management responsibilities reside primarily with HUM. Both HUM & WUM are expected to coordinate management responsibilities as appropriate when an employee is matrixed. WUM approves time charged to the project. When an employee is matrixed out to a work unit, management direction of the project is provided by the WUM.	Management responsibilities reside primarily with HUM. Both HUM & WUM (Customer) are expected to coordinate management responsibilities as appropriate. HUM provides communication to the employee of assignments and expectations. HUM monitors work progress with regards to the assignment and provides feedback to the employee.
Location	Physical location of work assignment to be agreed upon among all parties.	Physical location of work assignment to be agreed upon among all parties.	Physical location of work assignment to be agreed upon among all parties.
Administrative Tasks	HUM approves timesheets, vacation and sick leave requests. During matrixed period, time off requests for one week or more are reviewed by HUM & WUM to ensure resources are available to cover critical needs. HUM provides final communication to the employee.	HUM approves timesheets, vacation and sick leave requests when employee is not matrixed out to another group. During matrixed period, time off requests for one week or more are reviewed by HUM & WUM to ensure resources are available to cover critical needs. WUM provides final communication to the employee if employee is actively matrixed out during requested time off. It is the employee's responsibility to notify both WUM & HUM of time off requests.	HUM approves timesheets, vacation, and sick leave requests. HUM & employee communicate to WUM (Customer) when time off exceeds 1 week or more to ensure resources are available to address critical needs.
	Job-related training will be approved by the manager who requires the employee to be trained. For example, if the training is purely for professional development, the HUM would approve and fund the training as well as pay for the time the employee is in training. If the training is required by a WUM so the employee can better perform a task required by the WUM, the WUM will approve and fund the training as well as pay for the time the employee is in training.	Job-related training will be approved by the manager who requires the employee to be trained. For example, if the training is purely for professional development, the HUM would approve and fund the training as well as pay for the time the employee is in training. If the training is required by a WUM so the employee can better perform a task required by the WUM, the WUM will approve and fund the training as well as pay for the time the employee is in training.	Job-related training will be approved by the manager who requires the employee to be trained. For example, if the training is purely for professional development, the HUM would approve and fund the training as well as pay for the time the employee is in training. If the training is required by a WUM so the employee can better perform a task required by the WUM, the WUM will approve and fund the training as well as pay for the time the employee is in training.
	Travel requests require the approval of the manager who is funding it. Employee must submit a notification of business travel via email to both HUM & WUM. The work unit paying for the travel provides final communication to the employee.	Travel requests require the approval of the manager who is funding it. Employee must submit a notification of business travel via email to both HUM & WUM. The work unit paying for the travel provides final communication to the employee.	Travel requests require the approval of the manager who is funding it. Employee must submit a notification of business travel via email to both HUM & WUM. The work unit paying for the travel provides final communication to the employee.
Assignment Completion	Once assignment has been completed, matrixed employee will return to Home Unit.	Once assignment has been completed, matrixed employee will return to Home Unit.	Upon completion of the Service Level Agreement, the employee will be reassigned to the HUM 100% until another SLA is established.
Shared Support	Employee is accountable for attending home unit and work unit meetings when matrixed. This will be decided upon between the HUM & WUM during initial work agreement.	Employee is accountable for attending home unit and work unit meetings when matrixed. This will be decided upon between the HUM & WUM during initial work agreement.	Employee is accountable for attending home unit & WUM (Customer) meetings as needed. This will be decided upon between HUM, WUM (Customer), and employee during work agreement
Performance Review/Merit Increase	HUM coordinates employee's overall performance with work unit manager(s).	HUM coordinates employee's overall performance with work unit manager(s).	HUM coordinates employee's overall performance with WUM (Customer).
	HUM writes measurable performance objectives for employees that pertain to professional development.	HUM writes measurable performance objectives for employees that pertain to professional development.	HUM writes measurable performance objectives for employees that pertain to professional development
	HUM & WUM must agree on the expectations for the employee set forth in the <i>Matrixed/Service Provider Form (online tool)</i> . The expectations are presented to the employee prior to the transition of matrixed work. HUM communicates expectations to the employee.	HUM & WUM must agree on the expectations for the employee set forth in the <i>Matrixed/Service Provider Form (online tool)</i> . The expectations are presented to the employee prior to the transition of matrixed work. HUM communicates expectations to the employee.	HUM & WUM must agree on the expectations for the employee set forth in the <i>Matrixed/Service Provider Form (online tool)</i> . The expectations are presented to the employee prior to the transition of matrixed work. HUM communicates expectations to the employee.
	HUM incorporates professional development as well as ES&H objectives into appraisal. Specific EH&S job training is the responsibility of the WUM.	HUM incorporates professional development as well as ES&H objectives into appraisals. Specific EH&S job training is the responsibility of the WUM.	HUM incorporates professional development as well as ES&H objectives into appraisals. Specific EH&S job training is the responsibility of the WUM (Customer).
	The employee's merit increase is from the Home Unit Division fund.	The employee's merit increase is from the Home Unit Division fund.	The employee's merit increase is from the Home Unit Division fund.
3-6 Month Follow Up	The Work Unit Manager's responsibility is to complete the <i>Matrixed/Service Provider Form (online)</i> for those employees that spend 10% to 49% of their time matrixed to another division or department and return to HUM at the end of the assignment so that feedback is incorporated into the review. For those assignments that extend beyond the original, both HUM & WUM revisit to assess progress against stated goals and scope of work and renegotiate the matrixed agreement. If an extension is required, the HUM communicates the extended assignment to the employee or reassigns another employee and meets with him/her.	The Work Unit Manager's responsibility is to complete the <i>Matrixed/Service Provider Form (online)</i> for those employees that spend 50% or more of their time matrixed to another division or department and return to HUM at the end of the assignment so that feedback is incorporated into the review. For those assignments that extend beyond 6 months, both HUM & WUM revisit to assess progress against stated goals and scope of work to ensure realistic expectations of assignment in 6 month intervals. If an extension of the SLA is needed, the HUM communicates the extended assignment to the employee or reassigns another employee and meets with him/her.	The Work Unit Manager's (Customer's) responsibility is to complete the SLA for those employees that provide services, per the SLA, to another division or department at the end of the assignment so that feedback is incorporated into the review. Both HUM & WUM (Customer) revisit agreement to assess progress against stated goals and scope of work to ensure realistic expectations of assignment in 6 month intervals. If an extension of the SLA is needed, the HUM communicates the extended assignment to the employee or reassigns another employee and meets with him/her.
	HUM is responsible for delivering the review to the employee and incorporating feedback from WUM.	HUM coordinates employee's overall performance with WUM. The WUM provides specific feedback/documentation to the HUM so the overall performance assessment is understood and agreed to. The HUM delivers the performance review.	HUM is responsible for delivering the review to the employee and incorporating feedback from WUM (Customer).
		If assignment exceeds one year, agreement between HUM and WUM are renegotiated. Responsibility is with HUM to communicate progress and status with employee.	SLA's are negotiated annually through AWP if the work exceeds 1 year. HUM is responsible for communicating status to employee.
Leave	HUM approves leave requests. However, both HUM & WUM are informed of time off request via an email from the employee. Employee is expected to notify HUM & WUM of request at least 1 week in advance so that arrangements can be made to cover work/project requirements.	Employee is responsible for informing both HUM & WUM of leave request via email. Since employee is matrixed out more than 50%, WUM approves request and copies/notifies HUM. Employee is expected to notify HUM & WUM of request at least 1 week in advance so that arrangements can be made to cover work/project requirements.	Employee is responsible for informing both HUM & WUM (Customer) of leave request via email. Employee is expected to notify HUM & WUM (Customer) of request at least 1 week in advance so that arrangements can be made to cover work/project requirements. HUM communicates final approval of time off request.
Disciplinary Action	Corrective action shall be taken by a manager when an employee fails to meet JLab's standards of performance or conduct.	Corrective action shall be taken by a manager when an employee fails to meet JLab's standards of performance or conduct.	Corrective action shall be taken by a manager when an employee fails to meet JLab's standards of performance or conduct.
	Corrective action shall be administered by the manager in which the offense occurred. In instances where this is the WUM, the HUM must be consulted prior to delivery. When action rises to the level of a written warning or greater, the HUM will be required to sit in for the delivery.	Corrective action shall be administered by the manager in which the offense occurred. In instances where this is the WUM, the HUM must be consulted prior to the delivery. When action rises to the level of written warning or greater, the HUM will be required to sit in for the delivery.	Corrective action shall be administered by the manager in which the offense occurred. In instances where this is the WUM, the HUM must be consulted prior to the delivery. When action rises to the level of written warning or greater, the HUM will be required to sit in for the delivery.
	Corrective actions include verbal counseling, written warning, suspension, dismissal or other actions deemed appropriate under the circumstances.	Corrective actions include verbal counseling, written warning, suspension, dismissal or other actions deemed appropriate under the circumstances.	Corrective actions include verbal counseling, written warning, suspension, dismissal or other actions deemed appropriate under the circumstances.
	Corrective action involving the delivery of a written warning or above must be coordinated with HR prior to delivery. In the event a Performance Improvement Plan (PIP) is given to the employee, the manager who delivered the document will be responsible for the follow up to ensure performance standards have met expectations.	Corrective action involving the delivery of a written warning or above must be coordinated with HR prior to delivery. In the event a Performance Improvement Plan (PIP) is given to the employee, the manager who delivered the document will be responsible for the follow up to ensure performance standards have met expectations.	Corrective action involving the delivery of a written warning or above must be coordinated with HR prior to delivery. In the event a Performance Improvement Plan (PIP) is given to the employee, the manager who delivered the document will be responsible for the follow up to ensure performance standards have met expectations.
Professional Development	Professional Development: HUM is responsible for overseeing this activity. HUM obtains feedback from WUM on specific skills needed to meet or enhance work demands and incorporates as appropriate into the employee's development plan.	Professional Development: HUM is responsible for overseeing this activity. HUM obtains feedback from WUM on specific skills needed to meet or enhance work demands and incorporate as appropriate into the employee's development.	Professional Development: HUM is responsible for overseeing this activity. HUM obtains feedback from WUM (Customer) to determine what additional skills are needed to meet customer demands and incorporates as appropriate into employee's development.
Staffing/Recruitment	If the matrixed employee leaves the Lab, the HUM is responsible for filling the position. If, at the time of attrition an employee was matrixed out, HUM will include the WUM or a member of the WUM's group during the recruitment process.	If the matrixed employee leaves the Lab, the HUM will be responsible for filling the position. If, at the time of attrition, an employee was matrixed out, HUM includes the WUM or a member of the WUM's group during the recruitment process.	If, at the time of attrition, the employee was engaged in a SLA, the HUM meets with the WUM (Customer) to evaluate existing resources and provide a suitable replacement.
Escalations	When the occasion arises that the WUM and HUM can not reach consensus regarding work scope, priorities, or overall performance evaluation for an employee, the decision will be escalated to the next level for appeal and review.	When the occasion arises that the WUM and HUM can not reach consensus regarding work scope, priorities, or overall performance evaluation for an employee, the decision will be escalated to the next level for appeal and review.	When the occasion arises that the WUM and HUM can not reach consensus regarding work scope, priorities, or overall performance evaluation for an employee, the decision will be escalated to the next level for appeal and review.
Timeframe	HUM & WUM determine start and end dates. If timeframe exceeds original agreement it must be renegotiated and HUM communicates to the employee.	HUM & WUM determine start and end dates. If the timeframe exceeds the original agreement, it must be renegotiated. Communication of an assignment extension is the responsibility of the HUM. If matrixed position appears to have an indefinite end date after 2 years, position should be reevaluated to determine if it needs to be reclassified or reassigned. Reassignment of a position can occur, however, the division level management must be apprised of the situation and make the final decision.	SLA's are negotiated through AWP annually or until service is complete. It is understood that SLA's may be in place for several years; however, through annual reviews, the scope's needs and resources will be evaluated as well as communicated between HUM and WUM (Customer) as well as impacted employees.