

MEMORANDUM OF AGREEMENT

BETWEEN

SANTA CLARA COUNTY ASSESSOR'S OFFICE

AND

LOCAL 715, SERVICE EMPLOYEES INTERNATIONAL UNION

SEIU

This Agreement is made pursuant to Article 8, Section 8.15 of the Master Agreement between the Union and the County and relates to work assignments for extended out-of-state/out-of-county trip assignments for the employees in the Assessor's Office.

This Agreement will be subject to possible revision required as a result of changes in law. In the event of changes in law which directly impact provisions of this Agreement, the parties agree to reopen the Agreement to meet and confer over a mutually agreeable replacement to the specific provisions(s) of the Agreement affected.

I. Planning and Scheduling

- A. The Assessor will plan and schedule all known trips for the forthcoming fiscal year based upon Santa Clara County and contract audit workloads.
- B. The Agreement shall be subject to primary Assessor's policy that an auditor does not perform repeat audits of the same account unless specifically authorized to do so.

- C. Audit trips will be scheduled for up to a maximum of two (2) weeks. The Department reserves the right to extend audit trips beyond two (2) weeks duration should contingencies arise. Contingency is generally defined as a problem arising out of some unavoidable incident which causes pre-scheduled appointments to be cancelled/delayed.

II. Trip Location List

- A. The Assessor will prepare a list of trips containing the following data:

1. Anticipated trip duration dates.
2. Trip location(s).
3. Auditor requirements which must be met to qualify for the trip, i.e., classification and prior experience.
4. Two (2) travel alternate openings.
5. Volunteer deadline date.

- B. The trip location list will be posted prior to May 15.

III. Volunteer List

- A. The Assessor will prepare and post three (3) volunteer lists: One (1) for Supervising Auditor-Appraiser; one for Senior Auditor-Appraiser; and one (1) for Auditor Appraiser and Accountant Auditor.

- B. Each volunteer list will be compiled in the following manner:

1. Individuals who have not received a first choice or waived in any of the past three (3) years.

2. Individuals who received a first choice or waived once within the past three (3) years in the following order:
 - a) Three (3) years ago.
 - b) Two (2) years ago.
 - c) Last year.
 3. Individuals who received a first choice or waived two (2) out of the past three (3) years in the following order:
 - a) Three (3) and two (2) years ago.
 - b) Three (3) years ago and last year.
 - c) Two (2) years ago and last year.
 4. Individuals who received their first choice or waived all three (3) of the last three (3) years.
 5. Individuals with no travel experience.
- C. Within each subdivision the individuals will be in order of their seniority in grade with the most senior person being at the top.

IV. Assignment List

- A. The Assessor will prepare and post three (3) assignment lists: One (1) for Supervising Auditor-Appraiser; one (1) for Senior Auditor-Appraiser; and one (1) for Auditor-Appraiser and Accountant-Auditor.
- B. Each assignment list will be compiled in the following manner:
 1. Individuals who have not traveled within the last three (3) years.

2. Individuals who have traveled once within the last three (3) years in the following order.
 - a) Traveled three (3) years ago.
 - b) Traveled two (2) years ago.
 - c) Traveled last year.
 3. Individuals who have never traveled.
 4. Individuals who have traveled two (2) out of the past three (3) years in the following order:
 - a) Three (3) and two (2) years ago.
 - b) Three (3) years ago and last year.
 - c) Two (2) years ago and last year.
 5. Individuals who have traveled all three (3) of the last three (3) years.
- C. Within each subdivision the individuals will be in order of their seniority in grade with the least senior person being at the top.
- D. Management will be able to hold individuals off the assignment list due to office requirements such as Appeals Board, etc.
- E. The listing will be posted at the same time as the trip location list.
- F. Los Angeles trips will be counted as a trip taken for assignment purposes.

V. Volunteer or Assignment Procedure

A. Volunteer Traveling Auditors - First Round

Volunteer traveling auditors will have one (1) week, from the time the lists are posted, to request a first choice of travel assignments. Management will then fill travel assignments with volunteers, in order of their position, on the volunteer travel list. However, management will be able to exclude from the volunteer list individuals for office requirements. (i.e., Appeals Board, etc.)

B. Volunteer Traveling Auditors - Second Round

A second list of filled and unfilled trip assignments will be posted, and one (1) additional week will be given to volunteer for the unfilled assignments. Initial volunteers in V.(A) above will be assigned to their second round First choice prior to any new volunteer. Second Round First choices will be considered as "first choice".

C. Unfilled Travel Assignments

1. Remaining unfilled trips, including alternates, will be assigned on the basis of a person's position on the assignment travel list.
2. Persons whose qualifications exceed stated requirements for a trip may be assigned in assignment list order if list of personnel meeting those requirements becomes exhausted due to illness waivers.

D. Preliminary Travel Assignment List

1. The preliminary travel assignment list containing volunteers and Assessor assigned personnel will be posted prior to June 15.
2. The list will contain trip dates, locations, personnel assigned to each trip, two (2) alternate travel personnel and waiver deadline date.

VI. Waivers

Persons assigned under number V.(C) above will have one (1) week to submit a waiver. In the event that it becomes necessary for management to disallow a waiver because of unfilled trips, those individuals who have not traveled for the longest period of time shall be assigned the unfilled trip.

Individuals who exercise waivers for reason of personal or immediate family illness shall be considered last for unfilled trips. Verification for the above shall be provided upon request.

VII. Trip Trades - Assigned Personnel

Assigned personnel wishing to "trade" trips, or assignments, may submit written request.

Both parties involved in the trade must agree and sign the request.

Trip trades are subject to approval.

Trip trade requests must be submitted within one (1) calendar week of the posting of each list and carry the same deadlines as waivers indicated on the preliminary travel assignment list.

Trip trades shall be posted.

VIII. Emergency Travelers

A. In addition to regularly scheduled traveling auditors, two (2) standby traveler openings will be listed on the trip location list for volunteers or subsequently assigned on the travel assignment lists.

B. Persons identified as alternates, if qualified for trip requirements, will fill regularly scheduled audit trips if an emergency such as illness or accident of an auditor or immediate family prevents the scheduled person from going.

C. In the event of filling an emergency vacated trip, the alternate will be provided at least two weeks notice prior to scheduled departure.

D. If a trip is altered, extended or rescheduled to a different date through circumstances not known when posted, the trip will remain filled as originally scheduled, subject to waiver provisions. If the trip is waived, it will be filled according to the provisions of section IX, Unscheduled Audit Trips.

IX. Unscheduled Audit Trips

Audit trips occurring after the normal assignment procedure has been completed will be handled in accordance with the current volunteer and assignment lists.

In the event a trip is assigned, the first person on the assignment list who neither waived nor traveled will be assigned the trip. This would normally be the standby traveler. Persons assigned and notified will have two (2) days to submit a waiver.

Only trips in excess of four (4) working days will count as a trip taken for assignment list purposes when filled by a volunteer. When assignment is required, any audit trip in excess of three (3) days will be considered a trip taken for assignment list purposes. Volunteers filling unscheduled audit trips will not be considered to have had a first choice.

X. Term

The term of this agreement will be for twenty-two (22) months to and including February 28, 1982. Thereafter, this agreement shall continue in full force and effect from year to year, unless notice to terminate or amend is made by either party in November of the year immediately preceding the February termination date. If such notice is provided, negotiations of a successor agreement shall take place in December, January and February following the November notification. If no agreement is reached, impasse may

be declared by either party. The impasse procedure to be followed shall be in accordance with Section 8.15 of the Master Agreement.

Dated: June 11, 1980

FOR THE DEPARTMENT

[Signature]

Theodore G. Lee

Michael Wayland

FOR LOCAL 715, SEIU, AFL-CIO

Charles R. Lindberg

Paul J. Diampalo

Elizabeth Presler

Andia M. Mcmorrow

mkd

5/13/80