

## **Matrixed Personnel**

A person is considered "matrixed" if the person has a "home" division from which he/she is assigned to perform all or most of their work in a "host" division and typically receives daily work instructions from the host division. Personnel from other divisions (primarily Engineering Division) are matrixed to ATAP, and some ATAP personnel are matrixed to other divisions, such as ATAP ALS Accelerator Physics personnel. LBNL requirements are found in the **Requirements and Policies Manual (RPM) Matrixed Employee Work Authorization Policy**.

The employee's supervisor from the home division or department retains all health and safety responsibilities pertaining to matrixed employees, except where some of the responsibilities have been transferred to the host division or department through a Memorandum of Understanding (MOU). Whenever an MOU is established, it remains the responsibility of the home supervisor to assure that the MOU is appropriately implemented.

The Work Planning and Control Activity Lead is the person responsible for providing day-to-day technical direction and oversight, including responsibilities for proper execution of ES&H activities of Employees and Affiliates, including matrixed personnel. The Activity Lead can be in a division separate from the Employee's home division. (**WPC Activity Leads** are not considered Higher Education Employee Relations Act (HEERA) supervisors). Activity Leads partner with the official home division (HEERA) Supervisor on matters of staffing needs, performance feedback, and work direction. The Activity Lead and home division supervisors discuss corrective actions for ES&H performance issues relative to the matrixed assignment. The Activity Lead refers matrixed personnel to their home division supervisor to address issues that are not directly related to the day-to-day tasks of the matrix assignment, but is responsible for ensuring implementation of those that are related to those day-to-day tasks. The Activity Lead and home division supervisor stay appropriately informed of and sensitive to personnel issues that may be covered by collective bargaining agreements.

People performing short-term tasks for other Divisions are not considered matrixed personnel. ATAP personnel requesting work from another division are expected to inform the workers of any hazards or safety precautions associated with the work.

## **Engineering Division**

ATAP and Engineering Divisions have developed an MOU to define the ES&H roles and responsibilities of Home and Host Divisions for matrixed assignments. **See Section 2.23, MOU for Matrixed Engineering Staff**. This MOU may be used as a template for developing MOUs with other Divisions as needed.

## **ATAP's ALS Accelerator Physics Program and ALS-U Project**

ATAP's Advanced Light Source (ALS) Accelerator Physics Program personnel are matrixed to ALS Division. Some ATAP personnel are also matrixed to the ALS-U Project. These matrixed personnel are also subject to the **ALS Division ISM Plan** and ALS and/or ALS-U work authorizations. People working on ALS-U are assigned to WPC Activity **AG-0002 General Support Work for ALS-U**.

The ESH roles and responsibilities of personnel matrixed from ATAP to perform work under the direction of ALS or the ALS-U Project, and the roles and responsibilities of Home (ATAP) and Host (ALS/ALS-U) Supervisors of matrixed employees are described in the Memorandum of Understanding between ALS and ALS-U as follows (**with Division-specific clarifications in parenthesis**):

### Definitions:

- ALS-U work - Effort charged to an ALS-U PID.
- Host division – The division managing the space in which ALS-U work is performed.
- Home division – The division to which a worker is assigned membership as documented in the LBNL HRIS database. (**ATAP for ATAP personnel**)

### Work authorization

Work is authorized through the workers' line management (**ATAP WPC Activities for ATAP personnel**.) If ALS-U work is being done consistent with a worker's home (**ATAP**) or matrixed division (**ALS-U**) WPC Activity, then the work may be authorized by that Activity by agreement between that division (**ATAP**) and the ALS-U project. In these cases, the Project may document this by generating an ALS-U WPC Activity which describes the work and identifies the workers, but references the home/matrixed activities which authorize the work.

If the ALS-U project determines that a worker is not adequately authorized by existing division (**ATAP**) activities, ALS-U may collaborate with the division (**ATAP**) to add or revise existing activities or may generate ALS-U specific activities for authorization. The host division (**where the work takes place, e.g. ALS Division**) must be involved in the development of all ALS-U Project WPC activities to ensure that all host division required controls are included as appropriate.

Personnel may provide support for ALS-U on a part-time basis, retaining division (**ATAP**) responsibilities for the balance of their time. People are considered ALS-U Project personnel when they are executing responsibilities related to their positions in the ALS-U organization and the Project assumes responsibility for the safe execution of their work. People performing work supporting the project consistent with their role and work

authorization in a divisional (**ATAP**) organization are considered division (**ATAP**) personnel and the division (**ATAP**) line management assumes responsibility for the safe execution of the work (as well as incident investigation, if necessary), independent of the PID the effort is charged to.

#### Office/computer work

For consistency and clarity, office and computer work should be authorized by a worker's home (**ATAP**)/matrixed (**ALS/ALS-U**) division. Ergonomic injury resulting from ALS-U work will be addressed by collaboration between the ALS-U project and the home/matrixed division.

#### Injury reporting

Workplace injuries are reported associated with a worker's home division (**ATAP**). To assist with the ALS-U project's ISM processes, injuries occurring while workers are performing ALS-U project work should be communicated to the project by the home division safety organization (**ATAP ES&H Coordinator**).

#### Work integration

When ALS-U work is anticipated, the ALS-U person responsible for the work should, prior to the start of the work, document the scope, the personnel involved and where/when the work is to be done. The proposed work will then be coordinated with the host division (**where the work takes place, eg., ALS**) to ensure appropriate WPC and integration into host division operations.

**All personnel performing ALS-U work in ALS space must, at a minimum, be listed on WPC activity AG-0002 and have taken the ALS course ALS1001 *Safety at the ALS*.**