

Bargaining to begin on the IRS's proposal to change the Case Assignment Grading System for Revenue Officers.

NTEU is preparing for bargaining on the IRS's proposal to change the Revenue Officer (RO) Case Assignment Grading (CAG) system and the establishment of standardized post-assignment grading for Grades 9, 11, 12, and 13 RO case work. NTEU has tentatively scheduled bargaining on this initiative for October 2008.

According to the IRS, this initiative was created after IRS analysis of the components currently used to assign case grades for ROs. The multiple systems currently utilized for case grading and assignment (RWMS, IDS, IDRS, Entity, ICS, etc.) were developed independently and at different times and as a result are neither standardized nor do they interact effectively. In addition, the IRS indicated a need to include the RO Grade 13 case work in case assignment grading.

The justification provided by the IRS is that the scope of the initiative is limited to improving the accuracy of assigning correctly graded work to appropriately graded and skilled staff. The objectives of initiative are improving case grading accuracy, systemic grading of all cases, standardized post-assignment grading, and reduction or elimination of systemic grade increases once a case has been assigned to the field.

The IRS anticipates that realigning the CAG under this initiative will provide benefits such as avoiding redundant programming efforts and costs, improving the consistency of manual application of the CAG, reducing the number of cases requiring manual grading, improving the accuracy of systemic grading, and reducing the number of cases graded inaccurately both pre- and post-assignment.



Labor Recognition Event held at 1100 Commerce. See page 5 for more pictures.

This IRS initiative sounds well and good on the surface. However, after you get past the first read of this proposal, it is just compounding the problems of our ROs. In addition to having unrealistic performance expectations concerning the amount of "proper" work inventory and timely actions required to be performed on these cases, this initiative looks like a perfect way to systematically lower the grade of cases being worked by the ROs. This is just another in a long line of check list procedures that do not allow for any judgment in making the case grading determination. It seems that the IRS is determined to make that square peg fit into a round hole. The only benefit from this initiative is making the manager's job easier at the detriment of the ROs. Hidden within the

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John's Column

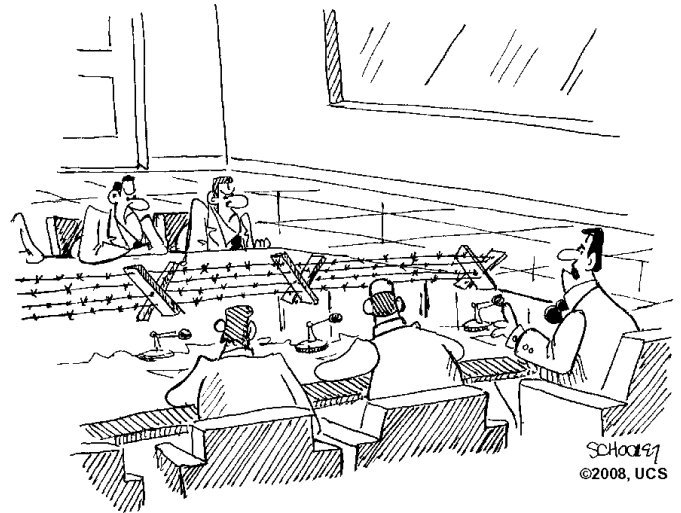
By John Darden
Chapter President

NTEU and IRS agree on ground rules for a new contract – IT IS ABOUT TIME!

The ground rules have been approved and mediation/arbitration remains in the process.

Since the IRS insisted on breaking away from a 30 year old tradition with NTEU and no longer agree to well established ground rules for negotiations, NTEU has declined to meet at the bargaining table to discuss a new contract. Management wanted to change "every sentence" in the term agreement with the belief that any disagreements would be heard by the pro-management/anti-union Federal Service Impasses Panel that President Bush had appointed. NTEU was left with no choice but to fight management's plan any way possible in order to keep political appointees from setting the terms of the IRS contract. So now, in short, we have a professional collective bargaining neutral, not a campaign contributor to settle issues in our union contract.

With clear ground rules for dispute resolution, "the game is now on!" Negotiations on our new contract will begin on October 17 and are scheduled to go through February 13th. IRS and NTEU bargaining



"Let the negotiations begin!"

officials will meet on and off for six weeks and a neutral will take jurisdiction for a two week period at the end to help the parties reach voluntary solutions to any unresolved issues. Any issue unresolved after that time will go to panel of three arbitrators to make a determination.

NTEU will have seven bargaining officials of which five will be permanent and other two slots will rotate among various chapters during the negotiations. As the President of NTEU Chapter 46, I am honored to have been selected to serve as a permanent member of the NTEU Negotiation team. The down side is that this will take me away from the chapter for the next few months. However, I also realize the importance getting the next National Agreement with the IRS in place. I can assure you that I will stand firm on the side of our employees and do my very best to get an agreement that meets the needs of our members.

I am also excited about the opportunity these negotiations give us to remind employees that NTEU will protect what they have and fight to get them an even better working environment where they can be successful.



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Things you should know

when you go to vote in the upcoming election:

1. Never, wear any PINS/BUTTONS of any candidate to the polls (you will be turned away).
2. Do not wear Tee Shirts or Caps of candidates. This is considered campaigning for your candidate.
3. Expect to wait in long lines. It is your right to VOTE; but please don't get upset, bring a friend to talk to while you wait.
4. Make sure that your driver's license or state issued I.D. card matches your voter's registration card address.

These are just a few tips that may prove useful for the upcoming election for whomever you may be voting. Please exercise your rights and vote! Change starts with you AND me. I am doing my part, how about you? Your vote is critical in this election, so exercise your right! Any questions or concerns feel free to contact me at 214-413-5555. 

A reminder about Administrative Leave to vote.

Article 36

Section 1 — For the purposes of this article, administrative leave is approved absence from duty without loss of pay and without charge to leave.

Section 2 — As a general rule, when the voting polls are not open at least 3 hours either before or after an employee's regular hours of work, such employee may be granted an amount of excused leave to vote or register which will permit the employee to report to work 3 hours after the polls open or leave work 3 hours before the polls close, whichever requires the lesser amount of time. If a manager refuses to allow an employee administration time off to vote, the matter will immediately be referred to the SCR for determination whether the granting of administrative time off is appropriate.

Annual Appraisals

In light of recent events involving managements excessive lowering of Employees' Performance Appraisals, I would like to take this opportunity to empower our readers. Considering the fact that your evaluation is ONLY once a year, it is imperative that it be fair, accurate, clear, and concise. There are guidelines in place to ensure that your performance standards are based on critical job elements. A few of these resources are available at the following locations. Most of these are geared towards Accounts Management employees. However, there is job specific information available at the Human Capital Office site.

<http://hco.web.irs.gov/> -- the Human Capital Office, under the Performance Management tab

<http://irweb.irs.gov/> -- in the search engine box type IRM 6.430 Performance Management, also IRM 1.4 Resource Guide for Managers.

<http://www.nteu46.org/> -- March 15, 2002 MEMORANDUM, SUBJECT: Hold Policy

<http://hco.web.irs.gov/apps/na/contract06/index.htm> -- Article 12, Performance Appraisal System, Section 4(B)(5), 4(C), 9(D), 4(K), 4(M).

<http://www.nteu46.org/nteu46org/Agreement/WrapTime.pdf> -- February 05, 2001 MEMORANDUM, SUBJECT: Use of Wrap Time

<http://www.nteu46.org/nteu46org/Agreement/ACSMOU19990729.pdf> -- Center and Call Site Restructuring Implementation Agreement between Internal Revenue Service and National Treasury Employees Union

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<http://serp.enterprise.irs.gov/databases/irm.dr/current/21.dr/21.10.dr/21.10.1.dr/21.10.1.7.htm>
IRM 21.10.1.7 Embedded Quality Review System

If your manager indicates to you that there is a decline in your performance, you want to pay particular attention to Article 12, Section 4(M) and Article 40. You are to be informed of any negative observation(s) that will affect your CJE average, by your manager no later than 6 months into your appraisal period. This is so you can be afforded an opportunity to improve your performance during the rating period. You also need to know specifically what the performance-based deficiency may be, along with which IRM, IRC, Tax Law, etc. was violated. I would also like to remind all readers that the IRM (Internal Revenue Manual) is your friend and more often than not, should be your first resource.

When you receive performance feedback, the violated reference must be included. You need it in order to be able to go back and review the reference in question pertaining to the error. If you are a Contact Representative, listen to the call with your manager. If you still disagree, get your Lead, Quality Reviewer, Department Manager or Second-Level Manager, and the IRM Author involved. If all else fails, be sure to include a rebuttal for reviews, EQRS, Mid-Year, etc. It is always best to write your rebuttal on the document itself for integrity/honesty purposes. Article 12 Section 9(B) provides employees with administrative time to rebut an evaluative recordation, which includes EQRS reviews. The EQRS LOU explicitly recognizes that Section 9 applies to EQRS.

Employees should provide self-assessments before their appraisal is due. Article 12 Section 4(B)(5) provides employees with administrative time to prepare a written self-assessment, and 4(B)(6) requires managers to explain the reasons for rejecting an employee's self-assessment. By taking advantage of these provisions, employees may prevent disputes about their performance, or at least narrow the issues in dispute while creating an evidentiary record to support a grievance.*

Employees should ask their supervisors to clarify and explain performance expectations (e.g. how the EQRS rating "attributes" relate to job duties, CJE's for the position, IRM requirements, etc.) early in the performance year, or as soon as questions arise. Additionally, employees should document their questions and any responses from management, as well as any steps the employee takes to implement management guidance (email is an excellent way to capture a dated record of discussion). Management's failure to provide a meaningful explanation or clarification of performance expectations as they relate to EQRS could violate one or more of the following provisions, depending on the circumstances:

Article 12, Section 3(E), which obligates supervisors to discuss and clarify CJE's and performance standards with employees annually, or whenever changes occur; and the EQRS LOU dated January 18, 2007, sections 1 through 4, which require managers to explain the relationship of EQRS attributes to CJE's and answer questions regarding EQRS.

Article 12, Section 4(M), requiring supervisors to provide ongoing performance counseling, especially when performance declines. Note that arbitrators have repeatedly held this provision requires "meaningful" counseling, such as specific and concrete advice and examples to improve performance, not simple criticism, or generalities.

The EQRS LOU explicitly recognizes that Section 9 applies to EQRS.

Lastly, if you are told that the error violates "local procedure", it should not be counted against you, but be an F.Y.I. unless it is in writing and accessible to all "local" employees as a reference or alert. If it isn't, how would you know it is a "local procedure"???


I hope that these helpful tips provide some assistance and as always, whenever in need contact chapter 46!

**NTEU National President's Memo to IRS Chapter Presidents dated 07/09/08*



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briefing documents are benefit statements that read: "Reduces managerial burden – Improves accuracy of systemic grading, reducing need for post assignment manual grading and need for managerial review of grade levels." and "Reduces number of cases requiring manual grading as systemic/pre-assignment improves."

NTEU will be working closely with the IRS on this initiative. This is anticipated to include the establishment of an implementation team that contains ROs and the preparation of a communication plan to keep employees apprised of the progress of the CAG implementation team. 

Labor Recognition Event held at 1100 Commerce



NTEU Chapter 46 Open House



Come join us in the
Union Office
for some holiday snacks
and refreshments on

December 18th
from 1:00 p.m. to 4:00 p.m.
Room 833,
1100 Commerce

Thumbs Up/Thumbs Down



Thumbs up to President Bush, the House and Senate for approving a continuing resolution that included an average 3.9 percent pay raise for federal employees.



Thumbs down to the collection manager for taking people off AWS and flexiplace without having a reasonable and representative sample of their work.



 **Happy Holidays!**