



## **Firebird 24**

*Reborn From Our Ashes*

### *NTEU Chapter 24 Newsletter*

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**Volume 9**

**\*\*\*Members Edition\*\*\***

**April 2007**

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#### **Performance Appraisals**

**-Jeri L. Burger**

**Vice President and**

**Chief Steward**

This will be the first in a series of articles about performance appraisals. In order to protect your rights it is important that you understand the components of your appraisal.

Article 12 of the National Agreement covers all aspects of performance appraisals. I think the key section is Article 12, Section 4C, which reads in part, "Performance appraisals will be made in a fair and objective manner."

Why is it important that you receive a fair rating? Because your eligibility for performance awards, within grade increases, promotions, ability to work an Alternative Work Schedule and Flexiplace, reduction in force procedures, and potential adverse actions are all affected by your annual rating.

Let's look at what the scores on your annual rating mean:

We all have five critical job elements (CJEs). Each position has their own CJEs. You should have a copy of your Performance Plan that breaks down your CJEs. See your manager or union steward for a copy.

The five critical elements are:

- I. Employee Satisfaction – Employee Contribution
- II. Customer Satisfaction – Knowledge
- III. Customer Satisfaction – Application
- IV. Business Results – Quality
- V. Business Results – Efficiency

Each of the CJEs has three or more aspects. For example, CJE #1 has aspect 1A Workplace Interaction, 1B Workgroup Involvement and 1C Workplace Environment.

You are rated in each aspect as "Exceeds", "Meets", or "Fails." The ratings for each aspect are combined to compute your score for the CJE. The CJE score is a rating of 1 through 5.

- 5 Exceeds all performance aspects of the CJE
- 4 Exceeds more than half of the aspects
- 3 Meets all performance aspects
- 2 Fails in one performance aspect
- 1 Fails two or more performance aspects.

For example, if you are rated exceeds in CJE 1A, meets in CJE 1B and exceeds in CJE 1C your overall rating would be a 4 – you exceeded in two of the three aspects. If you are rated as exceeds in 1A, meets in 1B and fails in 1C your rating overall would be a 2 – you failed in one performance aspect.

You are then given a numerical overall rating, which is simply the average of your CJE scores. Your overall rating is then defined as:

- Outstanding – Rated a 5 in more than half of the CJEs and a 4 in the other CJEs
- Exceeds Fully Successful – Rated a 4 in more than half of the CJEs and a 3 in the other CJEs
- Fully Successful – Rated a 3, or more, in all CJEs
- Minimally Successful – Rated a 2 in one or more CJEs, but not a 1 in any CJE

Unacceptable – Rated a 1 in any CJE

Therefore:

- A rating of three “5s” and two “4s” is Outstanding
- A rating of three “5s”, one “4” and one “3” is Exceeds Fully Successful. Even though there are more than half ratings of “5”, the other CJE’s are not all 4s
- A rating of one “5”, three “4s” and one “3” is Exceeds Fully Successful
- A rating of three “3s” and two “4s” is Fully Successful
- A rating of one “5”, one “4” and three “3s” is Fully Successful – since not more than half of the CJE’s are more than a “3”
- A rating of two “4s”, two “3s” and one “2” is Minimally Successful.
- A rating of four “3s” and one “1” is Unacceptable

It is important that you verify that your ratings are numerically correct. As an example, one employee was rated exceeds in all three of the aspects in CJE #1 yet the manager gave an overall CJE score of “4”. The rating should have been a “5”; which impacted the employee’s performance award.

Your manager is your rating official, unless they have not been your manager of record for at least 60 days. In that case your next level of management must sign your performance appraisal. This applies to acting managers also. An acting manager must have been acting 60 days prior to the end of your rating period before they can prepare and sign your performance appraisal.

Your appraisal period is determined by the last number of your Social Security Number.

| <u>Last Digit of SSN</u> | <u>Annual Rating Period Ending Date</u> | <u>Appraisal Due Date</u> |
|--------------------------|---|---------------------------|
| 0                        | September 30                            | October 31                |
| 1                        | October 31                              | November 30               |
| 2                        | November 30                             | December 31               |
| 3                        | December 31                             | January 31                |
| 4                        | January 31                              | February 28/29            |
| 5                        | February 28/29                          | March 31                  |
| 6                        | March 31                                | April 30                  |
| 7                        | April 30                                | May 31                    |
| 8 & 9                    | May 31                                  | June 30                   |

For example, this year’s annual rating period for a SSN that ends in 0 would be from October 1, 2006 through September 30, 2007. The due date of the performance appraisal is October 31, 2007. This is important because your manager can only use your work performed within the defined rating period for your performance appraisal.

The subject for the next article will be how evaluative recordations, including embedded quality, can affect your performance appraisal.

## Sound Off!



Got something you want to tell us or others about? Want to express your opinion anonymously?

Leave your message at **(313) 628-3864** and we will print reasonable topics. Please speak distinctly and limit your comments to a few sentences.

To Wit: “As a long serving Federal employee, I am disgusted that we are expected to do more with less, while the President and Congress can’t get a budget passed. They feel content with simply passing a continuing resolution. A lame duck presidential year does not relinquish responsibility.”

And, “President Bush announced that he would veto any bill passed by Congress allowing the TSA to unionize. I guess NTEU has got him running scared.”

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## Myth Busters

-Karen Johnson

Imagine this: You go to bed one night expecting to wake and get ready for work the next morning. Instead, in the morning, you are awakened to a sudden feeling of dread. Your symptoms are headache, fever, upset stomach; in a nutshell, you are sick.

You lay your head down on the pillow and fall back to sleep. Maybe when you wake up you will feel better. Instead, you roll over at 8:30, groan, reach for the phone, and call your manager to report your absence. Your manager doesn't answer the phone, so you leave a voice message that you are calling in sick.

The next day, feeling better after a day of convalescing, you proceed to the office. When you arrive at work, you are told that you are being placed on AWOL (Absent Without Official Leave) for not showing up for work the day before. What???? Your manager proceeds to tell you that workload demands would have made it impossible for sick leave to be approved, and because you failed to speak to him or her directly to request their approval for sick leave, you are considered absent without leave.

What should you do now? The correct answer is contact your NTEU Chapter 24 steward.

Employees are obligated to complete a leave request (SF71, or other acceptable written request) as far in advance as possible when they know that they will need to use annual leave, or sick leave. As an employee, when you are incapacitated and cannot report for duty, you are required to notify your immediate supervisor as soon as you can.

The Employee Personnel Resource Guide states "If you are too sick to come to work, request leave from your manager as soon as you can (generally, within the first two hours of the time you normally report to work on the first day you are absent). If your manager is unavailable, leave a telephone number where you can be reached, ask for the next higher manager, or call back when the manager is available. If your illness continues beyond one day, you must keep your manager informed, normally each day." Article 34 Section 2 of the National Agreement (the Contract) states employees must report their absence "...in no event later than two (2) hours after normal time for reporting for work in the first day..." of your illness.

What is important here is that you are not obligated to take Herculean efforts to reach your manager. Leaving your name, stating you are ill,

and providing a telephone number where you can be reached is sufficient. You cannot be placed on AWOL for failing to speak directly to your supervisor when you have made a reasonable attempt to contact them. Unless you are on a leave restriction letter, you are not obligated to provide any medical certification until your illness extends beyond three business days.

Article 34, Section 8 does contain provisions describing the employers' right to assign work under 5 USC 7106(a)(2)(B). This means that our employer can require your presence at work should the employer determine that your services are necessary. To quote the subsection "[the Agency has the right] to assign work, to make determinations with respect to contracting out, and to determine the personnel by which agency operations shall be conducted." If you are an employee at an ACS call site, a Memorandum of Understanding entered into between NTEU and IRS Management dated October 1, 1998, clearly states that requests for sick leave and other types of FMLA (Family and Medical Leave Act), or FFLA (Family Friendly Leave Act) are not controlled by workload demands.

Regardless of your position or post of duty, if you are denied sick leave based on your manager's conclusion that workload demands prohibit the use of sick leave, you should contact your steward immediately for assistance.

### Annual S.O.A.R Breakfast (Save Our Annuity Retirement)

This year's SOAR breakfast was attended by nearly 400 people. Congressman John Conyers singled out Chapter 24's **Legislative Coordinator Kathleen McHugh**, by name, for her diligent legislative efforts. Kathy stated she was slightly embarrassed, but also gratified by the recognition.

### POD Happenings

In Farmington Hills, Timmie Sharp-Boyd and Hattie Morant moved to Detroit POD with Grade 12 promotions—congratulations!





### **You, Baby-Boomers, & Chapter 24**

Like the national workforce and the federal workforce, NTEU Chapter 24 will also be impacted by the retirement of Baby-Boomers in the coming years. These retirements will create a need for new officers, members of the board, and stewards to serve all members. If you are interested in being a steward or otherwise getting involved (e.g. this newsletter), please let your current steward know, or contact the Chapter Headquarters at (313) 628-3652. Chapter 24 needs you, and your ideas and dedication.

### **Helping Hands Committee**



The following is an email I received from Alphonse (Al) Foster. Al is the father of Evan Foster and the husband of Reener Foster, the Revenue Officer and former NTEU Steward who passed away a few years ago.

At the end of November, the Chapter, through its Helping Hands Committee, solicited contributions to help the family. Help is needed because of the transportation costs of the daily trips to Ann Arbor, plus the fact that Al has to tend to Evan at home and can't work other than his work as an artist, which he can do at home.

As a result of the heart-touching generosity of our Michigan employees, we collected \$2,284 for Evan and his care. On December 22nd, the Friday before Christmas, I visited Evan and Al at their home and gave them the contributions. The grateful words expressed by Al and Evan and the love that Al (the gentle giant) exhibited for his son truly exhibited the sense of the season. I wanted to echo the thanks expressed by Al to all those who helped make their season bright.

Thanks.  
Ron Woytalewicz

*Hello Ron,  
Evan and I wanted to thank each and everyone for their love, support and prayers. Evan had a great Christmas thanks to you all. Your support also reminds us how much my wife, Reener Foster, was loved and missed. Evan's tumor has gotten smaller because of the radiation, but the chemo doesn't seem to be shrinking it as well. However, the chemo might be killing it. More tests in the future will tell. Once again, thank you all so, so much. GOD BLESS!!  
Big Al and Little Evan*

### **Welcome New Hires -Mary Cook, Member of the Board & Steward**

NTEU Chapter 24 welcomes new employees to the Internal Revenue Service. As a new employee, part of your background investigation may include an audit of your most recent 2 or 3 years of Individual Income Tax Returns, Form 1040. The audit will be conducted by a trained IRS Tax Compliance Officer or Revenue Agent in a Post of Duty (POD) other than your own. This TCO or RA will be reviewing your records and has the authority to make adjustments pursuant to the Internal Revenue Code and assess additional tax, penalties and interest. The completed audit report will then be sent to the background investigation unit in Florence, Kentucky, as part of their investigation. When you are contacted to appear for such an audit, you may request that an NTEU steward from the Examination Division accompany you. Contact your local Chapter 24 steward to make the arrangements.

### **Retiree Listing -Marianne Gordon, Steward And Chapter Secretary**

Chapter 24 is trying to keep an up to date listing of retirees whom are still members. This

includes not only your physical mailing address, but your E-Mail address, as well. If NTEU does not know your E-Mail address, and you would like it to, please E-Mail me at [marianne.gordon@irs.gov](mailto:marianne.gordon@irs.gov), so that we can update your information. Or, you can go to the NTEU website, [www.NTEU.org](http://www.NTEU.org), click on "Union Office" on the left hand column, and then click on "Membership Profile Contact", and update your information there. If you have any questions, please feel free to contact me at [marianne.gordon@irs.gov](mailto:marianne.gordon@irs.gov)

## GRINCH



## AWARDS

**-Ronald Woytalewicz,  
Chapter President**

--An ACS Manager first insisted that the two hours of Admin Leave at Christmas time had to be used for Christmas luncheons, etc. She finally relented, but then took away the employees 45 minute lunch—Merry Christmas;

--A Manager on the 24<sup>th</sup> floor of the McNamara Building denied an employee's request for annual leave; the employee needed the time to pack and prepare for her move to a new job with the Service in another state;

--A Manager in ACS had an employee who was involved in a severe car accident. The employee had a doctor's note for time off because of the accident. The manager said the note was insufficient because it did not say the employee was injured;

--A Manager in ACS went over an employee's time charges for a month; she found 11 seconds were not accounted for. She asked the employee to explain and provide information about the "missing" 11 seconds;

--A Manager in ACS manages to work the expression "you are on probation" into just about every discussion with the probationary employees in her group.



## And the Heroes

The Chapter had a very difficult time recently trying to correct a problem: a Revenue Officer retired the summer of 2006. A couple pay periods before he retired, he called in on sick leave. Unknown to him, the Group Clerk put him on annual leave. The employee discovered the error after he retired when he was shorted over \$300 in his annual leave lump sum payment. He made several calls and got the leave switched, but was told he would not be paid for the annual leave. The Chapter made several calls and wasted several frustrating hours trying to get this corrected, but was given the same response that he would not be paid. This came from a supervisor at the Payroll Center. As a last attempt before calling a Congressman, the Chapter contacted the Staff Assistant for the retirees division, **Fran Hudak**. Fran made several calls and worked on this problem until she found someone to correct it. The retiree was paid. On behalf of the retiree and Chapter 24, we would like to express our gratitude to Fran for stepping in and correcting this.

**--Ronald Woytalewicz, Chapter President**  
And...

A Revenue Officer was accepted for an out of state lateral transfer. The new Area informed him he was selected and gave him a reporting date. The new Area failed to obtain clearance from Central Area. The Territory Manager was not going to release the Revenue Officer, even though he had already made arrangements to sell his house and move his family. Area Director **Jeffrey Basalla** reversed the Territory Mana-

ger's decision and allowed the employee to transfer. Thank you, Jeff.  
**--Jeri L. Burger, Vice President and Chief Steward**

### **Retirement Corner**

#### **-Victor Jackson & Phyllis Vidler**

Yes. It's time to turn in your paperwork. Without such, you will never retire. The Form 2801 and Form 3107 are the retirement paperwork. These forms are the basis for Office of Personnel Management (OPM) and the agency to calculate your annuity amount, and continue health and life insurance into retirement.

Since there are two pension systems, you must specify which plan applies to you:

- CSRS-Civil Service Retirement System (Form 2801)
- FERS-Federal Employees Retirement System (Form 3107)

Both forms, at first glance, seem long and complicated, but they are not. The first several pages of the package are instructions. Sections A, B, and C are self-explanatory and quick to complete.

Section D-The Annuity section: The election of spousal survivor benefit is a critical decision that you must make with your spouse. If you are married and you choose to elect anything less than the maximum survivor annuity, then you must complete SF 2801-2, or SF 3107-2. They both require your spouse's signature and must be notarized. The reduced survivor annuity amounts are different for FERS and CSRS. If you have a former spouse from whom you were divorced on or after May 7, 1985, and a court order gives a survivor annuity, then you must attach all court documents to your SF 2801 or SF 3107.

Sections E, F, G, H, and I, are easy and self-explanatory.

Health Insurance: An employee must be enrolled within the Federal Employee Health Benefits (FEHB) and Federal Employee Group Life Insurance (FEGLI) programs for five years of service immediately preceding your annuity commencement date, or if enrolled less than five years, for the full period(s) of service during which coverage was available. FEHB coverage, and coverage under CHAMPUS, counts toward the five year requirement for health benefits.

Phyllis realized that she would have to enroll in the FEHB program and did so six years prior to her annuity date, thereby making herself eligible for FEHB on her retirement date.

If you elected the FEGLI program that pays five times your salary, Victor found out that the cost of that insurance was a lot more in retirement than while employed. Please review these costs with your Benefits and Services Team (BEST) office.

Remember to order your retirement package and don't forget to attend the Pre-Retirement Planning Seminars that are offered by the Service.

You can download both Retirement packages from the following websites:

- [www.firstgov.gov](http://www.firstgov.gov) –At the bottom of the page click on Office of Citizen Services and Communications, then click on GSA Quick links, at the right and then click on forms on the left.
- [www.opm.gov](http://www.opm.gov)-- In the middle of the page is a section on retirement; click on retirement information, and then click on forms.

The topic for the next issue will be: LONG TERM CARE INSURANCE.

### **2007 Legislative Conference**

#### **-Kathleen McHugh, Steward And Legislative Coordinator**

The 2007 Legislative Conference took place in Washington, DC, February 26<sup>th</sup> through March 1<sup>st</sup>. Over 330 NTEU members took part. Attending from Chapter 24 were Ronald Woytalewicz, Jeri Burger, Scott Marshall, Victor Jackson, and myself. Phyllis Vidler, National Vice President, was also there. Representing other Michigan Chapters were Chapter 78's (Computer Center) Damon Dixon and Linda Ricklefs; from Chapter 173 (Customs) Joseph Morin, Rodney Reamer, and James Hermes; and from Chapter 230 (Food and Drug Administration) Cheryl M. Monroe.

While there, the participants were addressed by House Majority Leader Steny Hoyer (D-MD) and Congressman Chris Van Hollen (D-MD), as well as Senate and House committee staff members.

Among the legislative agenda items are:

- Fair Pay for Federal Employees
- Federal Employee Health Benefits Program and Health Care Affordability
- Eliminate Unfair Social Security Offsets
- Labor/Management Partnerships in the Federal Government
- Privatization

## Retirements



Mike Copeland, Cynthia Erickson, Pamela Graham, Brenda Kruyer, and Diane Petrowski  
Imminent retirees are Jim Thomas and Bill Boltrick in Farmington Hills.

### Turkey Drawings

As we have done every year, Chapter 24 held “Turkey Drawings” for its members for the holidays. Some of the lucky winners were: Deborah Stokes and Fouad Nona in Pontiac; Hattie Morant, Anne Dehne (Ann donated her “turkey to the Helping Hand Committee), and Therese Resser in Farmington Hills; Pauline Ketchum in Collection, and Karen Jorgensen in Examination in the Grand Rapids POD; Kathleen Hefner in Estate Tax; Jason Peters in East Lansing; Sharon Sloan in Mt. Clemens; Stephanie Basnight, Larimy Wilson, Lori Manns, Jerry Howell, and Misha Coleman in ACS;

### We Get Letters

“I really enjoyed the Phyllis article about retirement ready. Also, we can learn about the POD happenings from you. Great job.”

### In Our Opinion

#### Self-Assessment?

##### -Karen Johnson, Steward

On January 9, 2007, the “IRS Headlines...And More” e-publication ran a short piece promoting the Performance Self-Assessment Tutorial Web Site. This site provides a tutorial for writing self-assessments along with examples, resources, and references that enable employees to “prepare concise, descriptive, narratives that show their contributions to program and/or strategic objectives”.

NTEU Chapter 24 encourages employees to avail themselves of this valuable resource.

Article 12, Section 4B5, stipulates that employees who prepare a self-assessment shall be granted up to four hours of administrative time to do so. The self-assessment cannot exceed two pages in length, and must be submitted no

later than the last day of the end of their appraisal cycle.

All of this encouragement for self promoting has me wondering why the burden for a complete, concise, accurate description of employee contributions to program or strategic objectives is shifting from the manager to the employee? Is this a telltale sign that in order to receive recognition for contributions to program and/or strategic objectives, employees have to carry the load via self-assessment?

Employees are already subject to case consultations, case reviews, mid year progress reviews, and annual performance appraisals. With all this reviewing going on, one would think that the managers would be able to discern an employee’s contributions to the agency goals; yet managers tend to focus on what hasn’t been completed, not what has been accomplished. In recent years the shift has been to accentuate the negative.

I have seen managers take two or more weeks to conduct a case review and complete an annual appraisal. Nevertheless, employees are expected to prepare concise, descriptive narratives in four hours or less.

Managers appear to be overburdened by the review process. In my experience, I have seen them turn out a less than concise, descriptive narrative of an employee’s overall contributions. Maybe the answer isn’t to shift the burden for annual appraisals on the employees. Maybe the overall review process should be reevaluated and simplified. Hold managers accountable for preparing concise, descriptive, fair and balanced appraisals of their employee’s performance. Let employees do the work they are hired and paid to do without having to worry about self promoting their value to the Agency.

Our Union chapter will continue to support the self-assessment process. We feel it is a valuable resource for employees. It becomes especially helpful in defending employees in performance grievances. So, NTEU encourages employees to take the tutorial, and make it a point to prepare a self-assessment. The way things are going, if you don’t pat yourself on the back, no one else will.



**Firebird 24**

**Ronald Woytalewicz, President**

**Jeri Burger, Vice President**

**Marianne Gordon, Secretary**

**Henry Morrison, Treasurer**

**David Hauenstein, Editor**

**Chapter 24 Website, [www.nteu24.org](http://www.nteu24.org)**

**Caroline Trinkwalder**

