



## *Firebird 24*

*Reborn From Our Ashes*

*NTEU Chapter 24 Newsletter*

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**Volume 13**

**\*\*\* Member Edition \*\*\***

**March 2008**

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### **Your Weingarten Rights**

Weingarten is a 1975 decision by the U.S. Supreme Court, stating that an employee can request union assistance during an investigatory interview and can refuse to answer questions until the request is honored. If contacted by your manager or TIGTA where you feel you may be disciplined or terminated as a result of your answers, exercise your Weingarten Rights. Tell the manager or agent:

**“I request union representation. If my responses to your questions could lead to my being disciplined or terminated, or adversely affect my personal working conditions, I respectfully request that you summon my union representative. Until my representative arrives, I prefer not to answer any questions.”**

If necessary, print this portion of the newsletter and keep it in your wallet, purse, or wherever.

### **President’s Corner**

#### **-Chapter President Jeri Burger**

Happy Anniversary NTEU and NTEU Chapter 24! NTEU will be celebrating its 70<sup>th</sup> anniversary this year. Chapter 24 plans to celebrate the occasion as part of our Labor Recognition week activities. Chapter 24 is also celebrating an anniversary – our 66<sup>th</sup>. Chapter 24 was chartered by the National Association of Employees of Collectors of Internal Revenue (NAECIR) on January 24, 1942. In 1952 NAECIR merged with the National Federation of Federal Employees (NFFE) to become the National Association of Internal Revenue Employees (NAIRE). Then in 1973 NAIRE changed its name to the National Treasury Employees Union (NTEU). One guid-

ing principal has remained throughout NTEU’s evolving history – securing and defending member’s rights in the workplace.

A big “thank you” to the attendees of this year’s Legislative Conference in Washington DC; our Legislative Coordinators **Kathy McHugh** and **Susan Doolittle**, accompanied by Chapter Vice President **Dan Itchue** and Treasurer **Henry Morrison**. Thank you for representing Chapter 24 at this very important event. NTEU targeted six legislative issues for the conference:

1. Labor-management Partnerships
2. Federal Pay, including opposition to Pay-for-Performance
3. Adequate agency funding and opposition to privatization of federal jobs
4. Federal Employee Health Benefits, including support for an increase in the level of government contributions, government contribution for dental and vision, and expansion of the Family and Medical Leave Act
5. Department of Homeland security issues, including repeal of One Face at the Border, support for collective bargaining rights, and abuses of the Career Intern Program
6. Retiree issues, including Social Security offsets, Flexible Spending Accounts for retirees and credit for FERS sick leave.

The best way to improve our benefits and working conditions is to become a part of the process! You can help support these issues by contacting your Representatives and Senators. The Capwiz site at [nteu.org](http://nteu.org) is an easy way to send an e-mail letter. Letters via mail and phone calls are also effective. Chapter 24 will continue to provide

updates on these and other legislative issues. You can always ask your steward for the latest

information as well.

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## **You, The Pending Health Care Crisis, and Lobbying Congress**

**-Daniel Itchue, Chapter Vice President**

The time to sound the claxon is now. Change is in the air. In a very few short months we as citizens will make an important choice regarding the direction our country takes when we cast our votes in November. We hope our elected officials will actually empathize with the plight and economic strains of the average citizen to the ballooning costs of health care and other staples (gasoline, food, housing, etc).

To this end, Chapter 24 sent a legislative lobbying team to Washington D.C the week of March 3<sup>rd</sup>. While we had many employee issues to discuss, I was particularly interested in the health care issue. Over the years, I've gone to Washington four times. Each time, I've asked our members of Congress this one simple question:

Why do major employers, such as GM, 3M, Mobile Oil, etc, put their overall health care plan out to bid, providing what are called economies of scale? It's much more cost effective to have one provider covering 100,000 employees than 100 providers each covering 1000 employees. Unfortunately, the federal government, one of the largest employers in the world, simply won't take advantage of the massive purchasing power at its disposal. Why? Surprisingly, most Congress people say, "That's an interesting question. However, federal employees have it pretty good compared to all of the uninsured out there". Well, duh! That's not what I asked. The federal government pays on average 72% of our premiums. If the government put our health insurance out to bid, like private industry (nationally, regionally, whatever) with multiple levels of coverage available to employees to choose from, any economist, accountant, or benefit plan administrator, would say premiums would drop significantly. With those savings, the government could contribute more toward the annual premium than the current average 72%. Surprisingly, nothing, absolutely nothing, has ever been done about this.

Nevertheless, the winds of change may be in the air.

In a way, federal employees ARE a lot better off than many working class citizens. The government DOES pay an average 72% of our health insurance premiums. However, there is significant room for improvement pending the wish-

ful hope that a national health care program materializes. According to **Mike Causey**, a well know and respected columnist on federal employee issues, "When it comes to paying health care premiums, postal workers pay less than other federal workers. They get the same, or better, coverage as employees with the IRS, Interior, or Agriculture. But, they pay about half as much for coverage". Why would that be the case? It seems patently unfair, doesn't it? According to Causey, the reason can be summed up in two words: "union contract". I think what he means is that the USPS employees are much more vocal, adamant, organized, and involved with their union than all other federal employee. Their membership rate and activism puts their employees in a unique and empowered position with USPS management. The USPS is also the most heavily unionized federal agency. It's a position that I feel we at IRS should continuously strive to attain.

Member involvement is absolutely essential to making our voice heard in the halls of Congress; these halls are the only ones that really matter. If we don't grab the ear of the Members that appropriate money, out of sight is out of mind. This was the goal of our annual trip to Washington. We need your involvement; your help; help us help you.

Why is the level of government contribution toward our insurance premiums so important if there is the real possibility of national coverage for everyone? Two reasons: First, the current administration has proposed to REDUCE the government's current share of health insurance premiums for workers who are retiring in the future. A lot of us will be retiring in the near future, right? They made the same pitch last year and fortunately, Congress ignored him. Most likely, they will again ignore him, but, who can be certain, especially in an election year. Second, just because a national plan MAY be proposed, the fight to pass it through Congress will be very, very difficult.

This brings me all the way back, full circle, to earlier appeals of mine: Activism, involvement, membership. Write or email your Congressperson. Let them know that we want, deserve, and demand a more commonsense approach to the administration of our health care plan. We should at least be equal to the union members of the Postal Service. Your opinion and your voice really do matter.

## Hails From the Chief

-Karen Johnson, Chief Steward

One of the primary responsibilities of all members of our chapter is to help build the Union's strength. We do this by recruiting members, serving our members to the best of our abilities, and working to improve the quality of our member's lives. These are the basic characteristics of unionism that distinguish a "union" from any other type of organization.

Members of our chapter need to keep in mind that our stewards are here to assist you. However, the overall strength of the union is solidified by strong member support.

The National Agreement is currently under renegotiation, but your rights as a member have not changed. The agreement is just that. It is an arrangement negotiated between the Agency and the Union. Get involved. Become an active member. Support the union organization that supports bargaining unit employees.

Our next general membership meeting in metro Detroit will be this Spring. Stay tuned for a detailed announcement. Please try to attend.

Kudo's to the following stewards for exemplary representational work: **Mary Cook**, East Lansing, **Gregory T. Wert**, **Kim Longstreet**, and **Henry Morrison** of Detroit, **Brenda Lowery**, **Brian Norton**, and **Acqueneese King**, Detroit, ACS.

## Lunch & Learn with U. S. Representative Dale Kildee

-Jessie Dawkins, Chapter Steward.

The Flint POD hosted a Lunch and Learn for its members with Representative **Dale Kildee** of Michigan District 5 on February 19. Also in attendance were Chapter President **Jeri Burger**, Legislative Coordinators **Kathy McHugh** and **Susan Doolittle**, and retired Chapter President **Ron Woytalewicz**. Some of the members' comments afterward were:

"I thought it was great. I'm impressed with the fact that Representative Kildee takes the time to visit and talk with us. He seems genuinely interested in our concerns."

"The meeting went well. I have always known Dale Kildee is a strong supporter of the IRS and government employees and appreciate this greatly."

"Lunch and learn was wonderful!! It's nice to know elected officials care."



Representative Kildee with Steward Jessie Dawkins

## Sound Off!

Got something you want to tell us or others about? Want to express your opinion anonymously? We'd really like to hear from you.

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

**"I've been a Revenue Officer for over 20 years and I can no longer carry the burden of guilt. I must confess what management has already blamed me for: I am responsible for the unpaid taxes of the cases in my inventory. I kept these honest, decent people from fulfilling their legal obligation. And yes, it was I on the grassy knoll in Dallas. And Jimmy Hoffa's body is in my basement freezer. It was I, not John Wilkes Booth, in Ford's Theater all those years ago. And I can no longer hide it any longer: I'm the one who framed Roger Rabbit!"**

## Why should a non-bargaining unit employee join NTEU?

-By Mary Cook, Member of the Board and Steward

The most recognizable thing any union does is collective bargaining on behalf of their members for things such as better pay, hours, and benefits. NTEU certainly does collective bargaining.

Probably the second most recognizable thing a union does is defending their member's rights under whatever contract they use. NTEU certainly does representational work.

Some employees of the Internal Revenue Service do not belong to what is referred to as the "bargaining unit". The nature of their job may not be conducive to collective bargaining; for example,

Criminal Investigation Division employees, managers, certain clerical positions such as Territory Manager's assistants, and some other positions such as a technical advisor in LMSB. These employees do not enjoy the protection of a union contract and often endure practices that are sometimes less than fair (e.g. involuntarily transferring a manager to another POD, etc.).

So why should one of these non-bargaining unit employees join NTEU? What's in it for them? NTEU's efforts have assisted in the election of an increasing number of Congressional representatives familiar with and supportive of a wide range of issues important to federal employees. ***Not just bargaining unit employees.*** NTEU was involved in the securing of locality pay for employees in PODs in areas that have a higher cost of living. This affects all employees in these PODs. ***Not just bargaining unit employees.***

NTEU has secured passage in the House of Representatives of legislation that would kill the misguided IRS program of contracting out tax collection. Those that would be affected by contracting out of these jobs were not just the Revenue Officers; it would also affect the managers of Revenue Officers and their support staff. ***Not just bargaining unit employees.*** Some non-bargaining unit employees think: I can take care of myself; I don't need the union. Could these employees have negotiated AWS or locality pay on their own? I think not.

NTEU is more than member discounts. Although all employees enjoy some of the victories won by NTEU (AWS or locality pay or yearly pay increases or overtime), not everyone pays for them. The non-member's colleagues who are union members are paying their share of the tab. It costs money to lobby Congress and negotiate agreements. Federal employees are under attack now more than ever and our collective energies must be directed at those who oppose us.

Non-bargaining unit employees can pay their union dues directly to NTEU rather than through payroll deduction. Any Chapter 24 steward would be happy to assist a non-bargaining unit employee sign up and become a member. There are many aspects of what NTEU does daily that encompasses all employees regardless of their position within the Agency. A strong union benefits all. ***Not just bargaining unit employees.***

## Community Service Committee

**-Karen Johnson, Chief Steward and  
Member of the Board**

Our chapter has established a Community Service Project Committee. The committee members volunteered to serve as coordinators for upcoming community service projects that our chapter selects for participation. We are looking for projects that benefit the entire State of Michigan, not just the Metro area. This is an exciting opportunity for us to participate and give back to the community in which we all work and live.

As Chief Steward, I will serve as Chairperson. The other committee members are: Stewards **Brenda Lowery**, ACS, **Acqueneese King**, ACS, **Mary Cook**, Easy Lansing, **Greg Wert**, Detroit McNamara Building, and **Cynthia Harris** and **Ella Porter** of Farmington Hills. Look for upcoming announcements in future editions of [Firebird 24](#) describing the projects the committee recommends we support.

## Member/Non-Member Newsletters

You may have noticed that the last two newsletters were "General Editions" rather than member/non-member. Why do we have member/non-member editions, and why didn't we the past two editions?

It is no secret to us that most non-members can get their hands on Member Editions of the [Firebird](#) if they want; friendships within IRS are not, and should not, be based solely upon membership in the union. However, members should always keep in mind that they are subsidizing non-members. Non-members get most of the same benefits and protections provided by the union without paying for it. Just as Illegal Tax Protestors—we can use that expression here—still get the same protections and benefits provided by the United States Government. So why join the union? Webster's II New Riverside University Dictionary (courtesy of the U. S. Government) defines *Union* as, "A combination so formed, especially an alliance or confederation of people, parties, or political entities for mutual interest or benefit." ***Mutual interest or benefit.*** Non-members have interest in and benefit from what the union does for all employees; they simply don't pay for it.

We provide a "Members Edition" of the newsletter in which we include articles that can be of great importance to our members. We do not include some of these articles in the "Non-Member" version because we feel if they have not paid for the mutual benefit, they should not be

entitled to it. And in a small way, it is our way of rewarding those employees who are members. So the next time you decide to share a "Members Edition" with a non-member, maybe you should at least ask them to reimburse you for some of the dues you pay to NTEU. Or maybe you could ask them to join the alliance; it's to everyone's mutual interest or benefit.

## Steward in the Spotlight



### Reese Scripture

I joined the Service in 2005 in Employee Plans. My prior career focused on the nonprofit sector in a variety of activities including grant writing, program management, and accounting services. I love my work in Employee Plans and became a union steward because, as a new employee, union service is a good way to learn more about how the Service functions and to serve my co-workers.

### New Stewards

In addition to the four new Chapter 24 Stewards appointments announced in the last issue (**Jesse Dawkins**, **Donna Jones**, **Reese Scripture**, and **Greg Wert**), two additional stewards have been appointed in ACS. They are **Acqueneese King** and **Brian Norton**. **Orlando Mask** has accepted stewardship in LMSB.

In the IRS TODAY for November/December 2007 - Page 2, first article, "Atta Boys!" and "You Go, Girls!" Anybody notice that in this section that is showing the different awards in different sections/divisions, there is nothing about any awards for SB/SE Collection Division? Is this an error, just a small boo-boo, or is this showing what SB/SE really thinks of its employees and how we are treated?

-Timmierae Sharp-Boyd, Chapter Steward

## Reflecting Back -Ron Woytalewicz, retired Chapter 24 President

I started with IRS in June of 1974, and retired January 3, 2008. During my years with the Service, I was fortunate to do many different things. I also appreciated the value of further education and how that furthered my career with IRS, and outside it. I began as an Office Auditor in the old Cadillac Tower in Detroit. While with Internal Revenue, I was also a Revenue Agent, Instructor, Lead Instructor, on the Review Staff, Coordinator Agent Program (something like a coach), and Facilitator. As a Tax Auditor and Agent, I worked in Taxpayer Service during filing season—I remember working past midnight on April 15<sup>th</sup> in Pontiac, helping people with their returns. I also worked on the CPE Committee for both the general program and Large Case. I was also an Expert/Summary witness and was assigned to several criminal trials. The conviction of a defendant gives one a profound appreciation of the job and what it can accomplish. I also was the first in Michigan to propose preparer penalties. The biggest case I ever worked was against two attorneys who were former Revenue Agents. This audit began in 1981, led to 38 summonses, testifying in District Court as well as Tax Court, being named a defendant in a civil suit, harassing phone calls, and threats at home. My last appearance to testify on this case was in 1989—talk about overage!

My involvement with NTEU began very early in my career. I joined NTEU during my orientation week with IRS. I have always believed in Unions and the strength of collective bargaining. My dad belonged to the UAW. In 1986, I became a Steward in Pontiac with the retirement of Steward **John Geukes**. In 1991 I ran for and was elected to the Board of Directors. I was re-elected twice, serving a total of six years. In 1997, I was elected Executive Vice President. I remained in that position as it evolved into a full-time position. I was also appointed Assistant Chief Steward for Exam. In 2003, with the pending retirement of Chapter President **Phyllis Vidler**, I reluctantly ran for President and won. I was unopposed for President in 2005.

I have enjoyed my work with NTEU. I worked to strengthen our Chapter, its membership, and to protect the hard won rights of our employees. From my perspective, I have come to appreciate the excellence of the people working in Michigan. Few parts of the country enjoy the work

ethic, professionalism, and kindness of the people in Michigan. Managers who have traveled appreciate this, but rarely state such, and even more rarely publicly recognize the fact.

My future looks busy. I board horses, run a storage business, own an apartment building, and do a little bee-keeping. Perhaps I will brew some mead, too. I have fishing boat that has been out of the water for 12 years. I have my CPA license fully restored; I may be seeing a few of you from across the table soon. I am also President of the Detroit District Benevolent Fund.

In retrospect, I believe I have had a very fulfilling and interesting career. I was lucky to be working in LMSB; the other two divisions seem much less concerned about their employees. The Service seems to have gotten very mean spirited toward its employees in the last several years. I hope a new Commissioner and President may change that. I always found the work interesting, but the organization can drive you nuts. That's why we have a Union.

I want to wish all my friends and acquaintances good luck and Godspeed toward retirement. If you wish to drop me an email, I'm at [R.Edward@charter.net](mailto:R.Edward@charter.net).

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## **RETIRING? WHAT ARE YOU GOING TO DO WITH YOUR TSP?**

**-Victor Jackson and Phyllis Vidler**

As you prepare for retirement you begin to wonder what to do with your Thrifty Savings Plan. Upon retirement you become eligible to withdraw your TSP account. Upon separation you should receive a package of withdrawal information. After the agency notifies the TSP Service Office that you have separated, the office will send you a comprehensive packet of information about your options and the forms needed to make an election.

One of the first decisions you must make is: Do I need the money immediately? And the second decision is: Do I want to leave it with the TSP or rollover into an IRA, or other eligible plan? If you do not need the money immediately, you can leave it in the TSP and let it grow. If you choose to roll it over to an IRA, the rollover must be a direct transfer to a traditional IRA or any other eligible plan. The monies are direct rollovers and are not payments to you and therefore are not taxable until you receive payments from that IRA or plan.

The taxation of TSP withdrawal options are complex and may differ depending on the option you choose, so you should also read the tax in-

formation notice "Important Tax Information About Payments From Your TSP". This document does not have an IRS number.

In addition to the tax that you must pay on TSP distributions, in certain situations you must pay an early withdrawal penalty of 10% of the total amount you receive directly from the TSP. Generally, the penalty tax will apply on TSP distributions you receive before you become 59 ½. However, the penalty tax does not apply in all situations and you should check them out carefully.

If you choose to leave your money with the TSP, you have several options available to you.

The TSP offers 3 types of basic annuities:

Single life

Joint life with spouse

Joint life with someone other than your spouse.

If you do not want an annuity, the TSP provides several ways to withdraw your account:

Partial withdrawal of your account in a single payment

Full withdrawal of your account

You can specify a withdrawal at some future date

Or you do not have to do anything with your account at this time. You can leave it with the TSP and watch it grow.

It is extremely important for you to keep your beneficiary designation current in order to ensure that TSP officials will be able to locate your heirs to pay the distribution upon your death. If there are any changes in your family status, such as marriage, death, divorce, or birth of a child, you may want to make changes in your beneficiary designation.

If you do not want to withdraw any of your account balance when you retire, you can leave the entire amount with TSP. However, you must withdraw the entire balance or start receiving monthly payments by April 1 of the year following the year you turn 70 ½.

For example, my 70<sup>th</sup> birthday would be 7/11/2017, so I would turn 70 & 1/2 in January, 2018. I would have to start receiving minimum distributions by 4/1/2019. Vic and I have given you some of the important information about the thrift savings but you need to research yourself and this is the website for the thrift, [www.tsp.gov](http://www.tsp.gov).

Vic and I would like to hear from our readers, as to what topics they would like us to write about in the future.

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Revenue Officer Peggy Pirhonen was the winner in East Lansing of the NTEU Chapter 24 Holiday Drawing. Peggy decided that since all NTEU members were winners; she spent her \$25 gift card on snacks and pop and hosted a members-only snack buffet on January 24, 2008. Peggy greeted each participant with a "Thank You for being a Union member". Thank You Peggy, for sharing and being a Union member.  
-Mary Cook, Member of the Board & Steward

**Valentine's Day**  
**-Ella Porter, Steward**

I was everyone's sweetheart on February 14<sup>th</sup>. I provided donuts for all of the Revenue Officer groups. I did not want anyone to feel they did not have a Valentine smile for the day. We are not permitted time for any fun; every week we get a list of the group's overage, potential overage, and now potential potential overage.

**Retirements**

**Hazel Estel** retired on January 31, 2008, from Stakeholder Partnerships, Education, and Communication (SPEC). Hazel was with the Service for 32 years, and was serving as the Management Assistant at the time of her retirement. Many of you probably remember Hazel and her warm smile, when she would log in your return for the Employee E-File Program on the 24th floor. A luncheon with the SPEC staff was held in her honor on January 30th.

**-Janice Williams-Littlejohn, Steward**

**Susan Zimmerman** retired the end of February. Her last day in the office was 2/22. We had an office potluck to send her off in style. Her plans include a trip to Florida with her husband, to avoid the rest of this Michigan winter and a trip to Connecticut in June, to welcome her newest grandchild, due then. Sue has been a longtime member of NTEU, and will receive Chapter 24's congrats and gifts, as well as the best wishes of her colleagues in Saginaw.

**-Marcia Pratt, Steward**

**Dona Boman** and **Rick Feldman**, Revenue Officers in the Pontiac POD, also retired this quarter.

**Thrift Savings *Punishment*?**

**By Greg Wert**

The Thrift Savings Board (TSP) Board is request-ing public comments regarding the proposed change from unlimited daily transfers

to two per month. The March 10<sup>th</sup> Federal Register out-lines several reasons for the proposed changes.

There are several key flaws in the notice: TSP believes that a few "frequent traders" can affect the net asset value of the **I Fund** and the **C Fund**? The market is the sum of activity by investors all over the world, and if the collective sentiment is negative then the values will go down, but not solely because of a group of federal employees.

Furthermore, a comparison of the TSP to several of the worst retirement plans (of the thousands available) is specious. Why isn't there a comparison to some of the best retirement plans, as available through Merrill Lynch, along with the Chrysler Corporation model? Chrysler employees are allowed to buy any product that Merrill Lynch sells. In comparison, our plan fails miserably. Merrill Lynch and its competitors offer these cafeteria style plans to anyone.

Please don't forget that the TSP is not a mutual fund, so the Board is comparing apples to oranges. The TSP offers four index funds. There is no active management in an index fund, which is why the costs are so low. Mutual funds have professional traders who try to beat the market, not just equal the market returns. These traders have huge salaries and costs to their funds.

Finally, TSP tries to have the trading cost issue both ways. They claim to have the lowest costs of any retirement plan, then they claim that trading has to be limited because of excessive costs! What chutzpah. Do we have the lowest costs or not? If we are going to criticize individual costs, why not include the cost of DVD mailers that got thrown into the trash? How much did that cost? In conclusion, I am against any of the proposed changes and would request that the TSP board initiate efforts to create self directed investing, as currently exists for millions of other workers in America.

Anyone may fax their comments on this issue to Thomas Emswiler at 202-942-1676, by April 9, 2008.

**Editor's note:**

We received a lot of contributions from Chapter 24 Stewards for this edition, including a lot of pictures. Unfortunately, we could not include all of these in the newsletter simply because of space. I hope this does not discourage future contributions, and sincerely thank those contributors.

## Holiday Open House

-Daniel Itchue, Chapter Vice President & Steward

On Tuesday, December 4<sup>th</sup>, NTEU Chapter 24 hosted the first ever holiday open house for our members in the McNamara Building. Over 50 members dropped by and shared in the holiday spirit; fun was had by all.

Special thanks go out to **Karen Johnson**, **Timmie Sharp-Boyd**, and **Jeri Burger** for supplying tons of goodies, coffee, juice, and bagels. Ladies, you did a fantastic job. Unfortunately, I think I gained about five pounds, but it was fun nibbling on the snacks.

I hope this is the first in what becomes a tradition throughout the Chapter, sharing the fellowship of the Holiday Season.



**Firebird 24**

**Jeri Burger**, President  
**Daniel Itchue**, Vice President  
**Marianne Gordon**, Secretary  
**Henry Morrison**, Treasurer  
**Karen Johnson**, Chief Steward

**David Hauenstein**, Editor

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

**NTEU**  
The National Treasury Employees Union