



March 15, 2000

Mr. Cliff Guffey  
Director  
Clerk Division  
American Postal Workers  
Union, AFL-CIO  
1300 L Street, NW  
Washington, DC 20005-4128

Dear Cliff:

After consulting with the APWU regarding the training, testing, and practical demonstration of skills for Business Mail Entry Unit (BMEU) positions, the following is how the new training will be administered. Senior bidders for BMEU positions must view the job preview video and successfully complete the training course, *Introduction to Business Mail Entry*. Then they must pass Test 425, Business Mail Entry Prerequisite. With regard to Test 714 (data entry), we will maintain the status quo. In other words, for mailing requirements clerk positions, it will remain a mandatory requirement. For bulk mail clerk and bulk mail technician positions, it will remain a local option.

Bidders who successfully complete all of the above components will then attend training at the Business Mail Academy, NCED, Norman, Oklahoma. Upon graduating from the academy, they will be considered qualified for the job on which they bid. They will receive further on-the-job training when they report to their work unit.

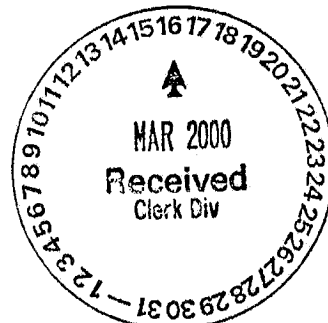
The implementation of the training as described above does not preclude the Postal Service from revising this training in the future in accordance with the collective bargaining agreement.

If there are any questions concerning this matter, please contact Curtis Warren of my staff at (202) 268-5359.

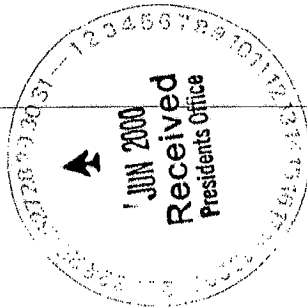
Sincerely,

A handwritten signature in black ink, appearing to read "P. Sgro".

Peter A. Sgro  
Manager  
Contract Administration



LABOR RELATIONS



June 21, 2000

Cert.#7000 0600 0020 9736 8943

Mr. Moe Biller  
President  
American Postal Workers  
Union, AFL-CIO  
1300 L Street, NW  
Washington, DC 20005-4128

Dear Moe:

As a matter of general interest, enclosed is a proposed Management Instruction (MI), Business Mail Academy Program, EL 720-2000-X.

This MI is intended to provide information about the use of the Business Mail Academy Training Program, which replaced the Standard Mail Classification Training Program.

The Business Mail Academy Training Program supersedes all existing programs for training employees entering Bulk Mail Clerk, Bulk Mail Technician, and Mailing Requirements Clerk positions, and is the only training program that may be used.

If you have any questions regarding this matter, please contact Curtis Warren of my staff at (202) 268-5359.

Sincerely,

A handwritten signature in black ink, appearing to read "Peter A. Sgro".

Peter A. Sgro  
Manager  
Contract Administration

Enclosure

# DRAFT

# Management Instruction

## BUSINESS MAIL ACADEMY TRAINING PROGRAM

Date:	April xx, 2000
Effective:	Immediately
Number:	EL-720-2000-x
Obsoletes:	EL-730-85-3
Unit:	Employee Development

Yvonne Maguire,  
Vice President  
Employee Resource Management

### PURPOSE

This instruction informs officers, executives, and managers at Headquarters, areas, and districts about the policy for use of the Business Mail Academy Training Program, which replaced the Standard Mail Classification Training Program and its accompanying qualifying exam, Postal Service Test 480, that were discontinued February 11, 2000.

This new training program changes the process in which senior bidders, or senior bidders for relief assignments, for the following positions, attend training and ultimately qualify for them:

- a. Bulk mail clerk.
- b. Bulk mail technician.
- c. Mailing requirements clerk.

**Note:** For the purposes of this training program, a *relief assignment* is an assignment in which handling business mail in a relief capacity is indicated in the bid posting.

### Policy

#### General

The Business Mail Academy Training Program supersedes all existing programs for training employees entering these positions and is the only training program that may be used. The program is in accordance with the *Employee and Labor Relations Manual* (ELM) issue 15, chapter 7, section 720, and applicable provisions of Article 37 of the USPS / APWU National Agreement.

#### Deferment Period

Article 37 allows senior bidders for these positions to be deferred from permanent assignment until they have successfully completed components 1 through 6 listed below. The deferment period begins with the identification of the senior bidder and ends when the results of Postal Service Test 427 (component 6) are received.

## Description

The Business Mail Academy Training Program consists of seven components listed in the left-hand column below. These components are addressed in the *Business Mail Academy Training Program Administrator's Guide* (course number 57601-02) and are to be provided in the order given. Qualified bidders will attend on-the-job training (component 7).

	What component is offered?	Is component required for bulk mail clerk?	Is component required for bulk mail technician?	Is component required for mailing requirements clerk?	Where is the component administered?
1.	<i>Working in Business Mail Entry: A Job Preview for Clerks (video)</i>	Required	Required	Required	Locally
2.	Postal Service Test 714, <i>Data Entry</i>	Local option	Local option	Required	Locally
3.	<i>Introduction to Business Mail Entry</i>	Required	Required	Required	Locally
4.	Postal Service Test 425, <i>Business Mail Entry Unit</i>	Required	Required	Required	Locally
5.	<i>Business Mail Academy</i>	Required	Required	Required	National Center for Employee Development (Norman, OK)
6.	Postal Service Test 427, <i>Business Mail Academy</i> .	Required	Required	Required	National Center for Employee Development (Norman, OK)
7.	<i>On the Job Training for Business Mail Academy Graduates</i>	Required, but not for qualification	Required, but not for qualification	Required, but not for qualification	Locally

## Application

Any employee identified as senior bidder, or a senior bidder for relief assignment, that is assigned to the following positions must successfully complete the first 6 components listed above to qualify for the job.

Employee	Level	Occupational Code
Bulk mail clerk	PS-5	2320-15xx
Bulk mail technician	PS-6	2320-28xx
Mailing requirements clerk	PS-5	2345-32xx
Mailing requirements clerk	PS-6	2345-32xx

## Exceptions

An employee identified as the senior bidder is deemed *already qualified* if any one of the following statements is true:

- The employee's "live record" indicates that he/she is qualified in accordance with Article 37.1.L of the National Agreement.
- The employee has successfully completed the (now-obsolete) Standard Mail Classification Program and passed Postal Service Test 480 (now obsolete) within the last 5 years.
- The employee has successfully completed the Business Mail Academy Training Program and passed Postal Service Test 427 within the last 5 years.
- The employee has held a relief bid assignment for a bulk mail clerk position, mailing requirements clerk position, or bulk mail technician position within the last 5 years.

If any of the above exceptions are true, the senior bidder need not requalify. He or she may be required to attend brush-up training in accordance with Article 37.1.M and with the Brush-Up Training Memorandum of Understanding of the National Agreement, paragraph II.G.

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# American Postal Workers Union, AFL-CIO

## Memorandum

Telephone  
(202) 842-4230

1300 L Street, NW  
Washington, DC 20005



From the Office of THOMAS "TOMMY" THOMPSON  
*T.T.T.* Assistant Director, Clerk Division

October 28, 1999

TO: Regional Coordinators &  
National Business Agents, Clerk Division

RE: Sales & Service Associate Training Program  
Segmented Inventory Accountability  
Business Mail Academy Training Program (B.M.A.T.P.)  
POS ONE Retail and Message Center

### Sales & Service Associate Training Program

The new Sales & Service Associate Training Program replacing the old Standard Window Training Program has been completed and should commence January 2000.

I would like to thank the following members of the American Postal Workers Union Committee for their time, devotion and commitment to the development of this program:

Mary Hogarty, Boston Metro Area Local  
John Palmer, Phoenix Metro Area Local  
Willie Mellen, State President Minneapolis, MN  
Ben Lyons, National Business Agent, Oklahoma City, OK

Regional Coordinators &  
National Business Agents, Clerk Division  
October 28, 1999  
Page-TWO

### **Segmented Inventory Accountability**

Segmented Inventory Accountability is expanding their Pilot Sites (see attached list of sites).

We had three members on this committee including myself. The other two were Mary Hogarty, Boston Metro Area Local and Myrna Garcia, New York Metro Area Local. We lost Myrna Garcia early on and Mary has been flying solo on this program. However, I hope to shift John and Willie to assist in the pilot sites.

### **Business Mail Academy Training Program (B.M.A.T.P.)**

The B.M.A.T.P. is intended to replace the Standard Mail Classification Training Program. The Postal Service went solo on this since they are moving the training academy to Norman, Oklahoma. The American Postal Workers Union has voiced objections early on. We have requested another meeting on the new training documents (see attached letter).

### **POS ONE Retail and Message Center (aka Bulletin Board)**

The POS ONE Message Center is an electronic bulletin board function of the POS ONE system. It will allow Retail and other functional areas to relay POS ONE and other corporate information directly to window clerks and their supervisors (see attached letter).

TLT:sec  
opeiu #2  
afl-cio

Attachments

LABOR RELATIONS



VIA CERTIFIED  
Z 203 878 260

October 8, 1999

456  
RECEIVED  
Office of the  
President  
OCT 13 1999  
18 19 20

Mr. Moe Biller  
President  
American Postal Workers  
Union, AFL-CIO  
1300 L Street, NW  
Washington, DC 20005-4128

Dear Moe:

This is to notify you that the Postal Service will expand the number of Segmented Inventory Accountability (SIA) pilot test sites.

In addition to the seven original pilot sites, enclosed is a listing of 44 current POS ONE sites throughout the Southeast and Midwest Areas that will be converted to SIA this year.

If there are any questions concerning this matter, please contact Curtis Warren of my staff at (202) 268-5359.

Sincerely,

A handwritten signature in dark ink, appearing to read "P. A. Sgro".

Peter A. Sgro  
Manager  
Contract Administration

Enclosure



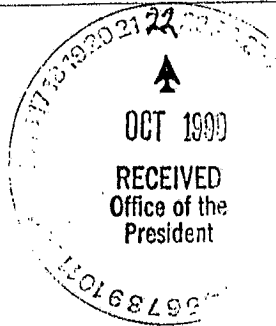
DISTRICT	SITE NAME	SITE ID
North Florida	Mandarin Station	3200095
	Jacksonville Beach	3200102
	St Augustine	3200031
	Orange Park	3200026
Central Florida	Lake Mary	3270019
	Boca Woodlands	3270107
	Palm Beach Garden Br	3270099
	Altamonte Springs	3270009
Suncoast	Largo MPO	3350061
	Clearwater MPO	3350176
	Brooksville-Springhill Br	3350171
	Brooksville MPO	3350169
Tennessee	Green Hills Sta	3700157
	Woodbine Sta	3700154
	Bellevue Sta	3700161
	Donelson Sta	3700156
Atlanta	Alpharetta	3000093
	Marrietta	3000015
	Sprayberry	3000016
	Lawrenceville	3000121
Northland	Loop Sta	5530886
	North St Paul	5530264
	White Bear Lake	5530265
	Woodbury	5530277
Central Plains	Millard Highlands	6800633
	Northwest Sta	6801086
	West Omaha Sta	6800627
	Elmwood	6800674
Milwaukee	West Racine Sta	5300245
	Racine MPO	5300243
	Kenosha	5300186
	Waukesha MPO	5300211
Gateway	Creve Coeur Br	6300532
	Clayton Br	6300502
	Hazelwood MPO	6300467
	Maryville Gardens ST	6300514
Mid-America	South Troost Sta	6400228
	Raytown	6400230
	N Kansas City Br	6400219
	Independence MPO	6400177
Hawkeye	Des Moines MPO	5000986
	South Des Moines Sta	5000197
	University Sta	5000196
	West Des Moines Sta	5000183

LABOR RELATIONS



October 18, 1999

VIA CERTIFIED  
Z 203 878 271



Mr. Moe Biller  
President  
American Postal Workers  
Union, AFL-CIO  
1300 L Street, NW  
Washington, DC 20005-4128

Dear Moe:

This is to inform you that the Postal Service is developing a Business Mail Academy training program; enclosed are drafts of the training program which will support the Academy. This new training program is intended to replace the Standard Mail Classification Training Program.

The new training documents consists of:

Administrator's Guide, Business Mail Entry Prerequisite Process

Participant's Workbook, Introduction to Business Mail Entry

Facilitator's/Instructor's Guide, Business Mail Academy

Participant's Guide, Business Mail Academy

The Business Mail Academy, located at the National Center for Employee Development (NCED), Norman, Oklahoma, will provide centralized training in a state-of-the-art learning environment. Students will also receive intensive hands-on-training in accepting and verifying business mailings and in using the PERMIT system.

A dry run of the new training program at NCED is planned from October 25 through November 5. A pilot test of the entire process is scheduled for the period November 8 through December 10.

If there are any questions concerning this matter, please contact Curtis Warren of my staff at (202) 268-5359.

Sincerely,

A handwritten signature in cursive script that reads "Daniel P. Magagnoli".

For  
Peter A. Sgro  
Manager  
Contract Administration

Enclosure

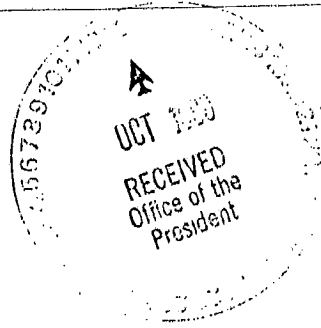
475 L'ENFANT PLAZA SW  
WASHINGTON DC 20260-4100

LABOR RELATIONS



October 8, 1999

VIA CERTIFIED  
Z 203 878 251



Mr. Moe Biller  
President  
American Postal Workers  
Union, AFL-CIO  
1300 L Street, NW  
Washington, DC 20005-4128

Dear Moe:

This is notice to you that the Postal Service plans to pilot a new function of the Retail POS ONE system, the POS ONE Message Center (a.k.a. Bulletin Board). A national rollout to all POS ONE sites would occur in late October.

The POS ONE Message Center is an electronic bulletin board function of the POS ONE system. It will allow Retail and other functional areas to relay POS ONE, Retail, and other corporate information directly to window clerks and their supervisors.

The Message Center will be implemented in two phases:

Phase I

During October 1999, Retail will pilot the basic Message Center functionality to 10 IBM and 10 NCR pilot sites. Once the functionality testing is concluded, Retail will rollout the Message Center nationally. In November, we will disseminate a questionnaire to the original twenty pilot sites to get feedback on the message content.

Phase II

Enhancements to the POS ONE Message Center is tentatively scheduled in March 2000 and June 2000, for IBM and NCR equipment, respectively. At that time the Message Center will take on a new look with added capabilities, which will include graphics functionality.

If there are any questions concerning this matter, please contact Curtis Warren of my staff at (202) 268-5359.

Sincerely,

A handwritten signature in black ink, appearing to read "P. Sgro".

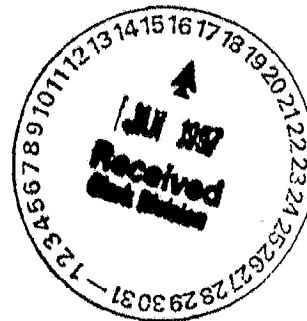
Peter A. Sgro  
Manager  
Contract Administration



UNITED STATES POSTAL SERVICE  
475 L'ENFANT PLAZA SW  
WASHINGTON DC 20260

January 9, 1997

Mr. James P. McCarthy  
Assistant Director  
Clerk Craft Division  
American Postal Workers Union, AFL-CIO  
1300 L Street, N.W.  
Washington DC 20005-4128



Re: F90C-4F-C 96018356  
Class Action  
Sunnyvale CA 94086-9998

Dear Mr. McCarthy:

On December 19, 1996 we met to discuss the above captioned grievance at the fourth step of our contractual grievance procedure.

The issue in this case involves whether management violated the National Agreement, when they allegedly failed to provide required training for bid position number 3107.

After reviewing this matter, we mutually agreed that no national interpretive issue is presented in this case.

The parties at this level agree the Standard Mail Classification Training Program is applicable to the training of employees who relieve or function on an ad hoc basis as bulk mail clerks. The Administrator's and Instructor's Guide, Development Series TD-179A, January 1995, states in pertinent part:

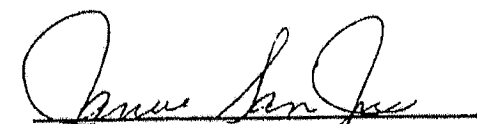
"Employees who relieve any of the above positions are also required to take this core training program in its entirety. Employees who are assigned bulk mail acceptance duties on an ad hoc basis should be trained according to their assignments and need not take the entire core."


Accordingly, we agreed to remand this case to the parties at Step 3 for application of the Standard Mail Classification Training Program based on the fact circumstances.

Please sign and return the enclosed copy of this decision as your acknowledgment of agreement to remand this case.

Time limits at Step 4 were extended by mutual consent.

Sincerely,

  
Janice San Jose  
Labor Relations Specialist  
Grievance and Arbitration

  
James P. McCarthy  
Assistant Director  
Clerk Craft Division  
American Postal Workers  
Union, AFL-CIO

Date: 1/21/97

LABOR RELATIONS



March 20, 2000

Mr. Cliff Guffey  
Director  
Clerk Division  
American Postal Workers Union  
AFL-CIO  
1300 14<sup>th</sup> Street, NW  
Washington, DC 20005-4128

Dear Cliff:

As discussed with Curtis Warren of my staff, enclosed are copies of revised qualification standards for Bulk Mail Clerk, PS-5 and Bulk Mail Technician, PS-6.

The qualification standards have been revised as follows: the mandatory examination requirement to successfully pass Postal Service Test 714 has been removed from both positions. However, Test 714 may still be administered as a local option.

If you have any questions concerning this matter, please contact Curtis at (202) 268-5359.

Sincerely,

A handwritten signature in black ink, appearing to read "P. Sgro".

Peter A. Sgro  
Manager  
Contract Administration

Enclosures



**BARGAINING UNIT QUALIFICATION STANDARD**  
**2345n**  
**(2320-28XX) BULK MAIL TECHNICIAN--LEVEL 6**

**DOCUMENT DATE:** March 17, 2000

**FUNCTION:**

Accepts, verifies, classifies, and computes postage on all classes of domestic and international business mail. Provides customer assistance to ensure customer's understanding of postal regulations, mail preparation requirements and methods of presentation.

*NOTE: Serves as a working leader to one or more employees on a tour. Works alone for approximately 75 percent of the time.*

**DESCRIPTION OF WORK:**

See the Standard Position Descriptions for the Occupation Code given above.

**REQUIREMENTS:**

This section is composed of Knowledge, Skills, and Abilities (KSAs) which are required to satisfactorily perform the tasks of the position. Applicants must demonstrate that they possess a sufficient level of each KSA, to include at least minimum competency for senior-qualified positions to enable them to perform these tasks satisfactorily. Applicants demonstrate these levels by describing examples of experience, education, or training, any of which may be non-postal. Ratings are based on the demonstration of the level of possession of each of the KSAs. Failure to demonstrate any KSA is disqualifying.

1. Ability to provide proactive customer service, as it relates to providing advice and/or information specific to the customer's individual mailing needs. Includes asking appropriate questions, listening to the customer and providing information or services, anticipating needs and volunteering information about changes in policies or procedures that may affect a customer's mailing.
2. Ability to communicate orally sufficient to express ideas or facts clearly and logically when answering questions, giving instructions or explaining complex postal regulations and procedures.
3. Ability to work and deal with people as it relates to interacting tactfully and respectfully with customers and coworkers. Includes dealing effectively and calmly with complaints, problems and difficult customers by exercising courtesy, etiquette and self-control at all times.

4. Ability to follow instructions, either oral or written, such as directions, instructions, equipment operating information, and directions included in forms or manuals (such as the *Domestic Mail Manual*), and applying relevant information as needed.
5. Ability to perform basic mathematical computations refers to performing basic calculations such as addition, subtraction, multiplication and division with whole numbers, fractions and decimals.
6. Ability to identify and analyze problems, including gathering necessary information and resources, evaluating and summarizing the information, and arriving at an appropriate recommendation or course of action.
7. Ability to work without immediate supervision.
8. Knowledge of business mail acceptance practices.
9. Ability to safely perform the duties common to the position.

#### **EXAMINATION REQUIREMENTS:**

When filled internally, this position usually involves a deferment period during which the senior bidder is provided appropriate combinations of training, testing, and practical demonstration of ability to perform in the actual position.

To be declared the senior bidder to begin training, the bidder must:

Successfully complete Postal Service Test 470, Configuration 1.

#### **TRAINING REQUIREMENTS:**

Applicants who qualify and are selected under this standard will be required to complete prescribed training satisfactorily.

#### **PHYSICAL REQUIREMENTS:**

Applicants must be physically able to lift mail sacks weighing up to 70 pounds.

#### **ADDITIONAL PROVISIONS:**

Applicants must have a valid state driver's license, and demonstrate and maintain a safe driving record. Applicants must pass the Postal Service road test to show the ability to safely drive a vehicle of the type used on the job.



**BARGAINING UNIT QUALIFICATION STANDARD**  
**2301**  
**(2320-15XX) BULK MAIL CLERK--LEVEL 5**

**DOCUMENT DATE:** March 17, 2000

**FUNCTION:**

Accepts, verifies, classifies, and computes postage on all classes of domestic and international business mail. Provides customer assistance to ensure customer's understanding of postal mailing standards, mail preparation requirements and methods of presentation.

**DESCRIPTION OF WORK:**

See the Standard Position Descriptions for the Occupation Code given above.

**REQUIREMENTS:**

This section is composed of Knowledge, Skills, and Abilities (KSAs) which are required to satisfactorily perform the tasks of the position. Applicants must demonstrate that they possess a sufficient level of each KSA, to include at least minimum competency for senior-qualified positions to enable them to perform these tasks satisfactorily. Applicants demonstrate these levels by describing examples of experience, education, or training, any of which may be non-postal. Ratings are based on the demonstration of the level of possession of each of the KSAs. Failure to demonstrate any KSA is disqualifying.

1. Ability to provide customer service, as it relates to providing advice and/or information specific to the customer's individual mailing needs. Includes asking appropriate questions, listening to the customer and providing information or services as required.
2. Ability to communicate orally sufficient to express ideas or facts clearly and logically when answering questions, giving instructions or explaining postal regulations and procedures.
3. Ability to work and deal with people as it relates to interacting tactfully and respectfully with customers and coworkers. Includes dealing effectively and calmly with complaints, problems and difficult customers by exercising courtesy, etiquette and self-control at all times.
4. Ability to follow instructions, either oral or written, such as directions, instructions, equipment operating information, and directions included in forms or manuals (such as the *Domestic Mail Manual*), and applying relevant information as needed.
5. Ability to perform basic mathematical computations refers to performing basic calculations such as addition, subtraction, multiplication and division with whole numbers, fractions and decimals.
6. Ability to identify and analyze problems, including gathering necessary information and resources, evaluating and summarizing the information, and arriving at an appropriate recommendation or course of action.
7. Ability to work without immediate supervision.

Qualification Standard 2301  
Bulk Mail Clerk--Level 5 (2320-15X)  
Document Date: March 17, 2000

8. Ability to safely perform the duties common to the position.

**EXAMINATION REQUIREMENTS:**

When filled internally, this position usually involves a deferment period during which the senior bidder is provided appropriate combinations of training, testing, and practical demonstration of ability to perform in the actual position. Sequencing of examinations is as follows:

To be declared the senior bidder to begin training, the bidder must:

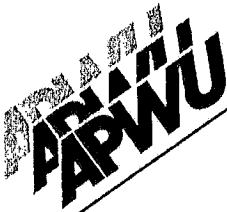
Successfully complete Postal Service Test 470, Configuration 1.

**TRAINING REQUIREMENTS:**

Applicants who qualify and are selected under this standard will be required to complete prescribed training satisfactorily.

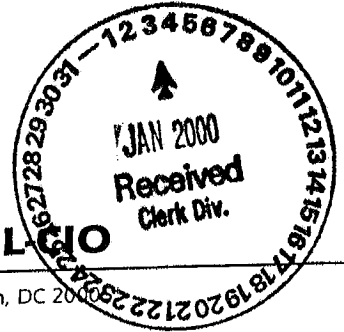
**PHYSICAL REQUIREMENTS:**

Applicants must be physically able to lift mail sacks weighing up to 70 pounds.



## American Postal Workers Union, AFL-CIO

1300 L Street, NW, Washington, DC 20004



December 28, 1999

C. J. "Cliff" Guffey  
Director, Clerk Division  
(202) 842-4234

Anthony Vegliante, Vice President  
Labor Relations  
Grievance & Arbitration  
United States Postal Service  
475 L'Enfant Plaza, S.W.  
Washington, D.C. 20260

Re: **APWU Position Statement on Article 19 Appeal to  
Arbitration --  
Qualification Standards for Bulk Mail Clerk, PS-5**

National Executive Board  
Moe Biller  
President

William Burrus  
Executive Vice President

Robert L. Tunstall  
Secretary-Treasurer

Greg Bell  
Industrial Relations Director

C. J. "Cliff" Guffey  
Director, Clerk Division

James W. Lingberg  
Director, Maintenance Division

Robert C. Pritchard  
Director, MVS Division

Dear Tony:

Pursuant to Article 19 of the National Agreement, the APWU hereby submits its position statement regarding its understanding of the issues involved and the facts giving rise to such issues in the Union's above-noted Article 19 appeal to arbitration.

A. Statement of the Appeal

On November 1, 1999, the APWU received a letter from Peter Sgro, Postal Service Manager for Contract Administration, transmitting revised qualification standards for the Bulk Mail Clerk, PS-5, position to the APWU. Mr. Sgro's letter indicated only that it was sent "as a matter of general interest" and that the language in the qualification standards had "been revised to reflect updated knowledge, skills, and abilities" in addition to requiring new prerequisite training.

APWU representatives met with Postal Service representatives who indicated only that the revised qualification standards for the Bulk Mail Clerk, PS-5, position would be put into effect.

By letter dated December 13, 1999, the APWU appealed the Postal Service's qualification standards for the Bulk Mail Clerk PS-5 position to arbitration pursuant to Articles 19 and 15 of the National Agreement.

Regional Coordinators  
Leo F. Persalls  
Central Region

Jim Burke  
Eastern Region

Elizabeth "Liz" Powell  
Northeast Region

Terry Stapleton  
Southern Region

Raydell R. Moore  
Western Region

Anthony Vegliante, Vice President  
Labor Relations  
December 28, 1999  
Page 2

B. Statement of the Issues

(1) Under Article 19 of the National Agreement, the Postal Service is obligated to furnish the APWU with notice of proposed changes that directly relate to wages, hours, and working conditions. The issuance of revised qualification standards for positions within an APWU bargaining unit is directly related to wages, hours, and working conditions and the Postal Service is therefore obligated to provide the APWU with proper notice thereof. To be sufficient under the National Agreement, any notice provided by the Postal Service must indicate the specific changes under consideration.

Mr. Sgro's letter transmitting a copy of the job description did not meet the requirements of Article 19. Although Mr. Sgro's letter indicates that the Postal Service has updated the knowledge, skills, and abilities ("KSAs") required of the position, it does not state what specific KSAs were being changed and the basis for their update. The Postal Service, therefore, has not met the notice requirements of Article 19. Accordingly, the Postal Service is precluded from implementing the qualification standards for the Mailing Requirements Clerk, PS-6, position.

(2) The "Examination Requirements" for the Mailing Requirements Clerk, PS-6, position include testing requirements that must be satisfied in order for an applicant to be declared the senior bidder for the position and eligible to begin training. The APWU believes that these prerequisites to becoming the senior bidder on a position are not fair, reasonable, or equitable.

The requirement that the senior bidder must be able to key data on a computer terminal is identical to the requirements addressed in the memorandum of understanding between the Postal Service and the APWU regarding "Bids With Required Computer Skills." Under the MOU, the Postal Service is required to provide senior bidders meeting the minimum qualification standards for a level 5 position that requires the running of computers five days of on-the-job-training before they are required to demonstrate their ability to work on the computer. The Postal Service's requirement in the Mailing Requirements Clerk, PS-6, position that the senior bidder be required to demonstrate typing skills on a computer without being provided the five days of on-the-job-training violates the principle behind the MOU and Article 347.3.F.7 of the National Agreement and is therefore not fair, reasonable, or equitable. Under Article 37.3.F.7, the senior bidder for the Bulk Mail Clerk position is entitled to receive training during a deferment period in all KSAs.

(3) Implementation of the qualification standards for the Mailing Requirements Clerk, PS-6, position would not be fair, reasonable, and equitable. Without having received the proper notice or a meaningful meeting as required by Article 19, it is difficult for the

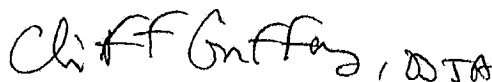
Anthony Vegliante, Vice President  
Labor Relations  
December 28, 1999  
Page 3

Bulk Mail Clerk, PS-5, position. The APWU therefore reserves the right to challenge the issuance and implementation of these qualification standards on other grounds.

C. Conclusion

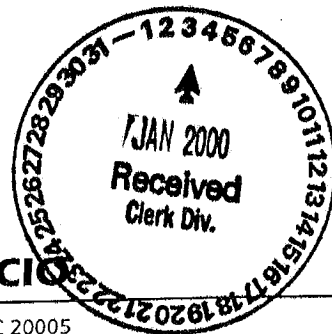
For the foregoing reasons, the APWU believes the Postal Service has violated the National Agreement with its qualification standards for the Bulk Mail Clerk, PS-5, position.

Sincerely,

A handwritten signature in cursive script that reads "Cliff Guffey, DSA".

Cliff Guffey  
Director, Clerk Division

CG:mkh



## American Postal Workers Union, AFL-CIO

1300 L Street, NW, Washington, DC 20005

December 28, 1999

C. J. "Cliff" Guffey  
Director, Clerk Division  
(202) 842-4234

Anthony Vegliante, Vice President  
Labor Relations  
Grievance & Arbitration  
United States Postal Service  
475 L'Enfant Plaza, S.W.  
Washington, D.C. 20260

Re: **APWU Position Statement on Article 19 Appeal to  
Arbitration --  
Qualification Standards for Mailing Requirements Clerk,  
PS-6**

National Executive Board  
Moe Biller  
President

William Burrus  
Executive Vice President

Robert L. Tunstall  
Secretary-Treasurer

Greg Bell  
Industrial Relations Director

C. J. "Cliff" Guffey  
Director, Clerk Division

James W. Lingberg  
Director, Maintenance Division

Robert C. Pritchard  
Director, MVS Division

Dear Tony:

Pursuant to Article 19 of the National Agreement, the APWU hereby submits its position statement regarding its understanding of the issues involved and the facts giving rise to such issues in the Union's above-noted Article 19 appeal to arbitration.

A. Statement of the Appeal

On November 1, 1999, the APWU received a letter from Peter Sgro, Postal Service Manager for Contract Administration, transmitting revised qualification standards for the Mailing Requirements Clerk, PS-6, position to the APWU. Mr. Sgro's letter indicated only that it was sent "as a matter of general interest" and that the language in the qualification standards had "been revised to reflect updated knowledge, skills, and abilities" in addition to requiring new prerequisite training.

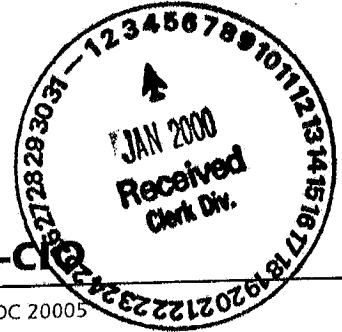
APWU representatives met with Postal Service representatives who indicated only that the revised qualification standards for the Mailing Requirements Clerk, PS-6, position would be put into effect.

By letter dated December 13, 1999, the APWU appealed the Postal Service's qualification standards for the Mailing Requirements Clerk, PS-6 position to arbitration pursuant to Articles 19 and 15 of the National Agreement.



## American Postal Workers Union, AFL-CIO

1300 L Street, NW, Washington, DC 20005



December 28, 1999

C. J. "Cliff" Guffey  
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(202) 842-4234

Anthony Vegliante, Vice President  
Labor Relations  
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United States Postal Service  
475 L'Enfant Plaza, S.W.  
Washington, D.C. 20260

**Re: APWU Position Statement on Article 19 Appeal to  
Arbitration --  
Qualification Standards for Bulk Mail Technician, PS-6**

National Executive Board  
Moe Biller  
President

William Burrus  
Executive Vice President

Robert L. Tunstall  
Secretary-Treasurer

Greg Bell  
Industrial Relations Director

C. J. "Cliff" Guffey  
Director, Clerk Division

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Director, MVS Division

Regional Coordinators  
Leo F. Persalls  
Central Region

Jim Burke  
Eastern Region

Elizabeth "Liz" Powell  
Northeast Region

Terry Stapleton  
Southern Region

Raydell R. Moore  
Western Region

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**A. Statement of the Appeal**

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APWU representatives met with Postal Service representatives who indicated only that the revised qualification standards for the Bulk Mail Technician, PS-6, position would be put into effect.

By letter dated December 13, 1999, the APWU appealed the Postal Service's qualification standards for the Bulk Mail Technician, PS-6 position to arbitration pursuant to Articles 19 and 15 of the National Agreement.

Anthony Vegliante, Vice President  
Labor Relations  
December 28, 1999  
Page 2

B. Statement of the Issues

(1) Under Article 19 of the National Agreement, the Postal Service is obligated to furnish the APWU with notice of proposed changes that directly relate to wages, hours, and working conditions. The issuance of revised qualification standards for positions within an APWU bargaining unit is directly related to wages, hours, and working conditions and the Postal Service is therefore obligated to provide the APWU with proper notice thereof. To be sufficient under the National Agreement, any notice provided by the Postal Service must indicate the specific changes under consideration.

Mr. Sgro's letter transmitting a copy of the job description did not meet the requirements of Article 19. Although Mr. Sgro's letter indicates that the Postal Service has updated the knowledge, skills, and abilities ("KSAs") required of the position, it does not state what specific KSAs were being changed and the basis for their update. The Postal Service, therefore, has not met the notice requirements of Article 19. Accordingly, the Postal Service is precluded from implementing the qualification standards for the Bulk Mail Technician, PS-6, position.

(2) The "Examination Requirements" for the Bulk Mail Technician, PS-6, position include testing requirements that must be satisfied in order for an applicant to be declared the senior bidder for the position and eligible to begin training. The APWU believes that these prerequisites to becoming the senior bidder on a position are not fair, reasonable, or equitable.

The requirement that the senior bidder must be able to key data on a computer terminal is identical to the requirements addressed in the memorandum of understanding between the Postal Service and the APWU regarding "Bids With Required Computer Skills." Under the MOU, the Postal Service is required to provide senior bidders meeting the minimum qualification standards for a level 5 position that requires the running of computers five days of on-the-job-training before they are required to demonstrate their ability to work on the computer. The Postal Service's requirement in the Bulk Mail Technician, PS-6, position that the senior bidder be required to demonstrate typing skills on a computer without being provided the five days of on-the-job-training violates the principle behind the MOU and Article 37.3.F.7 of the National Agreement and is not fair, reasonable, or equitable. Under Article 37.3.F.7 the senior bidder for the Bulk Mail Clerk position is entitled to receive training during a deferment period in all KSAs.

(3) Implementation of the qualification standards for the Bulk Mail Technician, PS-6 position would not be fair, reasonable, and equitable. Without having received the proper notice or a meaningful meeting as required by Article 19, it is difficult for the



Anthony Vegliante, Vice President  
Labor Relations  
December 28, 1999  
Page 3

APWU to completely state its issues regarding the Postal Service's qualification standards for the Bulk Mail Technician, PS-6, position. The APWU therefore reserves the right to challenge the issuance and implementation of these qualification standards on other grounds.

C. Conclusion

For the foregoing reasons, the APWU believes the Postal Service has violated the National Agreement with its qualification standards for the Bulk Mail Technician, PS-6, position.

Sincerely,

A handwritten signature in dark ink, appearing to read "Cliff Guffey".

Cliff Guffey  
Director, Clerk Division

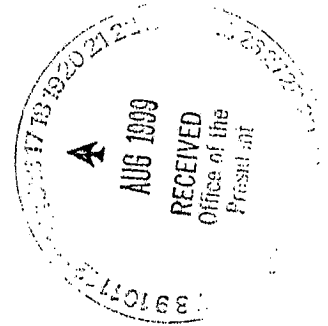
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LABOR RELATIONS



CERTIFIED Z 440 391 400

August 10, 1999



Mr. Moe Biller  
President  
American Postal Workers  
Union, AFL-CIO  
1300 L Street, NW  
Washington, DC 20005-4128

Dear Moe:

This is notice to you that the Postal Service has established a Business Mail Entry Unit (BMEU) Proficiency Program for FY 1999. There are still four (4) components of the program as it was in FY 1998, Mystery Caller, BMEU Survey, Training, and Employee Incentives.

The enclosed brochure explains each component in detail, along with any changes from last year's program.

If there are any questions concerning this matter, please contact Curtis Warren of my staff at (202) 268-5359.

Sincerely,

A handwritten signature in black ink, appearing to read "Peter A. Sgro".

Peter A. Sgro  
Manager  
Contract Administration

Enclosure

## Employee Incentives

In FY 99, we have changed the employee incentive program to better reflect the goals of the BMEU Proficiency Program -- to identify training needs and improve performance. Based on the results from FY 98 and focus groups of BMEU employees,\* the following changes will be made to the employee incentive program:

- Certification test is eliminated
- Incentives will not involve sizes
- Incentives will be awarded at the individual and district levels

## Rewards...Rewards...Rewards!

Level 1: *Individual Level -- Silver Lapel Pin / Training Certificate:*

Once you have completed the required training (16 hours technical skills and 8 hours interpersonal skills training)

Level 2: *District Level -- \$25 Gift Certificate / Gold Lapel Pin:*  
When 90% of the employees in your district complete the required training

Level 3: *District Level -- Choose Your Gift (from a book):*  
If your district meets its 10% improvement target (comparing BMEU Proficiency Index Q4 98 to Q4 99)

Level 4: *District Level -- \$50 Cash:*  
When both the 90% trained and 10% improvement targets have been met by the district

Level 5: *District/Area Level -- TBD:*  
For the most improved district in each Area

\* FY 99 incentives are based on the results of focus groups held with BMEU employees in Akron, New Orleans, and Central Florida.



## BMEU Proficiency Program Guide

for

Business Mail Entry Unit Employees



"Having the right people in the right place with the right tools at the right time to consistently provide Superior Customer Value!"

This brochure provides an overview of the BMEU Proficiency Program for Business Mail Entry Unit (BMEU) employees.

## BMEU Proficiency Program

As a *CustomerPerfect!* Voice of the Employee (VOE) goal, the BMEU Proficiency Program aims to measure the performance of the 4,800 BMEU employees and provide them with the tools needed to improve performance.

Almost 47% of the Postal Service's total revenue and 65% of total mail volume are handled by the employees at the approximately 2,000 BMEU offices. The BMEU Proficiency Program is therefore a critical part of the USPS strategy to enhance employees' skills through a national training program and communication initiative.

The goals of the BMEU Proficiency Program are to identify training needs by assessing the proficiencies of BMEU employees, develop and deliver training, and then measure improvement. There are four components of the program: Mystery Caller, BMEU Survey, Training, and Employee Incentives.

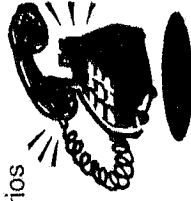
## FY 98 Results

- 82% of BMEU employees are trained
- 49% of BMEU employees receive incentive awards
- Interpersonal skills training needs are similar across the 85 districts
- Technical training needs are different across the nation
- Helpfulness improves as more employees are trained
- There is a strong relationship between the BMEU Proficiency Program, Customer Satisfaction, and Ease of Use

## Mystery Caller

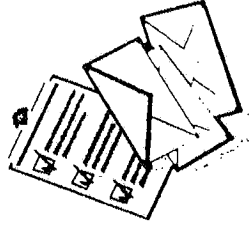
Mystery Caller is a performance measurement system that gauges the proficiency of BMEU employees by their responses to questions developed using real life customer inquiries. 250 calls, or 4 calls per day, are made to each district every Quarter. The responses are evaluated for accuracy, consistency, and helpfulness.

MYSTERY CALLS ARE NO MYSTERY! The scenarios are developed by a committee of BMEU Managers, Analysts, Supervisors, and Specialists. All of the questions are derived from publications that are readily available to BMEU employees at each work location.



## BMEU Survey

At the same time, BMEU customers are surveyed regarding their experience at the BMEU through the Customer Event-Based BMEU Survey. Questions relate to employee knowledge, consistency, and helpfulness. The survey also includes questions on facility cleanliness and the accessibility of parking and dock spaces.



## Training

The results from Mystery Caller and the BMEU Survey are rolled-up into the BMEU Proficiency Index. In FY 98, technical training needs were based on pilot results. This year, customized technical training programs are based on performance at the district level.

There are three required training courses for BMEU employees this fiscal year:

- ① 16 hours technical training
- ② 8 hours of interpersonal skills training
- ③ 16 hours of management skills training (for BMEU Managers, Supervisors, Specialists, and Analysts only)

