

**SUBJECT: IMPACT STATEMENT AND FUNCTION 4 REVIEW**

**ON NOVEMBER 25, 2002 THE UNION RECEIVED A WITHHOLDING NOTICE FROM THE SOUTHWEST AREA. THE NOTICE STATED THAT THERE WAS THE NEED TO WITHHOLD FULL-TIME VACANCIES DUE TO AN OPERATIONAL REVIEW THAT INDICATED THAT THERE WOULD BE TEN LEVEL 5 CLERKS EXCESS TO THE NEED OF THE INSTALLATION**

**THE UNION PROMPTLY REQUESTED A COPY OF THE OPERATIONAL REVIEW/ FUNCTION 4 REPORT THAT WAS SUPPOSEDLY USED TO DETERMINE THE AMOUNT OF EXCESS CLERKS IN FORT SMITH. THE POSTMASTER/OIC INFORMED THE UNION THAT HE HAD NEVER RECEIVED A COPY OF THE FUNCTION 4 REVIEW BUT WOULD REQUEST A COPY FROM THE SOUTHWEST AREA OFFICES. A COPY OF THE SOUTHWEST AREA FUNCTION 4 REVIEW WAS SUPPLIED TO THE POSTMASTER/OIC ON DECEMBER 13, 2002.**

**A COPY OF A FUNCTION 4 REVIEW WAS SUPPLIED TO THE UNION. (WE ARE NOT SURE THAT THIS WAS THE OPERATIONAL REVIEW RELIED ON TO ISSUE THE WITHHOLDING BECAUSE SOME OF THE NUMBERS FROM THE IMPACT STATEMENT DO NOT CORRESPOND TO THE FUNCTION 4 REPORT) NEVER THE LESS THE UNIONS FINDINGS CONCERNING THE FUNCTION 4 THAT WAS SUPPLIED TO THE UNION IS ADDRESSED BELOW.**

**THE FUNCTION 4 REVIEW WAS PERFORMED DURING AP 11-WEEK ONE, 2002. (JUNE 17-21, 2002). THE FUNCTION 4 TEAM WENT TO EACH STATION AND BRANCH. THE TEAM VISITED EACH OFFICE FOR TWO CONSECUTIVE DAYS NONE OF THE OFFICES WERE VISITED ON MONDAY AND ONLY ONE OFFICE WAS VISITED ON FRIDAY.**

**THERE WAS NO EXIT REPORT MEETING WITH THE STATION MANAGERS ON COMPLETION OF THE FUNCTION 4 AUDIT AND THE STATION MANAGERS WERE NEVER SUPPLIED WITH A COPY OF THE AUDIT.**

**THE MEMBERS OF THE TEAM MEASURED THE MAIL FOR BOTH UNIT DISTRIBUTION (LDC 43) AND BOX DISTRIBUTION (LDC 44) FOR BOTH DAYS THEY WERE IN THE OFFICE.**

**THE AVERAGE AMOUNT OF MAIL THAT THE TEAM RECORDED ON THOSE TWO DAYS WAS USED TO DETERMINE THE DAILY WORKLOAD FOR EACH OFFICE.**

**THERE ARE AT LEAST THREE PROBLEMS WITH THIS METHOD OF DETERMINING THE DAILY WORKLOAD.**

**1. THE AMOUNT OF MAIL VOLUME WAS DETERMINED "SOLELY" BY THE MEMBERS OF THE FUNCTION 4 TEAM. IN ALL CASES THE AMOUNT OF MAIL VOLUME THAT WAS RECORDED BY THE SUPERVISORS/ AND OR CLERKS WAS SIGNIFICANTLY HIGHER THAN THE TEAMS FIGURES. SOME OF THE DISCREPANCIES ARE AS HIGH AS 50%. THIS IS EVIDENT BY THE VOLUME RECORDING COMPARISON /VARIATION SHEETS. AT NO TIME WAS THESE DISCREPANCIES DISCUSSED WITH THE SUPERVISORS OR CLERKS THAT WERE RECORDING THE MAIL VOLUME.**

**2. THE AVERAGE OF WEEKLY MAIL VOLUME SHOULD BE USED TO DETERMINE THE DAILY WORKLOAD, NOT JUST TWO DAYS IN THE MIDDLE OF THE WEEK IN THE MIDDLE OF THE MONTH.**

**3. ADDITIONAL THE DAILY WORKLOAD SHOULD NOT BE DETERMINED BY THE MAIL VOLUME IN ONE PARTICULAR WEEK. IT SHOULD BE DETERMINED BY AN 8-WEEK AVERAGE.**

March 15, 2001

**MEMORANDUM FOR:** Vic Reagan, Postmaster  
Byrdstown, TN

**SUBJECT** Function 4 BPI

A function 4 (BPI) review was conducted in your office March 14 & 15, 2001. BPI (Breakthrough Productivity Initiative) is the roadmap to take us from where we are to where we need to be. BPI is a national program for controlling costs and achieving improvements in productivity. BPI calls for significant increases in productivity instead of small incremental change. It is vitally important for Breakthrough Productivity to become a reality in the postal service because of our changing marketplace.

The review at your office was conducted using the national standard expectations for productivity in all the work to be conducted in your office. According to the workload, your office has 6.62 hours daily (total workload for the office) if productivity is being achieved in distribution and on the window, as well as allied activities. My expectation is that actual postmaster work in your office will not exceed 4 hours on any given day, sometimes more and sometimes less, but over a year will not exceed this average. When you subtract your contribution, there is 2.62 hours per day for clerk work in your office.

The Byrdstown office has experienced many significant changes that have reduced the workload over the past couple of years, including receipt of 876 mail, elimination of local cancellations (forcing more mail to automation), earlier reporting time of PTF on Saturday, rural carriers counting own mail, rural carriers filing won COA cards, discontinued review of individual CFS mail prior to submission, holding Std. A mail until after cup-off, discontinued typing of PG Box key numbers for cross reference, and just recently the baying of your box mail. All these changes have significantly reduced the workload of the Byrdstown office.

As managers, it is our responsibility to maintain an efficient operation and to reduce costs to only what is necessary.



Ron King  
Manager, Post Office Operations



DATE: January 25, 2006

OUR REF: JWB:jb


SUBJECT: Pre-Arbitration Settlement

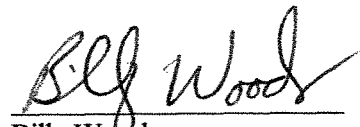
Area # H98C-4H-C01218526  
Local # MW5201  
Grievant Class Action  
City/ST Byrdstown, TN

As a result of pre-arbitration discussions, we have mutually agreed to full settlement of the above referenced case as follows:

- The Postmaster will immediately cease performing bargaining unit work above and beyond that which was performed by the Postmaster prior to the Function 4 Review of March 2001.
- Clerks John Palomeque and Deborah Shearer will each be granted lump sum payments of \$25,000 for assumption of bargaining unit work by the Postmaster since this Function 4 Review.
- The above payments are less normal tax withholdings.

It is further agreed that the above settlement is reached on a non-precedent basis, does not constitute a waiver of either party's position on similar cases, and is not to be cited or referenced by either party in any future case which may arise outside this office.

  
\_\_\_\_\_  
James W. Bledsoe                      Date  
Labor Relations Specialist (Area)                      1/25/2006

 1/25/06  
\_\_\_\_\_  
Billy Woods                      Date  
National Business Agent, APWU

May 8, 2001

MEMORANDUM FOR: Jerry Gregory, Postmaster  
Carthage, TN

SUBJECT: Function 4 BPI

A function 4 (BPI) review was conducted in your office April 18-19, 2001. BPI (Breakthrough Productivity Initiative) is the roadmap to take us from where we are to where we need to be. BPI is a national program for controlling costs and achieving improvements in productivity. BPI calls for significant increases in productivity instead of small incremental change. It is vitally important for Breakthrough Productivity to become a reality in the postal service because of our changing marketplace.

The review at your office was conducted using the national standard expectations for productivity in all the work to be conducted in your office. According to the workload, your office has 98 hours each week if productivity is being achieved in distribution and on the window, as well as allied activities.

My expectation is that actual postmaster work in your office will not exceed 4 hours on any given day, sometimes more and sometimes less, but over a year will not exceed this average. When I subtract your contribution, there is 88 total clerk hours per week, which includes Saturday. On Saturday you are authorized 4 hours of higher level (administrative hours). This equates to a total each week of 88 clerk hours and 44 administrative hours.

Based on the above, my expectation is that your office not exceed 88 clerk hours and 44 Administrative hours each six day week. A holiday week would be reduced by the appropriate daily amount.

As managers, it is our responsibility to maintain an efficient operation and to reduce costs to only what is necessary. There is attached to this memo a copy of the BPI review as well as some suggestions to achieve the desired results.

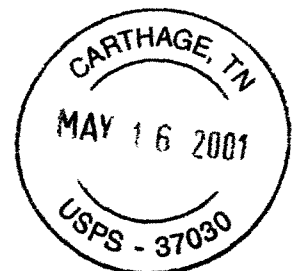
As the volumes we are now experiencing are probably as high as they will be for at least the next five months, it is imperative we schedule so as to balance the workhours to the workload beginning immediately.

If you have concerns notify me immediately.



Ron King  
Manager, Post Office Operations

525 ROYAL PARKWAY  
NASHVILLE, TN 37230-9751  
615-885-9109  
FAX: 615-872-5572



**DATE:** March 16, 2000

**MEMORANDUM FOR:** Jerry Gregory, Postmaster  
Carthage, TN 37030-9998

**SUBJECT:** Function 4 Review

This Memo is a follow-up to our meeting of last week concerning the Function 4 review conducted in your office by Larry Easterwood and James Huddleston on February 29, 2000.

Based on mail counts, the AM workload for distributing all letters, all flats, all parcels, all box mail, breaking down the mail, and working the accountables to the carriers is a total of 4 hours (without any assistance from the postmaster). Dispatch and allied duties the remainder of the day would take approximately 3 hours. The window duties do not exceed 9 hours (including lunch relief) four days per week and 5 hours on Wednesday. Saturday, the clerk hours in addition to the "higher level" clerk should not exceed 5 hours, as the "higher level" clerk will be performing clerk duties 90% of the time, including all window work.

The above "normal" week clerk workload would be 16 hours four days, 12 hours Wed, 5 hours Saturday, and 4 hours Sunday, for a total of 85 hours with no postmaster involvement. This is not the number that Larry and James recommended nor is it what we discussed, but based on what the numbers show, 85 clerk hours per week should be entirely attainable, especially when postmaster involvement is not included. Your solid 3 hours clerk contribution per day should more than offset any workload variation.

Jerry, we are in a situation where if it is possible, we must do it. Again, my expectation is for the Carthage office to operate within 85 clerk hours per week. If you have questions, call me immediately.



Ronald W. King  
Manager, Post Office Operations



DATE: January 23, 2006

OUR REF: JWB:jb

SUBJECT: Pre-Arbitration Settlement

Area # H98C-4H-C01107226

Local # 022001C

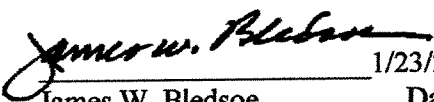
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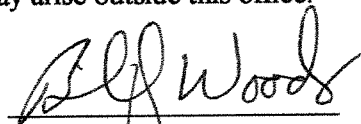
City/ST Carthage, TN

As a result of pre-arbitration discussions, we have mutually agreed to full settlement of the above referenced case as follows:

- The Postmaster will immediately cease performing bargaining unit work above and beyond that which he performed prior to the Function 4 Review of April 2001.
- Clerk Cheryl Daly, now in Cookeville, TN, will be granted a lump sum payment of \$45,000 to cover the period she was deprived of bargaining unit work until she transferred to Cookeville.
- Clerk Ethyl Key will be granted a lump sum payment of \$11,000, and Clerk Miranda Andrews will be granted a lump sum payment of \$7,000 for the period of time between Clerk Daly's transfer to Cookeville and when a new PTF was hired. They were available to perform the bargaining unit work in question during this period of time.
- Clerk Barbara Williams, hired as a PTF in July of 2005 will be granted a lump sum payment of \$4,300.
- All of the above payments are less normal tax withholdings.

It is further agreed that the above settlement is reached on a non-precedent basis, does not constitute a waiver of either party's position on similar cases, and is not to be cited or referenced by either party in any future case which may arise outside this office.

  
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James W. Bledsoe Date 1/23/2006  
Labor Relations Specialist (Area)

  
\_\_\_\_\_  
Billy Woods Date 1/23/06  
National Business Agent, APWU