

The National Parties are responsible for jointly developing all training material used in conjunction with training sessions attended by the Regional Area Teams, District Lead Teams and District Evaluation and Adjustment Teams.

**Area/Regional Teams** - Area/Regional Teams will consist of the NALC National Business Agent (NBA) or his/her designee from each NALC region and the Area Managers Delivery Programs Support or his/her designee from each Postal Service Area. It will be the responsibility of each Area/Regional Team to monitor the process, determine the number of district teams needed, and resolve issues advanced by the District Lead Teams. Any issues that cannot be resolved by the Area/Regional Team will be referred to the National Oversight Team within three working days of receipt of the issue. The Area/Regional Team will regularly communicate with both District Lead Teams and the National Oversight Team. The Area/Regional Teams will provide/oversee training on the Evaluation and Adjustment Process to the District Evaluation and Adjustment Teams. Such training should be provided in-person. However, the parties recognize and agree that there will be situations where in-person training is not efficient and economical.

Anticipated changes to the representatives on the District Lead Team or the District Evaluation and Adjustment Team must first be jointly discussed with the Area/Regional Team.

**District Lead Teams** - There will be one lead team in each district. Each District Lead Team is responsible for the following:

- Overseeing both the process and District Evaluation and Adjustment Teams within its district.
- Selecting zones for evaluation and determining the number of the selected zones that will be adjusted using Carrier Optimal Routing (COR). This information will be used to make recommendations to the Area/Regional Team on the number of District Evaluation and Adjustment Teams and other resources needed to timely complete evaluations and adjustments.
- Decide whether a zone will be reevaluated using the September/October period only upon receipt of a request from the Local Office Contacts and after the District Lead Team (or designee team) reviews the Workhour Workload Report (by Route) and the Weekly Operations Summary Reports.
- When COR is used for adjustments, the District Lead Team will, after coordinating with the district and NBA offices, schedule COR technicians, make sure that valid PS Form 3999s are available, and ensure that necessary travel time validations are completed so as there are no delays in scheduled evaluations or adjustments.
- After selection of zones, determine the number of zones that will be adjusted using COR.
- Determine the number of District Evaluation and Adjustment Teams necessary to complete evaluation and adjustments within the JARAP time frame and provide that information to the Area/Regional Team.
- Prioritizing and scheduling evaluations and adjustments so that all necessary adjustments can be completed in a timely manner.
- Providing evaluation and adjustment schedules to the Area/Regional Teams.
- Resolving issues advanced by a District Evaluation and Adjustment Team and referring within two working days any unresolved issue.

- Assigning District Evaluation and Adjustment Teams to units and communicating with them at least weekly.
- Completing data entries that track the progress of each District Evaluation and Adjustment Team in all the units and compile the results of the evaluation and adjustment process by delivery unit, installation, and district, and forward this information through the Area/Regional to National Oversight Teams.
- Provide or participate in training District Evaluation and Adjustment Teams on the evaluation and adjustment process. Such training should be provided in-person. However, the parties recognize and agree that there will be situations where in-person training is not efficient and economical.
- Ensuring that all base data entered into the Delivery Operations Information System is an accurate reflection of the agreed to adjustment.
- Ensure evaluations and adjustments are completed in a timely manner.
- Any delays in the process resulting from the unavailability of a District Lead Team or District Evaluation and Adjustment Team member will be immediately elevated to the Area/Regional Team.

**District Evaluation and Adjustment Teams** – District Evaluation and Adjustment Teams are responsible for the following:

- Data analysis, route evaluation and adjustment, and oversight of jointly conducted carrier consultations.
- Maintain ongoing communications with local office contacts to obtain information needed to evaluate and adjust the routes.
- Ensuring that local office consultations are completed by the assigned date. Failure by the local office contacts to meet the completion date will result in the immediate referral of this issue to the District Lead Team. District Evaluation and Adjustment Teams may conduct carrier consultations when necessary to ensure that the evaluation and adjustment process is completed in a timely manner.
- Review all available information for anomalies and potential data integrity issues. Should a data integrity issue be identified by the team, all reports related to that issue will be made available to the District Evaluation and Adjustment Team upon request.
- Upon assignment to a delivery unit, the District Evaluation and Adjustment Team should immediately advise their Local Office Contacts that they need current representative PS Forms 3999 for the purpose of moving territory, if necessary, during adjustments. Such PS Form 3999 will be completed as soon as practicable.
- Consider all information provided including actual times, base time, PS Form 3999s, fixed office times, mail volumes and carrier comments to come up with an evaluated time and adjust the routes if needed.
- Should a District Evaluation and Adjustment Team be unable to resolve any issue, the matter must immediately be referred to the District Lead Team.
- Forward to the District Lead Team copies of all data and adjustments.
- Ensure the evaluation and adjustments are completed in a timely manner.
- Assign management and union representatives to present a nationally-developed standup talk to employees in a unit selected for this process.

The route adjustment team will use the following period for the review and complete the evaluations using the methodology outlined in this agreement, unless the route adjustment team mutually agree to use a different period.

Evaluation Period	Analysis Start Date	Implementation Period
September–October 15	October 18	October 18–February 28 *

\*No adjustments will be implemented between November 15 and January 1.

The District Lead Team will decide whether a zone will be reevaluated using the September/October period only upon receipt of a request from the Local Office Contacts and after the District Lead Team (or designee team) reviews the Workhour Workload Report (by Route) and the Weekly Operations Summary Reports.

Evaluation and adjustment of collection and parcel post routes that do not include any casing and delivery of mail are not covered by this agreement. Evaluation and adjustment of these types of routes will be handled pursuant to the relevant provisions of Handbook M-39. However, when a collection or parcel post route includes the casing or delivery of mail, it is covered by this agreement. Additionally, when a collection or parcel post route that does not include casing and delivery of mail is going to be adjusted to include the casing or delivery of mail, the inspection paperwork will be given to the District Evaluation and Adjustment Team to include in their adjustment package under this process.

Evaluation and adjustment of city delivery routes in offices that do not use the Delivery Operations Information System will use the following procedures except that PS Forms 3997 and 3921 will be used in place of the Workhour Workload Reports referenced below.

#### DATA ANALYSIS

##### Data Integrity

Data integrity issues will be addressed prior to any analysis and adjustments. Such issues include, but are not limited to, amended clock rings, work hour transfers, and designation of work hour codes.

It is in the best interests of the parties that data used for this process is accurate and reliable. Local Office Contacts should make the District Evaluation and Adjustment Team aware of any issues they have with the integrity of the data resulting from such things as altered time records, MODS code changes, or work hour transfers. Additionally, the District Evaluation and Adjustment Team should review relevant reports for each delivery unit, including the “Flash Last 4 Weeks Report”, LTATS – Weekly Summary Report, and Weekly Operation Summary Report to determine if there are any data integrity issues. The team will review and address any such issues prior to completing any analysis or adjustment.