

VBA - AFGE Memorandum of Understanding

National ECM and Senior ECM Performance Standards

The following constitutes an agreement between the Department of Veterans Affairs and the American Federation of Government Employees, AFL-CIO, National VA Council #53, regarding implementation of the national performance plan for journey-level Education Case Managers (ECM) GS-10 and journey-level Senior Education Case Managers (ECM) GS-11 in the RPO Education Divisions. A journey-level ECM GS-10 is an employee with 12 months of experience as a GS-10 ECM. A journey-level Senior ECM has at least 12 months experience as an ECM and is a GS-11.

1. Management will monitor and assess the implementation of the national performance plan and make adjustments where necessary. On a monthly basis during the first six months and then quarterly through the end of the first year, a consolidated production report showing aggregate employee performance data, by office, will be provided to the mid term bargaining team. This report will also include the number of ECMs who are placed on a Performance Assistance Plan (PAP) and a Performance Improvement Plan (PIP). Data for each facility will be provided to local presidents including the number of ECMs placed on a Performance Assistance Plan (PAP) and a Performance Improvement Plan (PIP).
2. Local management will advise the local Union of any ECM specialization. Local management will develop procedures to accommodate those situations where a facility specializes in a manner that does not give the ECM the opportunity to meet the national performance plan. Management will share the procedures with the Local Union and meet their labor-management obligation as appropriate.
3. Management at each facility is strongly encouraged to analyze data and consider factors influencing an individual ECM's ability to meet performance standards prior to placing him or her on a Pre-Improvement Assistance Plan (PAP) or on a Performance Improvement Plan (PIP) as outlined in Article 26.
4. Within 60 days of implementing the ECM national performance plans, Local Management will conduct a meeting(s) with the Education Case Managers (ECMs) to discuss the national performance standards. The purpose of the discussion(s) is to ensure that there is a clear and common understanding of the performance plan. The Local Union will be given reasonable advance notice of the meeting(s).
5. Post-approval for deductible time may be appropriate in those circumstances when pre-approval cannot be obtained, e.g. fire drills, non-functional computer systems and applications, and other activities beyond the control of the employees.
6. If an error challenge procedure exists, it will be continued. If not, then management will develop an error challenge procedure.
7. Employees will be notified in writing within 3 working days after the date the quality review is completed of the number and type of errors charged under the quality review element.

Management will provide the employee with appropriate notice of errors, including corrective action required, updates on any procedures and/or training/re-training as necessary in the areas where weakness was noted. Errors of the same type that pre-date the appropriate notice will not be charged on subsequent reviews.

8. Should it be necessary to use an expanded sampling of work, management will first advise the employee and attempt to resolve any issues. Employees will be notified in writing within 3 working days after the date the expanded sample quality review is completed of the number and type of errors charged under the quality review element. Management will provide the employee with appropriate notice of errors, including corrective action required, updates on any procedures and/or training/re-training as necessary in the areas where weakness was noted. Errors of the same type that pre-date the appropriate notice will not be charged on subsequent reviews
9. For the Journey-Level ECM, prior to deeming a referral as having been unnecessary, the referral will be discussed with the employee as part of the examination of evidence. If a training deficiency is identified, or written instructions from Management regarding referrals were incomplete or unclear, or, if documentation of an unnecessary referral is incomplete, the referral will not be deemed as “unnecessary.” *Supervisors will determine valid unnecessary referrals.*
10. For the Senior-level ECM, contacting customers within 2 business days on average (less any unavailable work hours for which deductible time was granted) shall be required only to the extent that such contact is within the control of the employee. The date of receipt of a referral does not constitute one of the business days.
11. Stations wanting to establish local standards that exceed the minimum national performance floors will use objective criteria and data consistent with Article 26, Section 2 and 3 of the Master Agreement.
12. Normally, an employee’s performance will be rated one time per rating period as established in law, government wide regulations and departmental policy and will be considered as successful if they meet the standards established by management for the rating period.
13. The parties may negotiate locally on this subject provided it does not conflict, interfere with, or impair the implementation of this MOU and the Master Agreement. If so, bargaining obligations will be completed prior to local implementation.
14. Management will provide a copy of this agreement to the Local President upon receipt..

/S/ Crystal Wiggins
For Management

/S/ Alberta Franklin
For the Union

Date: April 1, 2004