



NTEU Chapter 52

SERVING SOUTH TEXAS EMPLOYEES

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November 9, 2001

To: All Stewards

From: Tom Jones, Chapter President

Re: Annual Appraisal Ratings

There has been a lot of discussion in this office if an employee has to have "Exceeds" in all aspects of the critical job element to receive a "5" in the element. We have been trying to reconcile the NORD V, Article 12, Performance Appraisal System, Section 5, and an Agency memorandum dated June 11, 1999, regarding Revised Standard Position Descriptions and Critical Job Elements for Revenue Officer. We sought the advice of our Field Representative Attorney Katie Huth on this issue.

After talking with Katie, it is the Chapter's position that there is no conflict between the contract and the memorandum mentioned above. In order for an employee to receive a "5, Outstanding", in a critical element, they must receive "Exceeds" in every aspect of that element. For example, a element with four aspects, an employee receiving three "Exceeds" and one "Meets" does not qualify them for a "5" in that standard, but a "4". The portion of the memorandum in question states, "It is not necessary for an employee to exceed in every performance aspect listed under the critical job element to earn an "exceeds" rating for the particular element." It appears the confusion comes with the term "exceeds" used in the memorandum, which should actually be stated as "exceeds fully successful". Per the contract, exceeds fully successful is a "4" rating. "Exceeds" in an aspect is the highest obtainable rating for an aspect, but an "Exceeds" [Fully successful] is not the highest rating in an element, but is a "4" rating. In regards to the "Overall Rating", the employee may be rated as "Outstanding" if the employee receives an outstanding in more than half of the critical elements and Exceeds Fully Successful in the other critical elements, further confuses this.

I hope this clarifies the issue, but if you wish to have further discussion please contact me. Thank you for all your hard work you have done for the members and the Chapter.

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