

- 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.

When available, COR will be jointly used by the District Evaluation and Adjustment Team as a tool for route optimization and adjustment.

Carrier Optimal Routing [COR]

The use of COR by the District Lead Team or District Evaluation and Adjustment Team must be consistent with the applicable provisions of the M-39 Handbook, and their application of the COR process must also comply with the parties national settlement which is reproduced below.

COR is considered available in any zone where the COR data preparation is completed before the adjustment and where a COR technician is available.

When transferring territory, the back of the PS Form 1840 will indicate by sector segment, any change in street credit from the actual street time used for that sector segment on PS Form 3999, including all relay, travel, allied time, etc. Any such proposed adjustment to the carrier's street time must be documented and explained by appropriate comments on the reverse of PS Form 1840.

For example, territory transferred from Route C002 to Route C004 would be noted, by sector/segment, in the "Relief" Column on the PS Form 1840 Reverse for Route C002. The same territory would be noted, by sector/segment, in the "Addition" Column on the PS Form 1840 Reverse for Route C004. Allied times associated with that territory will also be reviewed to determine if they should be transferred to the gaining route C004, or left on the losing Route C002.

Old relay times from the existing 3999 (recorded as EXR) and new relay times (recorded as ADJ) for the proposed adjustment on each route are identified on the reverse of PS Form 1840 by relay as well as total relay time for the route. The difference between these two total times is noted in the relief or addition column of the PS Form 1840 Reverse. The District Evaluation and Adjustment Team will be provided the relevant reports generated by COR to review the specifics of the proposed changes regarding relays and relay times so that they can jointly make decisions regarding the proposed changes, and then have the necessary documentation for the adjustment consultations regarding any agreed to changes.

The Allied Time Report will be used as a tool to review proposals regarding the transfer of allied time. After the District Evaluation and Adjustment Team jointly decides what is transferred. The report will be used to document any agreed to changes during the adjustment consultations on the PS Form 1840, Reverse.

Travel To, Travel From, and Travel Within times must be validated, documented, and discussed during the carrier consultation. If there is a different credit of time proposed for travel within or travel to and from the route other than what existed as reflected by PS Form 3999, such new time will be validated and a decision made by the District Evaluation and Adjustment Team regarding the proposed change, prior to the second consultation with the letter carrier. It is not necessary that the validation itself be done jointly in order to satisfy the District Evaluation and Adjustment Team.

For example, all Travel To, Travel From, and the total of all Travel Within times from the 3999 (recorded as EXR) are identified on the reverse of the PS Form 1840 and new travel times are identified as an adjustment (recorded as ADJ) on the reverse of PS Form 1840. The difference between these two times will be noted in the relief or addition column on the reverse of PS Form 1840. The District Evaluation and Adjustment Team will be provided all relevant reports generated by COR to review the specifics of the proposed changes regarding travel times so they can jointly make decisions regarding the proposed changes, and then have the necessary documentation for the adjustment consultations regarding any agreed to changes. Any change in travel times from the 3999 due to a proposed new travel pattern must be validated, and then reviewed by the District Evaluation and Adjustment Team so they can jointly make decisions regarding the proposed change. The Route Summary Report will be used as a tool to aid in the validation process.

1. The evaluated office and street times selected by the District Evaluation and Adjustment Teams will be transferred to the top left hand corner of the PS Form 1840 Reverse. The initial proposed adjusted office and street times from the COR process will appear on the top right corner of the PS Form 1840 Reverse. The difference between these two times must be identified on the 1840 Reverse by sector segment (when applicable) for each route. The difference in these times that must be specifically identified includes items such as proposed changes in relay times, travel times, allied times, delivery times, miscellaneous times, and eliminated/added routes (eliminated/added routes can impact the total time difference due to demonstrated performance, selected street time, and fixed time such as travel to, travel from, loading time, street breaks, etc).
2. The District Evaluation and Adjustment Team will be working with a COR Technician who knows the system. The COR Technician is there to make the necessary inputs and to explain any aspect of the COR program/process that the team needs to make decisions regarding the proposed adjustments. The COR Technician will conduct such duties at the joint direction of the District Evaluation and Adjustment Team.
3. All decisions regarding the evaluations and adjustments of routes, including deductions and/or changes proposed by COR, or manually, are made jointly by the District Evaluation and Adjustment Team. Any items of disagreement will be identified and documented by the District Evaluation and Adjustment Team and immediately referred to the District Lead Team.
4. When transferring territory in COR and non COR sites, the District Lead Team or District Evaluation and Adjustment Team may agree to change the time credit for a sector segment. Such changes will be noted on the reverse of the PS Form 1840 with the team's explanation of the time that was added to or deducted from and the reason.
5. If a PS Form 3999 was changed after being downloaded into the Delivery Operations Information System, for either a COR or non COR site, the parties will jointly review the Delivery Operations Information System 3999 Audit Trail Report.