



NTEU Chapter 49

COLLEEN KELLEY TO RETIRE!

SEE PAGE 2

CHAPTER PRESIDENT'S CORNER

By

Duncan Giles

President NTEU Chapter 49



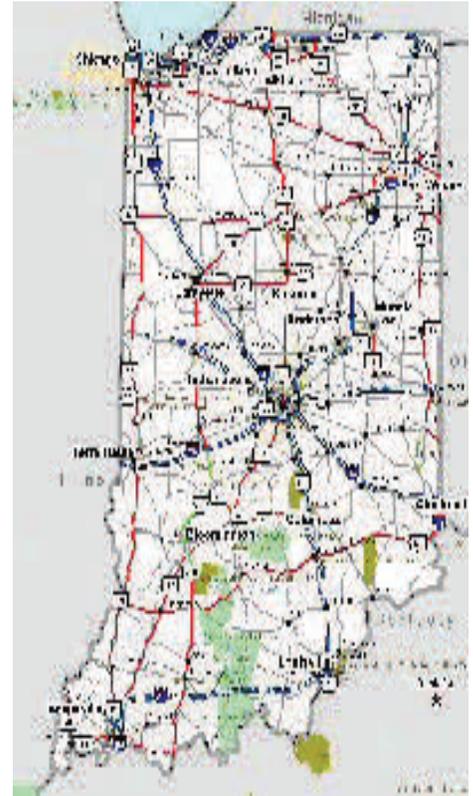
On this and that....

I don't know about any of the rest of you, but after these last several weeks, I'm hoping for better weather. I'm done with the snow, ice & record cold.

Speaking of cold, today's column will be talking about my experiences in negotiating the new National Agreement. Our chapter will be meeting to hold a ratification vote on March 11th.

To say that this was the most uncomfortable & illogical negotiation I have ever participated in is actually understating it. I was appraised of the negotiations the entire way but was actually brought to the table for the final two pieces.

The first is what's called the Mediation/Arbitration session. That was held in February of 2014. It was a last ditch effort to resolve all the unresolved issues from the previous months of bargaining. The first week is to meet with an Arbitrator who (continued Page 3)



PRESIDENT

DUNCAN GILES

VICE PRESIDENT

SUSAN WRIGHT

TREASURER

SCOTT CARDER

SECRETARY

GAIL GROVES



Chapter 49 President Duncan Giles (left) receives an award from Colleen Kelley (right) at the 2013 convention



Chapter 49's Legislative Coordinator Larry Lannan (Right) with Indiana 5th District Congresswoman Susan Brooks (Left) in her Washington office

NTEU NATIONAL PRESIDENT COLLEEN KELLEY ANNOUNCES HER RETIREMENT

While putting the finishing touches on this newsletter, we learned that NTEU National President Colleen Kelley does not plan to seek re-election to another term.

Colleen began her career as an IRS Revenue Agent in 1974, later joining the NTEU National Office staff, and was elected as National Executive Vice President of the union in 1995. Four years later, when long-time NTEU National President Bob Tobias decided to step down, Colleen was elected to the top spot.

"Colleen always looked out for the members of NTEU", said Chapter 49 President Duncan Giles. "She effectively defended NTEU members when federal employees and their agency budgets came under attack in Washington."

Colleen's final term as president will end at the NTEU National Convention, scheduled for Aug 10-13 in Hollywood, Florida. A new NTEU National President will be elected at that event.

In her message to Chapter Presidents announcing her intention to retire, Colleen expressed a desire to spend some uninterrupted healthy years with her family. She was clearly struggling with some health issues during this year's Legislative Conference held in early February. She often found it difficult and painful to stand for long periods of time.

We at Chapter 49 applaud the work done by Colleen Kelley during her long career with IRS and NTEU. She has accomplished much for those of us doing the work on the ground floor. She always paid attention to any concerns we passed along to her.

Colleen Kelley will be missed. But NTEU is a strong union and a new national president will take over and continue our important work.

REPORT ON 2015 NTEU LEGISLATIVE CONFERENCE

By

Larry Lannan

NTEU Chapter 49 Legislative Coordinator

Every year, NTEU leaders and members involved in their local chapter's legislative program gather in Washington DC to speak with their local elected officials and their staff members. Several hundred NTEU people from around the nation attended this year's conference.

The national NTEU Legislative Staff arranged for my visits to the offices of Indiana elected officials in Washington. I met with 7 of our 9 House member offices and both Senators' offices. This is a Chapter 49 record for number of visits.

We set another record in this visit. I had the chance to meet personally with 4 Indiana House members, including lengthy discussions with 2 of those 4. More details on that in a moment.

NTEU had several issues, including pay and retirement for federal employees. But one issue I raised first at every office I visited in Washington was the lack of funding for IRS. I may be retired, but I stay in touch with many of you still working in the trenches. I talked to members of congress and their staff members about the woeful understaffing in toll-free telephone help. I detailed the reduction in services implemented in our Taxpayer Assistance Centers (Walk-In offices).

(continued Pg. 4)

CHAPTER PRESIDENT'S CORNER

(Continued from Page 1)

(for that week) acts as a mediator to try & bring the parties together. We worked very hard during that week but could not bridge any gaps. We then prepared over the weekend to get ready and argue our positions in front of this same gentleman that now had the position of Arbitrator. The IRS, in its wisdom (and its contractual right), decided that for several issues we needed a 3 Arbitrator panel to decide these Articles.

I'd like to back up a second to explain how the negotiations usually work between the IRS & NTEU (or really any 2 parties). You start out with 2 different positions & eventually agree on something in the middle that one or both of the parties might not be happy with but can live with. This didn't happen in this case.

I don't know where the orders came from, but management was very clear. The agency consistently implied this position - IRS employees have way too many rights & management needs to eviscerate the contract. It was very rare for them to come off their positions at all.

Think of it like going in to buy a car. The car lists for \$30,000. After research you know that \$26,000 is what they are selling for. You start out at around \$22,000 and try to get it for somewhere under or around the \$26,000 figure. What would you do if the dealership not only wouldn't budge from the \$30,000 price tag as you went to say \$24,000, they went to \$31,000? This was the environment NTEU was dealing with.

So we presented our positions to the solo & then the 3 Arbitrators & awaited their written findings. While they ruled on the vast majority of issues in favor of NTEU's positions, the neutral parties didn't include clear cut contract language, so management proceeded in the summer of 2014 to come back to many of their same positions. IRS finally threw up their hands & said they couldn't work with us anymore (which I found to be a HUGE irony) & requested that the Federal Services Impasse Panel (FSIP) take over. The FSIP did assume jurisdiction after talking to both parties.

I was then called back in January of this year to be on the team representing NTEU in front of the Panel. The stakes were very high. If NTEU & IRS management couldn't come to an agreement with the help of the FSIP, then the FSIP would write the contract language in the new agreement & that meant both sides could be VERY unhappy. Facing this, the IRS team finally started to bend. I'm not sure whether it was from FSIP prodding, the more pragmatic members of their team finally able to make decisions or common sense breaking out, but by the late hours of the last day we finally came to the Agreement.

I can tell you this - what we ended up with is very similar to what we have now. Management got a few gains as did employees so it was about a break even endeavor. Did we want more of our language in the agreement than ended up in the final version? Absolutely! But I'm comforted by the knowledge that management was not able to take back rights & allow everything back to their discretion. There is one exception with Quality Step Increases (QSIs). NTEU was forced by statute to give management discretion on awarding QSIs, as was explained in the summary I shared in an e-mail to most of you.

From where we started to where we ended up was a very long & expensive journey to not move very much. In our eyes, it was worth it to hold onto those rights for employees & that is why I'm recommending ratification of this agreement.

That's it for now.

2015 LEGISLATIVE CONFERENCE

(continued from Pg 3)

I explained our out-of-control inventories for collection and examination personnel. I let them all know about the impossible inventory levels of Taxpayer Advocate employees. Bottom line, I told them all what you are handling as a result of the severe budget cuts IRS has in 2015, and funding cuts we've endured the last 4 years, with a devastating cumulative impact.

Here's the interesting part. Most congressional staffers are very aware of our budget issues, particularly in IRS service cutbacks. They are hearing from their constituents. There is a better understanding on Capitol Hill of how drastic IRS budget cuts impact American society in many different ways. President Obama's proposed 2016 spending plan provides a substantial increase in IRS funding. It is way too early to tell what congress will do with that proposal. But I am hopeful IRS may finally be on the way to coming out of the budget hole soon.

My first visit was at the office of 5th District Congresswoman Susan Brooks. Her district extends from the far north side of Marion County all the way north to Marion. Representative Brooks was a lawyer working in the US Attorney's office, which means she was a federal employee during that time. Brooks expressed to me how much she appreciated IRS employees she dealt with during her years as a federal prosecutor. She and her staff made it clear to me she is in no way anti-federal employee. My visit to Congresswoman Brooks office was a friendly, positive visit.

The next stop was 2nd District Congresswoman Jackie Walorski. Her district extends from the South Bend - Elkhart area south just short of Marion and Kokomo. Ms. Walorski was scheduled to meet with me herself, but a last minute scheduling change resulted in me holding a session with a staff member. We had a good and friendly discussion.

I then headed to the office of 6th District Congressman Luke Messer. His district covers Muncie, Richmond, Columbus and extends all the way south to the Ohio River. As I was talking with one of his staff members, Congressman Messer walked in and we talked briefly. His first question was about our issues and I gave him a brief summary. He was very interested in hearing our

issues. He and his staff member were very friendly and engaging during our discussion.

It was time to move on to the office of 8th District Congressman Larry Bucshon. His Indiana district extends from north of Terre Haute down to Evansville. I met with Congressman Bucshon himself for about 20 minutes. He made it clear to me he is not anti-federal-employee and not anti-union. He talked about the many years his father worked is a mine worker and was a member of the United Mine Workers. We had a frank discussion about all major issues. He believes the IRS budget is tied-up in some investigations congress is conducting. My talk with Representative Bucshon was honest, friendly and productive. It was a very good visit.

Next on the agenda was a visit to 7th District Congressman Andre Carson. His district encompasses most of Marion County. Representative Carson has an excellent voting record, siding with federal employees when he votes on the floor. We had a very friendly and productive discussion with his staff. It was a good session.

The next day I visited the office of 9th District Congressman Todd Young. His district extends from Greenwood at the north end down to the Ohio River to the south. Halfway through my meeting with his staff member, Congressman Young joined the meeting. We had an honest and forthright session with Representative Young. He seemed to appreciate the fact that NTEU Chapter 49 had sent me the Washington to visit his office. I expressed my appreciation to Congressman Young for carving out time to meet with me.

I then moved to the other side of the Capitol Building, the Senate office buildings. I had an excellent discussion with an aide to Senator Joe Donnelly. I thanked the staff member for the senator's help when a measure to allow private debt collection firms to handle federal tax collections was sneaked into an unrelated bill. Senator Donnelly was one of many senators that put that move to a quick halt last year. Senator Donnelly has a very good voting record on federal employee issues and I thanked his aide for the senator's consistent support. We had an excellent meeting.

I then moved on to the office of Senator Dan Coats. His staff member was extremely pleasant and friendly. We had a very good discussion of our issues and she listened to all our concerns. The meeting with the senator's staff went very well.

(continued Pg. 5)



ROXIE LOMAX IS FOLLOWING HER INTERESTS ON THE LEGISLATIVE COMMITTEE

Roxie Lomax makes her living as a Bankruptcy Specialist for IRS, but she is following her interests in joining the Chapter 49 Legislative Committee.

"I have always been interested in the legislative process, and as a member of the committee, I get a chance to educate our members about the legislation that impacts us as federal employees," Roxie said. "As a member of the Legislative Committee, I also get to interact with our local senators and congressional representatives regarding issues of importance to our members."

If you are interested in joining the Chapter 49 Legislative Committee, contact Chapter President Duncan Giles at 317-685-7635.

LEGISLATIVE CONFERENCE

(continued from Pg. 4)

My final meeting on Capitol Hill was with the staff of 3rd District Congressman Marlin Stutzman. His district covers the northeast part of the state, with Fort Wayne located in the middle. His staff member was very polite and listened to our concerns. Again, this was a very good atmosphere.

The NTEU Legislative Conference has a luncheon, and this year 2 very key speakers were featured. The House Government Reform and Oversight Committee handles nearly every issue important to federal workers, including pay, retirement and other benefits.

The ranking member on the panel is Congressman Elijah Cummings of Maryland. Cummings was one of our luncheon speakers. He has been a very good friend to federal workers for a very long time. He gave a supportive speech that had the NTEU crowd on its feet cheering throughout his stem-winding oratory.

The other speaker was the Chairman of the Government Oversight Committee, Jason Chaffetz from Utah. It was an important signal that Chaffetz accepted the invitation from NTEU National President Colleen Kelley to speak at our luncheon, since many recent chairmen of this committee have not always been supportive of federal employees. Chaffetz said 2 very important things during his speech. First, he said federal employees should get a pay raise (he didn't say how much, but simply saying we should receive a pay raise is a positive development). Secondly, Chaffetz said those wanting to abolish the IRS are involved in "crazy talk." There are always some members of congress wanting to abolish the IRS. It was important that Chaffetz clearly signaled he was not on board with the "crazy talk" and that's a positive development.

Chaffetz said one more thing of note during his luncheon speech. He turned to National NTEU President Colleen Kelley and said, "...this woman is welcome to talk with me anytime."

(Continued Pg 6)

LEGISLATIVE CONFERENCE

(continued from Pg. 5)

To sum this all up, I have detected a change in the attitude toward the federal work force. In past years, a man in Jason Chaffetz' position would not have accepted a speaking invitation from NTEU. Every member I talked with on the Hill, and their staff members, were engaged and interested in our issues. In the past, some staff members just listened politely, said little, then thanked us for coming. This time, the people in those Washington offices were engaged and their attitude was different than what I have experienced in past years.

Here's one thing every member and their staff agreed upon in every meeting I had. They are all very interested in what you think. They want to hear from you. They are encouraging every one of you to engage with them and provide your views. Believe me, Senators and House members keep track of phone calls and track their mail and e-mail coming into their offices.

If you have any interest in this subject, and you are willing to spend some of your outside of work time on this, NTEU is always looking for people to serve on our Legislative Committee. If you are interested, contact Chapter 49 President Duncan Giles at 317-685-7635.

ANTHEM SECURITY BREACH

NTEU has been following developments in the Anthem security breach. Since Blue Cross/Blue Shield is an Anthem plan and is the most popular health plan for federal employees, this potentially affects a large number of you.

Chapter 49 has learned that Anthem is now providing the promised identify theft protection and credit monitoring services to affected Federal Employees Health Benefit Program (FEHBP) enrollees through its provider, AllClear ID.

While Anthem will be informing impacted individuals through a mailed letter, you can also directly contact Anthem, and its vendor, AllClear ID, through the web at:

<https://anthem.allclearid.com>

or toll-free at 877-263-7995. Please note that Anthem will not be contacting affected individuals via email or by phone, and that scam artists using these communication techniques have been reported.

For the latest updates on this situation from Anthem, use this Web address:

<https://www.anthemfacts.com>

For information about ID Theft from the Federal Trade Commission, [use this link](#)

IRS BUDGET & ID THEFT

Our NTEU National President Colleen Kelley has been very clear on this issue - due to chronic staffing shortages, the IRS is struggling to catch criminals who file fake returns using other people's identities and collect refunds owed to legitimate taxpayers.

According to a recent report by the Government Accountability Office (GAO), the IRS prevented \$24 billion worth of refunds from being handed out to ID theft criminals in 2013. Still, the agency paid out \$6 billion in refunds to 1 million fraudulently-filed returns that year.

"As criminals become more sophisticated and tech-savvy, Congress must help the IRS stay ahead of the lawbreakers and identity thieves," Kelley said. "Now is not the time to cut funding for an agency that collects 93 percent of the federal government's revenue. Congress must increase the 2016 budget for IRS, which is struggling to fulfill its mission after suffering five straight years of budget cuts."

The IRS says it blocked 19 million suspicious returns and avoided paying out \$63 billion in refunds to returns filed by ID theft criminals from 2011 through October 2014. But each ID theft case can take up to 120 days to resolve given the complexities involved, according to the IRS.

Calling identity theft cases "among the most complex," the IRS has stated that "fighting identity theft is an ongoing battle as identity thieves continue to create new ways of stealing personal information and using it for their gain."

In her January report, IRS Taxpayer Advocate Nina Olson said because of a "huge spike" in identity theft, the IRS—which is predicting a loss of 16,000 to 17,000 employees over the last five years—was forced to divert 3,000 employees in 2014 to work on identity theft cases.



SHARON ALMANZA RETIRES

Sharon Almanza served as a Chapter 49 steward at the Indianapolis IRS Call Center for many years. After 12 years of service as a seasonal telephone CSR, Sharon decided to retire as filing season began to ramp up this tax season.

Chapter 49 wishes to thank Sharon for her service to the IRS and NTEU. We wish her well as she enters the world of retirement.

IF YOU NEED HELP

If you need help, or just have a question about your work place or NTEU, feel free to contact one of our officers or stewards. It is usually best to contact a steward in your office. The officers are listed on the first page of this newsletter. A listing of all officers and stewards is provided on our Web site, www.nteu49.org

Our Chief Steward is Pam Clayton. You can contact her by phone at 317-685-7814. You can always contact the Chapter 49 Union Office in Indianapolis at 317-685-7635. If no one is in the office, leave a message and someone will get back to you as soon as possible.

STAY IN TOUCH WITH CHAPTER 49

WEB: WWW.NTEU49.ORG

TWITTER: @NTEU49

FACEBOOK: NTEU CHAPTER 49 INDIANA