

NATIONAL SUPPLEMENT
Between
U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT
And
AMERICAN FEDERAL OF GOVERNMENT EMPLOYEES
NATIONAL COUNCIL OF HUD LOCALS 222

SUBJECT: Customer Relationship Management (CRM) System Implementation

SCOPE: The scope of this supplement encompasses the impact and implementation of the Customer Relationship Management (CRM) System Implementation for the Office of Field, Policy and Management (FPM) bargaining unit employees.

- 1) The implementation of Customer Relationship Management (CRM) will include basic and advanced system training and ongoing support.
- 2) Affected employees' performance elements and standards will not change for the FY18 and FY19 performance cycles. The FY18 and FY19 performance cycles will be used to train, educate, and acclimate affected employees to the CRM system.
- 3) This Supplement shall not diminish or waive any rights that bargaining unit employees have under the AFGE Agreement, law, rule or regulation. The Customer Relationship Management System shall work in conjunction with and be administered in accordance with the Agreement. The Parties agree that CRM shall not be executed in any manner conflicting with the provisions of the Agreement including but not limited to Supplement 9 "HUD Standard Operating Protocols" of the Agreement.
- 4) No bargaining unit employee will be involuntarily separated or downgraded as result of the implementation of the Customer Relationship Management (CRM) system.
- 5) The primary use of the Customer Relationship Management system is to improve the delivery of HUD customer service to citizens, constituents, and stakeholders. Subsequently, data collected (e.g. metrics, direct feedback, etc.) at both itemized and aggregate levels will be used for continuous CRM process improvements. It is not management's intent to utilize customer service feedback to discipline an individual employee without substantiation.
- 6) Management will ensure the CRM system complies with applicable federal law, department standards and terms of the collective bargaining agreement pursuant to The

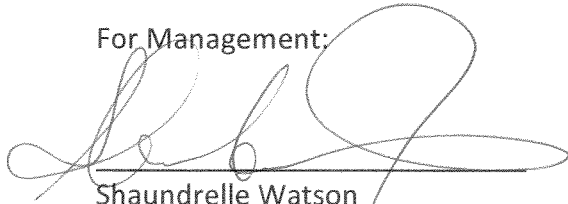
Rehabilitation Act of 1973, The Americans with Disabilities Act of 1990 (ADA, and 2008 as amended).

- 7) The primary use of the Customer Relationship Management system is to improve the delivery of HUD customer service to citizens, constituents, and stakeholders. Data collected (e.g. metrics, direct feedback, etc.) at either itemized and/or aggregate levels will be used for continuous process improvements. No data or feedback collected on an individual's performance will be used prior to the FY20 performance appraisal cycle.
- 8) There will be no change to any affected employees telework agreement, alternative work schedule, flexi-tour, scheduled annual or sick leave, or Reasonable Accommodation arrangement as a result of the implementation of the Customer Relationship Management (CRM) system. Although no changes to these items are anticipated because of CRM, should they prove necessary they will be handled under the appropriate existing policy and Agreement between HUD and AFGE.
- 9) Any negative information or feedback received from the CRM that affects any program area employees' performance evaluation must be substantiated.
- 10) To the maximum extent possible, work as a result of implementation of the CRM will be distributed equitably among affected bargaining unit employees. Workload, new and existing, created by the implementation of the CRM shall be commensurate with grade and position description. The phrase, "other duties as assigned", as used in position descriptions means duties basic to the job. This phrase will not be used to assign work not reasonably related to an employee's basic position description.
- 11) In applying performance elements and standards as a result of final implementation of the CRM system after all training has been completed, affected BUE performance appraisals shall take into account all of the job functions employees are expected to perform and the actual amount of time available (or not available) to perform these functions.
- 12) Management agrees that CRM training will not commence prior to the conclusion of bargaining. All other trainings previously approved shall not be rescinded as a result of the CRM system implementation. Management will provide its proposed training plan along with the standard operating procedures for the CRM to the Council no later than 30 days upon completion of negotiations. Management agrees to adhere to all components of Article 49 at the local level. Before expecting employees to complete assignments in the CRM to a Fully Successful performance level, Management will ensure and provide adequate training in accordance with the terms of the Agreement.

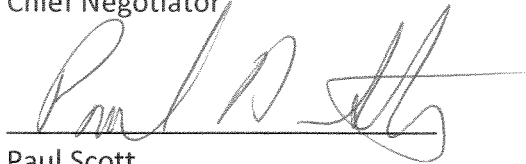
13) The Regional Customer Experience Officer will not be utilized to rate affected employees in their performance appraisals.

November 9, 2017

For Management:



Shaundrelle Watson
Chief Negotiator

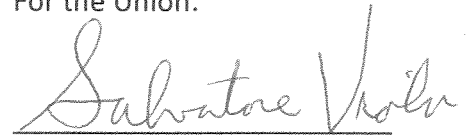


Paul Scott
Team Member

Richard Ott
Team Member

Carol Payne
Team Member

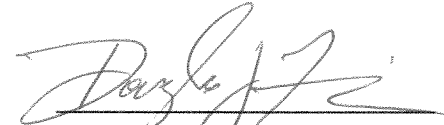
For the Union:



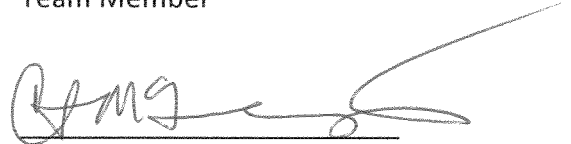
Salvatore Viola
Chief Negotiator



Tracy Vargas
Team Member



Douglas Finer
Team Member



Christopher Mclennon
Team Member

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11/9/17

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