Technology Integrated Alternate Route Evaluation and Adjustment Process 2022–2023

TIAREAP (M-01982)

TIAREAP

- City Delivery and Workplace Improvement Task Force

  - Alternate Route Evaluation and Adjustment Process Task Force

    - March 2021 - Joint subcommittee created for route evaluation and adjustment

      - Christopher Jackson – Director of City Delivery
      - Tim McKay – Special Executive Assistant to the President
      - Michelle McQuality – Assistant to the President for City Delivery
      - USPS members representing delivery operations, labor, and technology

TIAREAP

- Subcommittee tasked with:

  - Developing and implementing a process to efficiently and accurately evaluate city delivery routes

  - Exploring the use of technology, data, and advanced analytics

  - Improving operations, route evaluation, adjustment and optimization, delivery capabilities and visibility

TIAREAP

- Created four HQ joint route evaluation and adjustment teams
  - Ron Osborne – Vice President, Branch 14, Louisville, KY
  - Roger Martin – Secretary, Branch 182, Dayton, OH
  - Homer Christian – Vice President, Branch 359, Huntington, WV
  - Debra Lundergan – Trustee, Branch 1100, Garden Grove, CA

- Worked with USPS delivery operations, programmers and engineers
  - 14 months of discussion and negotiation
  - Developed, modified and improved the technology
  - Conducted joint pilot tests
  - Created instructional materials

TIAREAP MOUs

- Three MOUs signed May 10, 2022

  - M-01982 Memorandum of Understanding (MOU) Re: Technology Integrated Alternate Route Evaluation and Adjustment Process 2022 – 2023 (TIAREAP)

  - M-01983 TIAREAP Guidelines

  - M-01984 Memorandum of Understanding Re: Alternative Evaluation and Adjustment Processes

TIAREAP Principles

- Recognize the importance of maintaining routes in proper adjustment

- Evaluate and adjust city routes using all available information and technology

- Create a process that reduces disputes and is more efficient and less intrusive

- Incorporate Digital Street Review (DSR) technology for street evaluation

Digital Street Review

(DSR)

What is DSR?

- Digital Street Review (DSR) is a tool used within the TIAREAP process to assist teams in analyzing route street data
  - Utilizes Mobile Delivery Device (MDD) one-second breadcrumb and scan event data
  - Maps carrier activities along the route

- Generates a daily report, similar to PS Form 3999, automating the route street evaluation process
  - Used for creation of PS Form 3999-DSR
  - No need for a traditional PS Form 3999 with an inspector
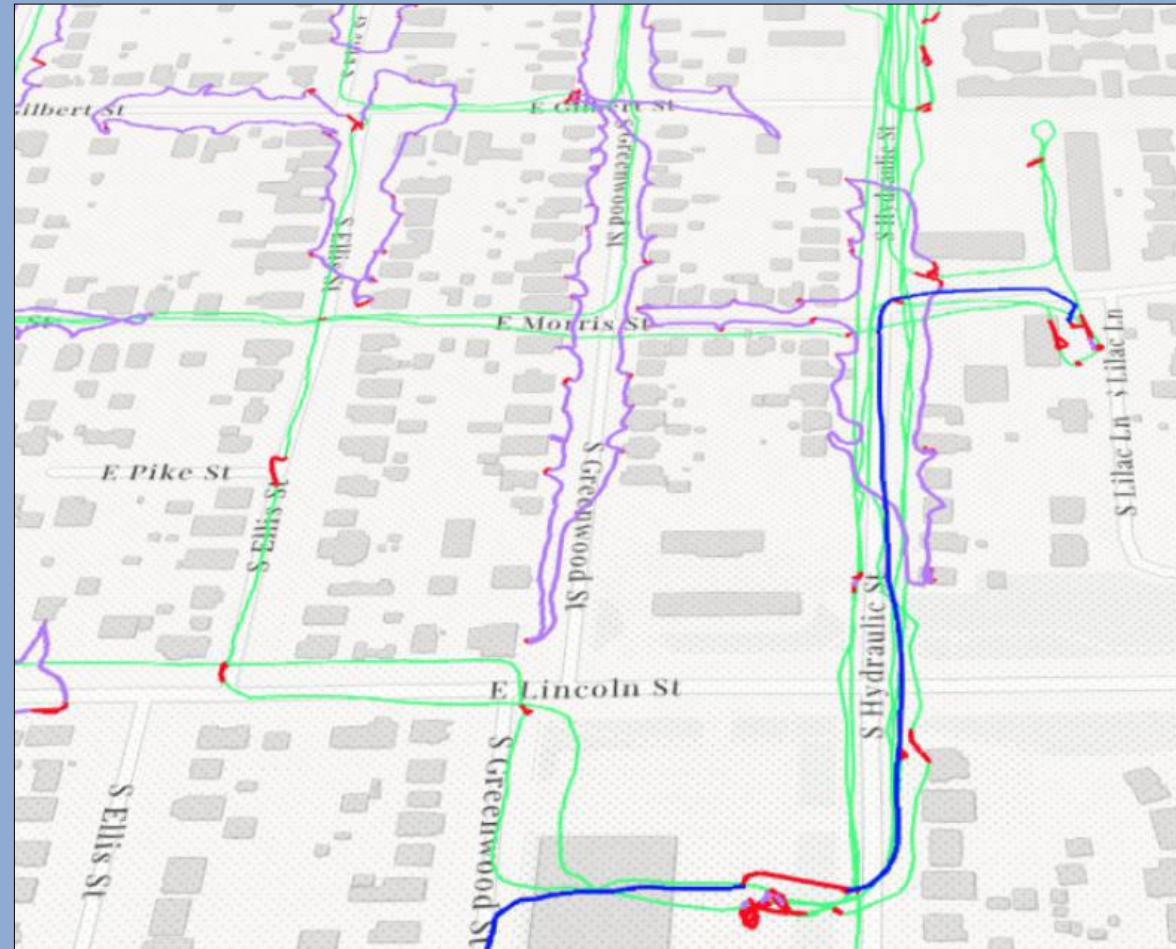
Digital Street Review (DSR)

- Virtually Identifies Assumed Carrier Activities By Utilizing Multiple Data Inputs To Generate A Daily Route Assessment

- Inputs Utilized:
  - MDD-TR collected data
  - Characterized one-second breadcrumbs
  - Major points of interest within a route
  - TACS clock rings
  - Facility geofence data
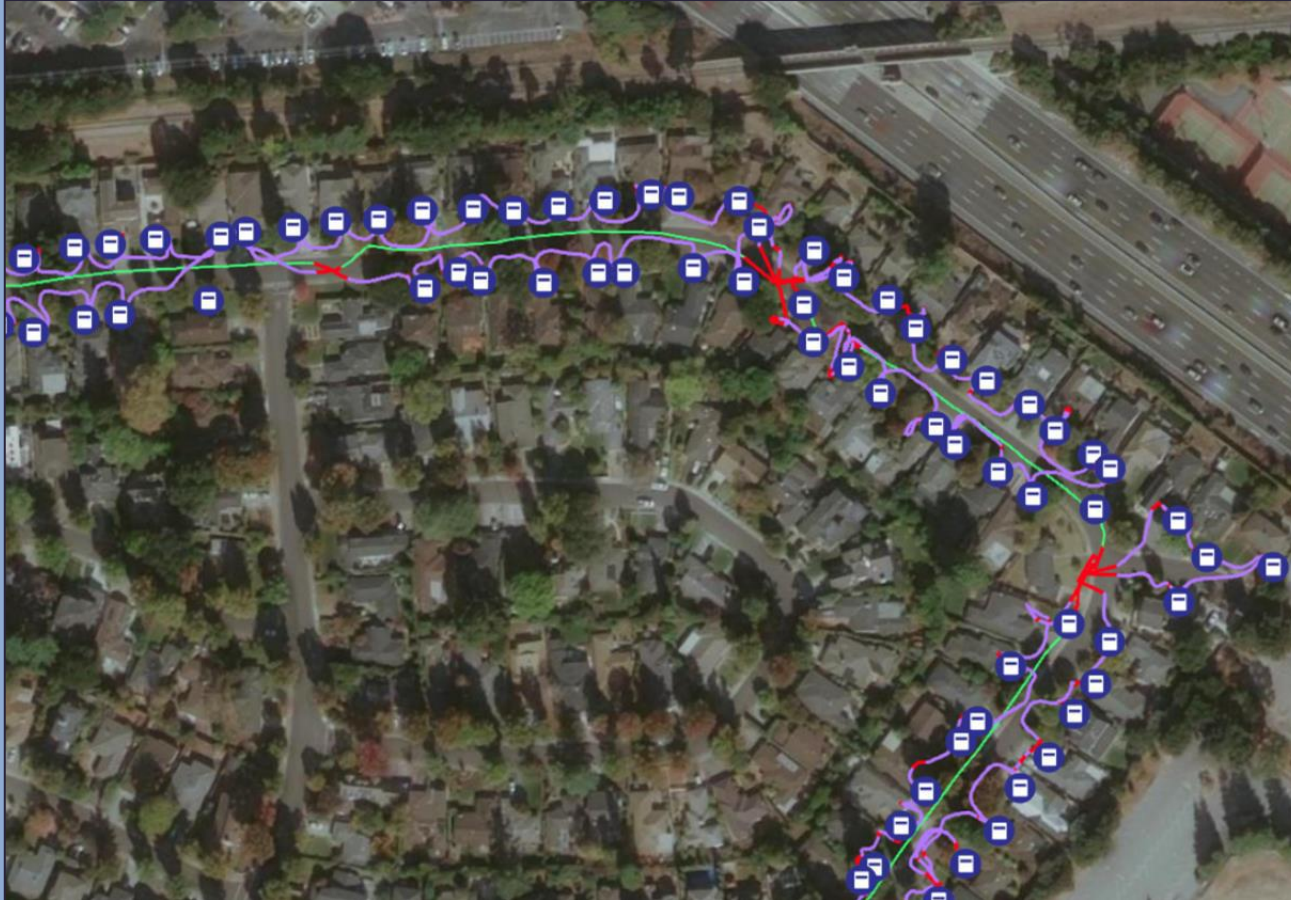 - Geo events
  - Scan events

Digital Street Review (DSR)

- Maps carrier activity along the route using MDD breadcrumbs

  - Driving – **Green**
  - Walking – **Purple**
  - Stationary – **Red**
  - Uncharacterized – **Blue**

Digital Street Review (DSR)

- Multiple map views:
  - Satellite Imagery
  - Open street map
  - Terrain views
  - Google street view

- Map layers:
  - Delivery points
  - Scan events
  - Property boundaries
  - 3D imaging

Digital Street Review (DSR)

- DSR displays route information in various formats

- Icons indicate:
  - Mailbox locations – blue icons
  - Property boundary lines – green polygons
  - Buildings – orange polygons

Digital Street Review (DSR)

Digital Street Review (DSR)

- Animated playback feature to assist with visualization

- Shows the carrier with elapsed times as they travel and deliver the route

- Searchable by delivery segment, scan event, or time stamp
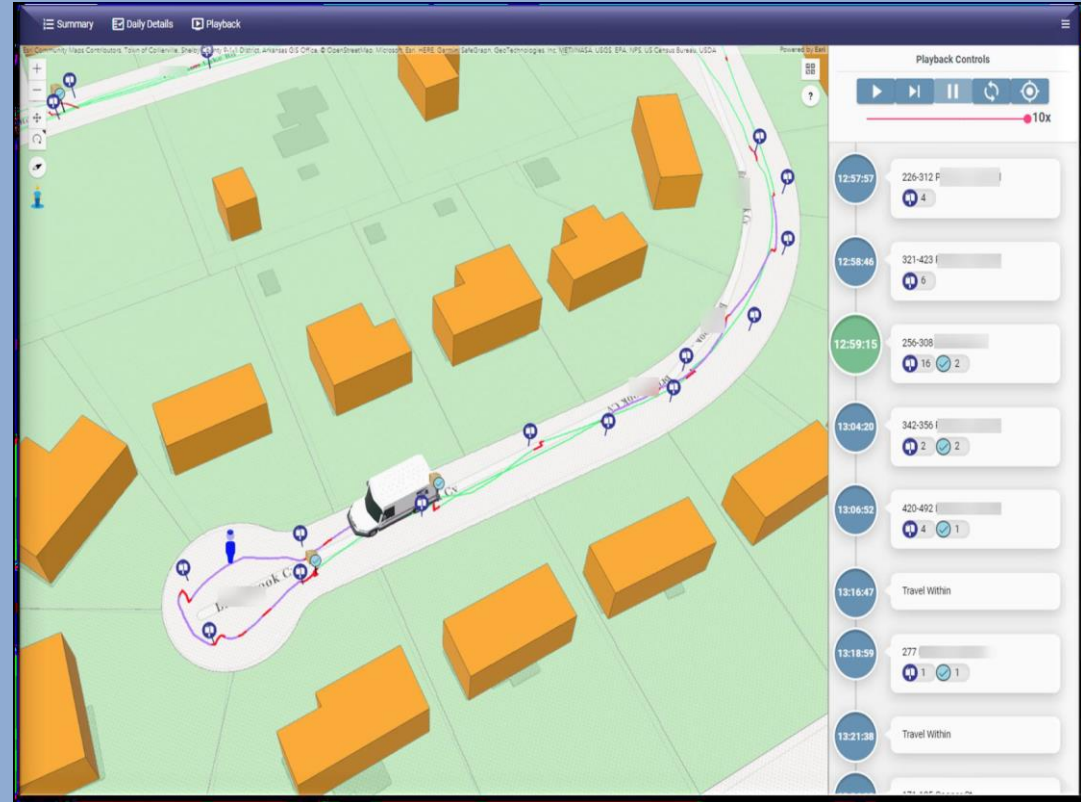
Digital Street Review (DSR)

Daily Summary - Provides an overview of the carrier's day

- Total street & net street time
- Allied times
- Major street events
- Percentage of ZIP+4 visited

- Scan Information
- Recurring, nonrecurring, and other durations

Daily Details - Provides a line-by-line description of the day similar to a PS Form 3999

- Address range or event type
- ZIP+4
- Start and end times
- Duration of the event

- Number of scan events
- Any agreed upon edits to time entries
- Number of active deliveries

Digital Street Review (DSR)

Events and delivery times are automatically flagged (highlighted in red) when they exceed certain parameters

- Teams review and edit these events/deliveries as agreed upon
  - Loading Time   22:00
  - Unloading Time   7:00
  - Signature Required Scan   3:00
  - Relay Time   1:35
  - Delivered / Other Scan   1:00
  - Miscellaneous Other (Stationary Time)   7:00
  - Business Curbline, Centralized, CBU   0:32
  - Business Other   0:30
  - Residential Curbline, Other   0:32
  - Residential CBU / Centralized   0:30

Digital Street Review (DSR)

- Teams discuss, review, and edit, if necessary, all 3999 events recorded in the DSR system

  - Accident
  - Animal Interference
  - Backtracking
  - Break
  - Customer Contact
  - Deadhead Time
  - Inside delivery unit
  - Load/Unload Time
  - Lunch
  - Management Time

  - Miscellaneous Other
  - Parcel Delivery
  - Parcel Pickup
  - Personal Needs
  - Pivot
  - Relays
  - Travel to, from, and within
  - Waiting For Relays
  - Waiting For Transportation
  - Waiting Other

TIAREAP

The People

Structure

National Oversight Team

↓
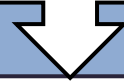
Area/Regional Team (ART)

↓

District Lead Team (DLT)

↓

Route Evaluation and Adjustment Team (REAT)

↓

Local Office Contacts (LOCs)

National Oversight Team

- One NALC and one USPS representative
  - Appointed by USPS VP Delivery Operations and NALC National President
  - Oversee the process at the national level

- Develop training materials on the TIAREAP process
  - Jointly conduct training sessions
    - HQ teams
  - All TIAREAP team members and back-ups

- Oversee the Area/Regional Teams
  - Resolve issues elevated by the ARTs

Area/Regional Team (ARTs)

- One NALC and one USPS
  - Appointed by National Business Agent (NBA) and Director of Field Operations Support (DFOS)

- Responsibilities:
  - Understanding of MOUs and all aspects of the process
  - Monitor the process, workload, and adherence to timelines
  - Oversee, communicate, and track progress of DLTs and REATs
  - Communicate progress to national oversight team
  - Resolve issues elevated by the DLTs
    - If necessary, elevate unresolved issues to the national oversight team within three working days

District Lead Team (DLT)

- One NALC and one USPS
  - One in each of the fifty postal districts
  - Appointed by the NBA and DFOS

- Responsibilities:
  - Understanding of MOUs and all aspects of the process
  - Oversee the process and adherence to time-lines within the district
  - Selection of zones for evaluation
  - Prioritize/schedule zones
  - Assign REATs to selected zones and track progress
  - Select Live Week of data collection
  - Verify post-adjustment base data in DOIS – forward copies of all adjustment data to ART
  - Perform REAT technician duties as necessary
  - Communicate with ARTs – 3999s needed, scheduling of REATs, impasse issues

District Lead Team (DLT)

- Ensure:
    - COR technician availability – one USPS/one NALC
    - DSR availability in each zone – report to ART when DSR is unavailable
    - COR data prep is reviewed and complete
    - PS Form 3999 process is followed
    - Local standup talk is provided
    - Local Office Contact Pre-Evaluation Questionnaire is complete, and issues addressed as needed

- Conduct post-adjustment review
    - If necessary, assign REAT to perform review

- Assist locals with minor corrections/simple territory changes

Route Evaluation and Adjustment Team (REAT)

- Minimum of four REATs plus one DLT per USPS district
- NALC team members appointed by NBA with assistance from the branch presidents
- Responsibilities:
  - Understanding of MOUs and all aspects of the process
  - Frequent communication with Local Office Contacts (LOCs)
    - Explain process and duties
    - Local Office Pre-evaluation Questionnaire completion
    - Ensure stand-up talk is provided
    - Scheduling carrier consultations – Live Week, evaluation, adjustment
    - If necessary, assist with scheduling traditional PS Forms 3999
    - Assist LOCs with issue resolution related to TIAREAP

Route Evaluation and Adjustment Team (REAT)

- Conduct evaluation and adjustment process per TIAREAP guidelines:
  - Review all data for anomalies and data integrity issues
  - Maximize use of DSR
  - PS Form 3999-DSR/PS Form 3999 process
  - Joint carrier consultations
  - Facilitate adjustments with COR technicians

- Ensure:
  - Adherence to TIAREAP timelines
  - Issues identified on the Local Office Pre-evaluation Questionnaire are considered in the evaluation process
  - LOCs perform necessary responsibilities
  - Unit records/base data are updated post-adjustment
  - If necessary, impasse issues are elevated to DLT

Local Office Contacts (LOCs)

- One NALC and one USPS representative
  - Selected by local branch president and district manager (or designee)

- Responsibilities:
  - Reading MOUs and becoming familiar with the process

  - Provide DLT/REAT:
    - Completed Local Office Pre-evaluation Questionnaire
    - Current seniority list
    - Vacancy/replacement carrier information
    - Potential data integrity issues
    - PS Form 3999 data
    - Assistance with territory adjustments

Local Office Contacts (LOCs)

- Responsibilities:
  - Communication between REAT and all local parties – carriers, supervisors, union stewards, postmasters/station managers

  - Jointly conduct carrier stand-up talk

  - Provide carriers with evaluated times prior to adjustment consultation

  - Ensuring Workhour Workload Report posting and PS Form 3999 process is followed locally

  - Provide carriers with PS Form 1840-R prior to adjustment consultation

  - Validate COR generated travel times

Carrier Optimal Routing (COR) Technicians

- Team of two – one USPS/one NALC

- Appointed by NBA and DFOS

- Responsibilities:
  - Ensure COR data prep is completed in selected zones
  - Complete territory adjustment scenarios with assistance of DLT/REAT and LOCs
  - Provide PS Form 1840-R to DLT/REAT for distribution to LOCs
  - Provide any necessary COR reports for DLT/REAT review

TIAREAP

The Process

TIAREAP

- Applies to all routes which include casing and delivery of mail
  - *Excludes - parcel post and collection routes*

- Only evaluation and adjustment process for the duration of the agreement

  Overview of what's included in the MOU:
  - Zone selection and data analysis periods
  - Review of volume, office, and street time for anomalies
  - Office and street evaluations using DOIS and DSR
  - Carrier consultations
  - Adjustment process
  - Automatic review process
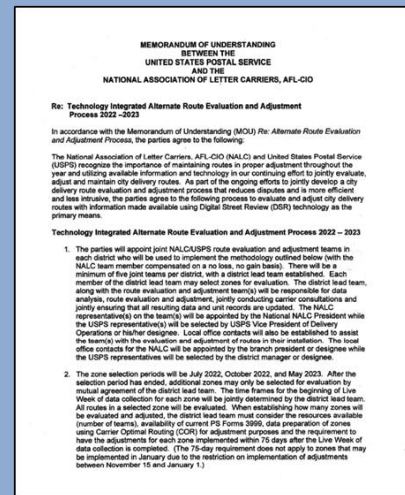
Zone Selections

- Zone (ZIP Code) selection
  - DLTs select zones to opt-in
    - Input from the branch presidents and NBAs/regional offices

  - Three selection periods
    - July 2022, October 2022, and May 2023

  - All routes in a selected zone will be evaluated

  - Additional zones may be added by mutual agreement

  - After evaluation of a zone, DLTs may agree no adjustments are necessary

Data Analysis

- Data analysis period includes a total of eight weeks:

  - Seven random weeks from the seven months prior to the Live Week
    - Random lots were drawn at the national level

Plus +

  - A Live Week of DSR data collection jointly selected by the DLT

  - June, July, August and December are excluded from both selections

Live Week of Data Collection

- Live Week of DSR data collection
  - Dates selected by the DLT
  - Carriers perform the route as they normally would
  - No inspectors in the delivery unit

- DLT/REAT
  - Analyze DSR data
    - Make necessary edits
    - Ensure appropriate time is recorded for all events
    - Includes auxiliary assistance
  - Conduct carrier consultations
  - Create PS Form 3999-DSR from representative day after consultation

Evaluated Times

- REATs will select representative office and street times using the regular carrier's (or mutually agreed upon replacement carrier) data

- Office evaluations
  - DOIS Workhour Workload data from seven random weeks plus the Live Week

  - REAT will select whichever is lower:
    - Actual average office time during the evaluation period
    - Standard office time for the route based on 18/8/70 plus fixed office time

- Street evaluations
  - REAT will choose either the DSR average street time for:
    - The seven random weeks plus the Live Week
    - The Live Week

Carrier Consultations

- Jointly conducted by REAT or DLT
  - Virtual via Zoom

- Minimum of three consultations
  - Live Week
    - Feedback on DSR recorded activities
    - REATs can edit DSR events based on carrier input

  - Evaluation
    - Carrier input on evaluated office and street times
    - Prior to selection of evaluated times for adjustment

  - Adjustment
    - PS Form 1840-R provided at least one day prior to consultation
    - Feedback on proposed territory changes or adjusted route times
    - Prior to any adjustments being finalized

Adjustments

- Guided by M-39 Sections 243.21.b, 243.22, 243.23

- Current PS Form 3999-DSR/PS Form 3999 used for moving territory
  - Created from a representative day during the Live Week
  - Must have a consultation with the carrier

- COR will be used if data prep is current and complete
  - COR Techs will perform the adjustment
  - LOCs with territorial knowledge will assist
  - REATs will participate and have final approval on all adjustments

Post Adjustment

- DLT/REAT will ensure unit DOIS route base data is updated to reflect jointly agreed upon adjustment data

- LOCs may jointly submit to DLT requests to make simple territorial changes to correct any obvious errors with the initial adjustment

  - If approved, the LOCs will send DLT all necessary data so they may update their records and ensure proper recording of any changes in the adjustment data

Adjustment Review Process

- Automatically required by the MOU

- DLT review of the adjustment
  - Within 90 days (between days 60 and 90 post implementation)
  - If necessary, assign REAT to perform evaluation and adjustment
  - Data from days 30-60 post implementation used for follow-up evaluation and adjustments (if necessary)
  - REAT may mutually agree to use a different period

- All routes will be evaluated

- Territory adjustments only to routes necessary to get as close to 8 hours as possible

Adjustment Review Process

- DLT/REAT create PS Form 3999-DSR
  - All routes in the zone
  - Agreed upon representative day
  - Consultation conducted with the regular or representative carrier prior to importing edited DSR data into DOIS

- If a PS Form 3999-DSR cannot be created, a traditional PS Form 3999 will be completed for the route

- Following implementation of any review adjustment the DLT/REAT
  - Create a new PS Form 3999-DSR for any adjusted route using an agreed upon representative day after consultation with the regular carrier
  - Ensure unit records are updated to reflect the review adjustment

Locally Developed Processes

- If a locally-developed joint route adjustment process began prior to signing of the MOU (5/10/22)
  - Route adjustments can be implemented
  - Adjustments are subject to the TIAREAP review process

- In all other zones, locally-developed joint route adjustment processes must be submitted to the national oversight team for approval
  - Memorandum of Understanding RE: Alternative Evaluation and Adjustment Processes (M-01984)

Issue Resolution

REAT – Any issue the team is unable to resolve will immediately be referred to the DLT

⬇

DLT – Any unresolved issues from a REAT will be referred to the ART within 2 working days of receipt of the issue

⬇

ART – Any unresolved issues from a DLT will be referred to the national oversight team within 3 working days of receipt of the issue

⬇

National Oversight Team – will resolve any impassed issues from the ART within 4 working days of receipt

TIAREAP

What's next?

Training Sessions

- Conducted four training sessions
  - District Lead Teams (DLTs)
    - June 7 – 10
  - Route Evaluation and Adjustment Teams (REATs)
    - June 28 – 30
    - July 12 – 14
    - July 26 – 28

- Carrier Optimal Routing (COR) technicians
  - COR Techs from all 50 USPS districts
  - August 29 – September 1

What's Next ?

- NBAs and branch presidents
  - Zones selected – notification of USPS selections
  - Selection of Local Office Contacts (LOCs)

- REATs
  - Notification to the LOCs
    - Live Week of data collection
    - Compilation of information relevant to the evaluation and adjustment process
    - Consultations with carriers – Live Week, Evaluation, and Adjustment

- LOCs
  - Joint standup talks
  - Provide office and street evaluations
  - Provide PS Form 1840-R to carriers

What do carriers need to know ?

- MDD – TR
  - Login/set-up is key
  - Encourage proper scanning events and locations

- During the Live Week
  - Perform duties and the route normally
  - Always carry scanner
  - Candid feedback during the consultation
    - Carrier input is crucial on allied time entries

- Consultations
  - Essential to a good evaluation and adjustment
  - Carrier's opportunity to educate the REAT about the route
    - New growth, edit book issues, mail rooms, parcel pickups, etc.

Questions?

Q + A