DEPARTMENT OF THE TREASURY
INTERNAL REVENUE SERVICE
WASHINGTON, D.C. 20224

SMALL BUSINESS/SELF-EMPLOYED DIVISION

Date: 08-30-2023

Control Number: SBSE-25-0823-0035
Expiration Date: 08/30/2025
Affected IRM(s): 25.31.1

MEMORANDUM FOR MANAGERS OF SHARED ADMINISTRATIVE SUPPORT EMPLOYEES

FROM: Rashaunda B. Simmons   *Rashaunda Simmons*   Digitally signed by Rashaunda B. Simmons
                         Director, SB/SE Human Capital Office   Date: 2023.08.30 16:16:45 -05'00'

SUBJECT: Corporate Shared Support for Shared Administrative Associates and Assistants

Purpose: This memorandum issues interim guidance to SB/SE Collection and Exam, LB&I, and TEGE regarding the Corporate Shared Support Program until new IRM 25.31.1 is published. The guidance is applicable to SB/SE Field Collection, SB/SE Field Exam, LB&I, and TEGE groups nationwide. Please ensure that this information is distributed to all affected employees within your organization.

Background/Source(s) of Authority: In May 2015 the Future State Corporate Secretarial and Clerical Support Initiative was launched to identify an effective, efficient approach to address business unit administrative support needs in the field. Due to significant attrition of the GS-318-5 Secretary Position, which was down 70%, it became critical to identify an enterprise-wide approach to provide administrative support. A potential solution was to formalize the ongoing and ad-hoc informal sharing arrangements some managers were utilizing. This concept was tested in two pilots during 2016 and 2017. In October 2017 the Senior Executive Team approved the implementation of the shared support model. In November 2018 a Memorandum of Understanding (MOU) was signed with NTEU which included SB/SE, LB&I, and TE/GE. The new model established support staff levels identified as Assistants (GS-303-5) and Associates (GS-303-5/6). The Assistant position is incumbent only. In December 2018 all 0318 Field Secretaries were transitioned to 0303 Shared Administrative Assistants. In May of 2021 this initiative transitioned from SB/SE Commissioner project status to a program residing in the SB/SE Human Capital Office.

Effect on Other Documents: This guidance will be incorporated into IRM 25.31.1 by 08/30/2025.

Effective Date: 08-30-2023

Contact: Jeannette Maurer, Management and Program Analyst, SB/SE Operations Support, Org Support & Continuity of Ops

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Attachment - Interim Guidance: SBSE-25-0823-0035

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IRM 25.31.1
Corporate Shared Support Program:

(1) A Corporate Shared Support Analyst will analyze the current payroll reports to confirm the status of all current Shared Administrative Associates/Assistants (SAA). The analyst will use the analysis to determine new, returning, exiting, and detailed SAA's.
(2) A Corporate Shared Support Analyst will identify and assign sharing arrangement(s) for Shared Administrative Associates and Assistants.
(3) For the purposes of the Corporate Shared Support program, SB/SE Field Collection, SB/SE Field Exam, LB&I, and TEGE are considered distinct functions/business units/operating divisions.
(4) Shared Administrative Associates will be assigned a cross functional sharing arrangement. This sharing arrangement will be made with a business unit different from the reports to group.
(5) Shared Administrative Assistants will be assigned a functional sharing arrangement. This sharing arrangement will be made within the same business unit as the reports to group.
(6) Sharing arrangements will be assigned after an initial training period of 120 days for new hire Shared Support Associates.
(7) Existing Shared Support Associates/Assistants will be assigned new arrangements immediately upon the loss of a sharing arrangement.
(8) Generally, sharing arrangement assignments are prioritized by on-site, commuting distance, and remote locations.

25.31.1
Hiring:

(1) Corporate Shared Support will review Shared Support Associate/Assistant staffing levels annually at a minimum.
(2) Corporate Shared Support will analyze each business unit's hiring request with current staffing levels to develop a hiring plan.
(3) Corporate Shared Support will review the approved hiring plan with each business unit and then create the hiring announcement with assistance from SB/SE Human Capital Office and employment.
(4) Corporate Shared Support will develop hiring instructions for the hiring business units.
(5) Corporate Shared Support will maintain communication with the hiring business units throughout the hiring process and track the progress of each vacancy.
(6) Business Units approved for hiring will complete the interview process and on-boarding for their selected hires.
(7) Corporate Shared Support will initiate the unified work request (UWR) for SAA new hire equipment.

Attachment – Interim Guidance: SBSE-25-0823-0035

25.31.1
Shared Administrative Associate/Assistant:

    (1) The Shared Administrative Associate/Assistant will provide administrative support to two managers and groups consisting of professional and technical employees both remotely and on-site as well as perform common administrative tasks as needed for the post-of duty.

    (2) The initial manager assigned to the Shared Administrative Associate upon hire is the "Report to Manager". The additional "Sharing Manager"/Group will be assigned to the Shared Administrative Associate/Assistant formally by a Corporate Shared Support Analyst.

    (3) The Shared Administrative Associate/Assistant can support up to 30 employees. These employees may be at the same POD as the SAA or at remote locations. Informal arrangements are not allowed.

    (4) The Shared Administrative Associate/Assistant time will be split evenly between the assigned managers. Neither manager will have priority over another.

    (5) The assigned managers will list the Shared Administrative Associate/Assistant general/routine tasks with respective priorities in the guidance memo and duties checklist. This document is completed by the managers at the onset of a sharing arrangement. Once the managers agree with the tasks to be completed and the assignment of priority, this document is reviewed with the Shared Administrative Associate/Assistant and signed by all parties. A completed copy must be shared with the Corporate Shared Support office.

    (6) Common POD tasks to do not require a formal sharing arrangement. These tasks may include mail distribution, retrieving mail, control mail suspense items, routing mail directly to the appropriate person or office, follow-up on outstanding controls, research background information before routing information to the appropriate individual, greeting taxpayers, and boxing case files for shipping.

The following changes are hereby effective 08/30/2023 for IRM 25.31.1.