

July 31, 2025

VIA ELECTRONIC MAIL

Richard Lucas
Principal Deputy & Acting Assistant Secretary & Chief Financial Officer
U.S. Department of Education
400 Maryland Ave, S.W.
Washington, D.C. 20202

RE: Expedited national grievance on behalf of the American Federation of Government Employees, Local 252

Dear Mr. Lucas:

On behalf of the American Federation of Government Employees Local 252 ("Local 252"), we are writing to invoke the negotiated, expedited grievance procedure as outlined in Article 42, Section 8 of the Collective Bargaining Agreement ("CBA") between the U.S. Department of Education ("the Department" or "ED") and Local 252. This grievance seeks to remedy the "Reduction-in-Force" ("RIF") within Federal Student Aid ("FSA") that the Department began on or about March 11, 2025 and which the agency has announced will take effect on August 1, 2025. This grievance asserts both contractual violations and unfair labor practices, insofar as the Department has violated Article 21 of the CBA, 20 U.S.C. § 1018, 5 U.S.C. § 2301(b), 5 U.S.C. §§ 7116(a), as well as all other relevant provisions of the CBA, laws, rules, and regulations. The union is filing on behalf of all bargaining unit employees within Federal Student Aid who are subjected to the RIF.

Local 252 also understands that approximately 270 FSA employees in the bargaining unit have separation dates of August 1, 2025 and six FSA employees in the bargaining unit have separation dates later in August. This grievance covers all FSA bargaining unit employees who have been subject to the RIF.

¹ Because employee RIF notices were sent from Jacqueline Clay, Deputy Assistant Secretary and Chief Human Capital Officer, pursuant to CBA § 42.09(C), this grievance is being filed with Principal Deputy Assistant Secretary & Acting Assistant Secretary Richard Lucas. If the Department takes the position that Mr. Lucas is the incorrect official, we respectfully request that this be forwarded to, and considered filed with, the correct deciding official and/or allow additional time to serve the correct official.

² In a separate grievance, Local 252 contends the effectuation of a RIF on August 1, 2025 violates Article 21 of the CBA. Nothing about this grievance should be read to suggest that Local 252 accepts the Department's apparent position that the April 10, 2025 Notice satisfies the agreed upon notice requirements set forth in Article 21 of the CBA.

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1. **Name of Grievant:** AFGE Local 252 on behalf of RIF'ed bargaining unit employees in Federal Student Aid

2. Name of Immediate Supervisor: N/A

- 3. Organization (bureau, division, branch): U.S. Department of Education
- 4. **Type of Grievance (check one)**: Expedited / National
- 5. **Stage of Grievance**: Expedited / National
- **6.** Grievance relates to matters covered by the following section(s) of the negotiated agreement: Article 21 of the Collective Bargaining Agreement (CBA).
- 7.A. Details of the grievance³ are specified below.

Factual Basis

President Trump has long made clear his intention to dismantle the Department of Education, referring to the Department as "a big con job" and saying he would "like to close it immediately." *New York v. McMahon*, No. CV 25-10601-MJJ, 2025 WL 1463009, at *9 (D. Mass. May 22, 2025). In a campaign video from September 2023, President Trump claimed that "very early in the administration" he would be "closing up the Department of Education in Washington, D.C." *Id.*

Shortly after his election, President Trump selected now-Secretary Linda McMahon to lead the Department and put herself "out of a job." Secretary McMahon understood this—and later stated that President Trump was "dead serious . . . [that] [w]hen he asked me to serve as the secretary of Education I knew exactly what his mandate was, which is to close the Department of Education." On March 3, 2025, after her confirmation by the U.S. Senate, Secretary McMahon

³ Consistent with Article 42.05(F) of the CBA, the information contained herein states the "factual basis of the grievance" with "sufficient information for the deciding official to understand the basis for the grievance." Local 252 and/or its representative(s) reserve(s) the right to supplement this grievance, including the factual narrative, at any time.

⁴ Newsweek, *Trump on Education Secretary Pick: 'I Want Her To Put Herself Out Of A Job'*, YouTube (Feb. 4, 2025), https://www.youtube.com/watch?v=gIDvOZKPO-c.

⁵ Ashleigh Fields, *McMahon: Trump 'dead serious' that he 'wants me to fire myself'*, The Hill (Mar. 28, 2025), https://thehill.com/homenews/administration/5219563-mcmahon-trump-dead-serious-fire-myself/.

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called on Department employees to join with her on the agency's "final mission," which would "profoundly impact staff, budgets, and agency operations here at the Department."

On March 6, 2025, news outlets reported that the White House had drafted an executive order calling on the Secretary of Education to "take all necessary steps to facilitate the closure of the Department of Education." *New York*, 2025 WL 1463009, at *9.

Five days later, on March 11, 2025, referring to it as part of its "final mission," the Department announced that its workforce was being cut in half via a vast reduction in force initiative affecting "[a]ll divisions within the Department." FSA was among the offices hit hardest by the cuts. That same day, Secretary McMahon stated, during an interview with Laura Ingraham of Fox News, that the RIF was the "first step" in carrying out "the President's mandate" and complying with his "directive" to dismantle the Department of Education:

Ingraham: Now, is this the first step on the road to a total shutdown?

McMahon: Yes, actually it is, because that was the President's mandate. His directive to me, clearly, is to shut down the Department of Education, which we know we'll have to work with Congress, you know, to get that accomplished. But what we did today was to take the first step of eliminating what I think is bureaucratic bloat.⁹

On or about that same day, approximately 970 Department employees—including approximately 325 FSA employees who are members of the bargaining unit represented by Local 252—received an email from the Department's Chief Human Capital Officer ("CHCO"), Jacqueline Clay. That email began the process of implementing President Trump's "mandate" and "directive."

⁶ U.S. Dep't of Educ., *Secretary McMahon: Our Department's Final Mission* (Mar. 3, 2025), https://bit.ly/4iZLCUh.

⁷ U.S. Dep't of Educ., *U.S. Department of Education Initiates Reduction in Force*, (Mar. 11, 2025),

https://www.ed.gov/about/news/press-release/us-department-of-education-initiates-reduction-force.

⁸ Zachary Schermele, *Education Dept. cuts are here. What happens now to student loans, FAFSA and IEPs?*, USA TODAY (Updated Mar. 13, 2025, 3:18 p.m. ET), https://www.usatoday.com/story/news/politics/2025/03/12/education-department-cuts-student-loan-fafsa-iep-impact/82310137007/.

⁹ See Ingraham Angle, Education secretary says department took first steps to eliminate 'bureaucratic bloat', Fox News Network (Mar. 11, 2025), https://www.foxnews.com/video/6369901522112.

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Employees who received the email were told that they were to be subject to a reduction in force and would be "placed on paid administrative leave starting Friday, March 21, 2025." The email also informed recipients that they would have "limited equipment and systems access" during the "transition period." The email also made clear that the RIF decisions were *not* performance based, but rather were in support of Executive Branch directives, including both a government-wide executive order and a Guidance document from the Office of Personnel Management. The email stated in relevant part:

ED [i.e., the Department] has made the determination to initiate RIF procedures as part of the agency's restructuring process. These actions support Executive Order (EO) 14158, Implementing the President's "Department of Government Efficiency" Workforce Optimization Initiative, dated February 11 2025 and Office of Personnel Management Guidance on Agency RIF and Reorganization Plans, dated February 26, 2025. This decision in is no way a reflection of your performance or contributions, which we deeply appreciate.

See Exh. A.10

Consistent with the statements by President Trump, Secretary McMahon, and the CHCO, FSA did not independently decide to conduct the RIF. It was not proposed by FSA leadership. Rather, the RIF was conducted in an effort to follow instructions from President Trump—which Secretary McMahon understood to be both a "mandate" and a "directive."

Secretary McMahon's chief of staff, Rachel Oglesby, "supervised the planning and execution" of the RIF; FSA had no decision-making authority about the initiation of the RIF. Rather, upon information and belief, FSA was instructed by the Department (including from officials affiliated with the "Department of Government Efficiency") to achieve a reduction in force of approximately 700 individuals. On information and belief, FSA believed that it had no choice but to follow the Department's RIF instructions.

The Acting COO informed FSA leadership of the impending RIFs approximately 10 minutes before the Department issued the March 11, 2025 press release. As evidence of FSA's

¹⁰ The March 11 email erroneously conflated two distinct Executive Orders. On February 11, 2025, the President issued EO 14210 entitled "Implementing the President's 'Department of Government Efficiency' Workforce Optimization Initiative. *See* 90 Fed. Reg. 9669 (Feb. 14, 2025). Executive Order 14158—cited in the March 11 email—was issued on January 20, 2025,

and is entitled "Establishing and Implementing the President's 'Department of Government Efficiency" *See* 90 Fed. Reg. 8441 (Jan. 29, 2025).

¹¹ Decl. of Rachel Oglesby at ¶ 5, *State of New York v. McMahon*, No. 1:25-cv-10601-MJJ (D. Mass June 3, 2025), ECF 139-1.

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lack of involvement in the process, FSA leadership began preparing *post hoc* impact statements the day *after* the RIFs were announced.

That same day or the day after, the Department's Office of Chief Information Officer ("OCIO") significantly restricted email and technology access for affected FSA employees. FSA leadership had not been made aware of that decision prior to implementation and had no authority to alter those restrictions.

On March 20, 2025, the day before impacted FSA employees were placed on Administrative Leave, President Trump issued Executive Order 14242, 90 Fed. Reg. 13679 (March 25, 2025), directing Secretary McMahon to "take all necessary steps to facilitate the closure of the Department of Education."

On April 4, 2025, Local 252 leadership had a meeting with Department officials in which they made a series of information requests pursuant to 5 U.S.C. § 7114. The agency responded in writing on April 8, 2025. Among the questions, Local 252 asked "who (specifically) identified the persons to be RIF'ed?" The agency's response did not even purport to identify a person, role, or category of persons involved in the decision, other than to say "the agency," without any differentiation between ED and FSA. Local 252 also asked how the transfer of statutorily mandated functions was being carried out when employees doing the work were RIF'ed. The agency responded that "[a] determination has not yet been made regarding any transfer of statutorily mandated functions."

On April 10, 2025, countless Department employees—including FSA employees who are members of the bargaining unit represented by Local 252—received an individualized "Notice of Separation Due to Reduction in Force." ("April Notice"). The April Notice, sent by Ms. Clay in her capacity as the CHCO, stated that the separation for impacted individuals due to the RIF would take effect on June 10, 2025.

On May 22, 2025, the U.S. District Court for the District of Massachusetts entered a preliminary injunction enjoining the Department from carrying out the RIF, as announced on March 11. New York v. McMahon, __ F. Supp. 3d ___, No. 25-cv-10601-MJJ, 2025 WL 1463009, at *40 (D. Mass. May 22, 2025). Although both that court and the U.S. Court of Appeals for the First Circuit declined the Department's request to stay the injunction, New York v. McMahon, No. 25-1495, 2025 WL 1503501, at *1 (1st Cir. May 27, 2025), the U.S. Supreme Court, on July 14, 2025, stayed the injunction "pending the disposition of the [substantive] appeal [of that injunction] . . . in the United States Court of Appeals for the First Circuit." McMahon v. New York, No. 24A1203, 2025 WL 1922626, at *1 (U.S. July 14, 2025). The Supreme Court did not explain its rationale.

On July 14, 2025, an unknown number of FSA employees received an email from Ms. Clay, again in her capacity as the "Chief Human Capital Officer" for the Department. The email stated that, following the Supreme Court's decision, "the Department of Education"—not FSA—

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was "continuing with the reduction in force (RIF)" issued on April 10. According to Ms. Clay, each employee's separation date was "adjusted to August 1, 2025." 12

Basis for Grievance

Contractual Violations

Articles 10 and 21 of the CBA requires the agency to comply with all "applicable laws and regulations and written Department policy" when conducting a reduction in force. The Department has violated this in several ways.

I. The FSA RIF violates FSA's statutorily guaranteed independence.

Federal Student Aid is a "Performance Based Organization" ("PBO") within the Department, governed by section 141 of the Higher Education Act of 1965, as amended ("HEA"). 20 U.S.C. § 1018. As part of the Higher Education Amendments of 1998, P.L. No. 105-244, Congress crafted the PBO to give FSA "independence" from the Secretary. To achieve this end, it created a structure whereby the Secretary "maintained responsibility for the development and promulgation of policy and regulations," but Federal Student Aid maintained the authority to "exercise independent control of its budget allocations and expenditures, personnel decisions and processes, procurements, and other administrative and management functions." 20 U.S.C. §§ 1018(b)(1), (b)(4). The HEA also provides that FSA "shall not be subject to any ceiling relating to the number or grade of employees." 20 U.S.C. § 1018(g).

The Department's decision to initiate and effectuate a RIF—thus carrying out President Trump's "directive" and "mandate"—constituted both a decision regarding the "control of [FSA's] budget allocation and expenditures," and a "personnel decision and process." 20 U.S.C. § 1018(b)(4). The implementation of the RIF also removed "administrative and management functions" from FSA. Because the decision to conduct the RIF was not made by FSA Management—but rather by the Secretary to serve the President's policy goals—the Department and Secretary McMahon deprived FSA of its statutory independence. This act violates § 141 of the HEA, 20 U.S.C. § 1018(b) and therefore also violates section 10.04(d) of the CBA.

II. The FSA RIF violates the Department's Written Policies Regarding FSA "Independence."

In addition to violating the statutory grant of "independence" to FSA, the Department's implementation of the RIF for FSA violates its written internal policies implementing § 1018, including specifically with respect to Human Resources and employment functions.

a. **Delegation EA/EN/58**. In January 2006, then-Secretary Margaret Spellings adopted delegation of authority EA/EN/58, delineating FSA's role with respect to the independent management of its functions. Under that delegation, the Department made clear that (a) "[b]ecause

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¹² But see supra n.2

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of [FSA's] PBO status, FSA is not subject to any ceiling relating to the number or grade of its employees"; and (b) FSA had the authority to "carry out Reductions-in-Force for FSA, in coordination with [the Department]." These two provisions make clear that, although FSA would be charged with "coordinat[ing]" any RIFs with the Department, it retained the authority to make the decision as to whether, when, how, and why to "[c]arry out" a RIF at FSA. Delegation EA/EN/58 is a written policy that remains in effect.

b. **Delegation EN/EK/230**. In July 2024, Denise Carter—in her capacity as Acting Chief Operating Officer for Federal Student Aid and "pursuant to 20 U.S.C. §1018"—purported to delegate to the "Deputy Assistant Secretary for Human Resources, Chief Human Capital Officer" the "procedural functions and duties" contained in EA/EN/58 "in coordination with and subject to the direction of the FSA Chief Operating Officer." The document then states:

Consistent with 20 U.S.C. § 1018, FSA shall continue to exercise independent control of its budget allocations and expenditures, personnel decisions and processes, procurements, and other administrative and management functions while receiving support from Human Resources services from the Office of Finance and Operations, Human Resources Office.

This Delegation, which constitutes a "written policy" from the Department: (a) establishes FSA's understanding of its statutory independence; (b) received concurrence as to that independence from the Department's Office of the General Counsel; and (c) expressly confirms that FSA retained—and did not delegate away—its statutorily mandated "independence" as it relates to the "control of its budget allocations and expenditures, personnel decisions and processes, procurements, and other administrative and management functions," as well as its "management functions," even if it would be receiving "support" from "Human Resources services" within the Office of Finance and Operations.

Because the RIF violated "written Departmental policy," as reflected in at least EN/EK/230 and EA/EN/58, the Department violated section 10.04(d) of the CBA.

III. The FSA RIF is "arbitrary" under Merit Systems Principles and the Administrative Procedure Act.

Under the Civil System Reform Act, 5 U.S.C. § 2301(b)(8)(A), "[e]mployees should be protected against arbitrary action." *See, also, e.g.*, 5 U.S.C. § 706(2)(A) (requiring "arbitrary and capricious" agency actions be "set aside"). The FSA RIF was arbitrary in numerous ways, including because agency actions must be the "product of reasoned decisionmaking" and consider "important aspect[s] of the problem" they are trying to address. *Motor Veh. Mfrs. Ass'n*

¹³ Federal Student Aid, Memorandum from Chief Operating Officer, Federal Student Aid to Office of Finance and Operations, et al. re: Redelegation of FSA Human Resources Authority to Office of Finance and Operations, Office of Human Resources (EN/EK/230) (certified July 30,

2024) (emphasis added).

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of U.S., Inc. v. State Farm Mut. Auto. Ins. Co., 463 U.S. 29, 43, 52 (1983). The Department has provided no indication that the FSA RIFs are the "product of reasoned decisionmaking." And in fact, evidence establishes the contrary. When effectuating the RIFs, the Department failed to grapple with the potential impact on FSA operations (including FSA's statutorily mandated functions), as well as FSA's statutory "independence." For example, FSA management was not asked to provide and/or did not start to prepare "impact statements" regarding the RIFs until after the RIFs were announced. The Department has likewise failed to justify the imposition of a ceiling on the number of employees in FSA.

IV. The FSA RIF violates constitutional separation of powers, violates the "take care" clause of the U.S. Constitution, and is *ultra vires*.

The Constitution vests the legislative power in Congress, including "the establishment of offices, [and] the determination of their functions and jurisdiction." *Myers v. United States*, 272 U.S. 52, 129 (1926); U.S. Const. art. I, § 1. "There is no provision in the Constitution that authorizes the President to enact, to amend, or to repeal statutes." *Clinton v. City of New York*, 524 U.S. 417, 438 (1998). Instead, the President "shall take Care that the Laws be faithfully executed." U.S. Const. art. II, § 3. There is no statute, constitutional provision, or other source of law that authorizes the Executive to carry out a RIF at FSA that would so severely impair FSA's ability to comply with and carry out its statutory functions.

The Executive Branch has no power to dismantle Congressionally created departments and programs through mass terminations. By firing significant numbers of staff and eliminating entire offices, branches, and/or divisions within FSA, the RIF has effectively disabled FSA from carrying out its statutory duties. The FSA RIF violates the separation of powers by usurping the legislative function and violating the Executive's duty to take care that the laws be faithfully executed. Because it is in excess of the Executive's Constitutional and statutory authority, it is also *ultra vires*.

Unfair Labor Practices

In addition to violating the CBA, the FSA RIF also constitutes an unfair labor practice. Under 5 U.S.C. § 7116(a)(7), it is an unfair labor practice for the Department to "enforce any rule or regulation . . . which is in conflict with any applicable collective bargaining agreement" that was "in effect was in effect before the date the rule or regulation was prescribed."

The FSA RIF is an enforcement of a "rule or regulation" in two respects. *First*, the RIF was part of the Department's effectuation of Executive Orders 14158¹⁴ and 14242, as described above. *Second*, the RIF constitutes a "rule" within the meaning of 5 U.S.C. § 551(4). For the reasons stated above, because the FSA RIF also conflicts with the CBA between Local 252 and the Department, the FSA RIF constitutes an unfair labor practice.

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¹⁴ See supra n.10.

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In addition, based on the facts set forth above, the FSA RIF also constitutes an unfair labor practice under 5 U.S.C. § 7116(a)(1) and (8) because the Department (i) "interfere[d] with, restrain[ed], or coerce[ed]" FSA employees' rights; and (ii) failed or refused to comply with Title VII of the Civil Service Reform Act of 1978.¹⁵

7.B. Date Incident Occurred: The FSA RIF takes effect on August 1, 2025. 16

8. State specific relief sought.

- A. The Agency to comply with the CBA, all laws, and regulations.
- B. The Agency returns all bargaining unit employees within FSA to their duty status as it existed as of March 11, 2025, including system access, equipment access, and physical access to buildings, parking areas, etc.
- C. Any other action to make the Union and bargaining unit employees whole for these violations.
- D. Award back-pay and other relief pursuant to the Back Pay Act.

We look forward to hearing from you within 10 workdays, as provided in Section 42.09(D) of the CBA.

Respectfully,

Daniel A. Zibel Eric Rothschild Madeline Wiseman

NATIONAL STUDENT LEGAL DEFENSE NETWORK 1701 Rhode Island Ave. NW Washington, DC 20036 (202) 734-7495 Email: dan@defendstudents.org eric@defendstudents.org madeline@defendstudents.org

On behalf of AGFE Local 252

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¹⁵ Among other failures, the Department did not provide complete responses to Local 252's April 4 requests for information. Under 5 U.S.C. § 7114(b)(4) Local 252 is "entitled to information necessary to enable it to carry out effectively its representational responsibilities, including information which will assist it in the investigation, evaluation and processing of a grievance." *National Labor Relations Board and National Labor Relations Board Union Local 6*, 38 FLRA 506 (November 28, 1990).

¹⁶ But see supra n.2.

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cc: United States Department of Education Labor Relations (laborrelations@ed.gov)

Sheria Smith (President, AFGE Local 252) Rushab Sanghvi (General Counsel, AFGE) Denise Alves (Asst. General Counsel, AFGE)

Magen Stevens (Attorney, AFGE)

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EXHIBIT A



AFGE Local 252 <info@afge252ed.org>

FW: CHCO - Notice to Employees Impacted by Reduction in Force (RIF)

AFGE Local 252 <info@afge252ed.org> Draft

Mon, Mar 17, 2025 at 6:58 PM

From: Clay, Jacqueline < Jacqueline. Clay@ed.gov>

Sent: Tuesday, March 11, 2025 6:36 PM

To: CHCO < CHCO@ed.gov>

Subject: CHCO - Notice to Employees Impacted by Reduction in Force (RIF)

Dear Colleagues,

I am writing to share some difficult news. This email serves as notice that your organizational unit is being abolished along with all positions within the unit – including yours. Please note, if you elected to separate under another program e.g., Deferred Resignation Program, Voluntary Early Retirement Authority (Early-Out), or Voluntary Separation Incentive Payment (Buy-Out), you are NOT impacted by the Reduction in Force (RIF).

To provide you with the maximum opportunity to focus on your transition, you will be placed on paid administrative leave starting <u>Friday, March 21, 2025</u>.

- Please take immediate action to review and comply with the Instructions for Employees Impacted by the RIF (attached). This document contains important information regarding access to ED facilities, transitioning your work, and preparing for administrative leave.
- Ensure your Principal Operating Component (POC) has your current mailing address, and a good personal phone number and email address to contact you.
- During the transition period, you will retain limited equipment and systems access to enable official communications regarding your RIF standing. Please note:
 - You are only authorized to back-up your data to a network device or approved backup device.
 - You are prohibited from storing sensitive or mission-critical data on your systems' hard drive or handheld device.
 - All Department of Education system resources, including hardware, software programs, files, paper reports, and data are the sole property of the Department of Education, and there should be no expectation of privacy.

- Unauthorized or improper use of this system may result in disciplinary action, as well as civil and criminal penalties.
- No earlier than 30 days from the date of this email you will receive your official RIF notice, which will begin an additional 60 days of paid administrative leave prior to your separation from the agency.
- This will give you a total of 90 days on paid leave to help facilitate your transition.
- Your official RIF notice will provide more detailed information on your specific benefits and standing and be delivered to your mailing address on file.
- You will only retain your <u>Ed.gov</u> email to facilitate communications with the agency through March 21, 2025.

ED has made the determination to initiate RIF procedures as part of the agency's restructuring process. These actions support Executive Order (EO) 14158, Implementing the President's "Department of Government Efficiency" Workforce Optimization Initiative, dated February 11, 2025 and Office of Personnel Management Guidance on Agency RIF and Reorganization Plans, dated February 26, 2025. This decision is in no way a reflection of your performance or contributions, which we deeply appreciate.

I recognize that this is a challenging moment, and my team is committed to supporting you through this transition.

- > For additional information about Reductions in Force, visit the Office of Personnel Management RIF site.
- > For general questions regarding next steps, please email workforcereshaping@ed.gov.
- > For specific retirement or benefits questions, please contact benefits@ed.gov.
- ➤ Use the Employee Assistance Program, if needed. The Employee Assisstance Program (EAP) and WorkLife4You Program, provided by Federal Occupational Health (FOH), are available 24 hours a day, 7 days a week at 1-800-222-0364 (TTY: 1-888-262-7848) or at www.FOH4you.com or www.worklife4you.com.
- ➤ Should you lose access or need IT support, please contact the Help Desk at ocioenterprisehelpdesk@ed.gov; or call 202-708-HELP (202-708-4357) and select Option 2.

3/17/25, 6:59 PM Case 1:25-cv-10@RGE-McLil252 Man CRWNCHICO7-Invite to Emilioghed Impacted Red (RIF)
With regard,

Jacqueline Clay

Chief Human Capital Officer

Attachments:

Instructions for ED Employees Impacted by RIF

ED RIF Information and Resources

Benefits and Work/Life Email: Office Hours - Retirement Paperwork and Process