PACIFIC GAS AND ELECTRIC COMPANY

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May 1, 1987

Local Union No. 1245
International Brotherhood of
Electrical Workers, AFL-CIO
P. O. Box 4790
Walnut Creek, California 94596

Attention: Mr. Jack McNally, Business Manager

Gentlemen:

In accordance with the provisions of Attachment A of the 1979 Negotiations Settlement, the parties have mutually established a Clerical Position Evaluation System to replace the Clerical Cross-Hatch Index. The time limits set forth in Attachment A were mutually extended by Letter Agreement 82-111-PGE.

Enclosed with this letter are:

1. The cut-off point determination agreement. The employee population mix referenced in the second paragraph is 5.5% "A" level classifications, 10.4% "B" level classifications, 41.6% "C" level classifications and 42.5% "D" level classifications in the initial system study population.

2. The Administrative Guide for the Clerical Position Evaluation System.

The commitment established during the 1979 General Negotiations was to reevaluate all of the former Review When Vacant (RWV) jobs prior to any others. At the time this agreement was reached, neither Company nor Union was in a position to predict what the essential elements of the new job evaluation system would be. At the conclusion of negotiations in which the parties established the elements of the system, an initial implementation agreement was negotiated. A copy of that agreement is included in the Administrative Manual as an Appendix. As is provided in the implementation agreement, all covered employees will be required to complete a Position Evaluation Questionnaire during the System Study-Data Gathering phase. No jobs will be impacted by the new job evaluation system until the System Study is completed. Because the System Study will include all positions that are filled, all employees who are in those positions that were formerly designated "Review When Vacant" will be evaluated at the same time as all other positions. It has, therefore, been agreed that it is unnecessary to treat the formerly "RMV" positions any differently than other positions.

It is anticipated that following the System Study, it may not be possible to process all of the appeals within the time limits established in Chapter VI of the Administrative Manual. Therefore, by mutual agreement, the parties may extend the time periods specified for the processing of appeals. However, the parties may not agree to extend the time period specified for filing an appeal.

Further, since the Gas Chart Calculator positions do not meet the requirements established for positions that will be evaluated by the system, the parties agreed that Gas Chart Calculator positions be excluded from evaluation using the Clerical Position Evaluation system.

It is proposed that this Clerical Position Evaluation system be effective upon the execution date of this agreement and continue in effect until amended by mutual agreement, or until either party has given to the other 30 days' written notice of its termination.

If you are in accord with the foregoing and the attachments and agree thereto, please so indicate in the space provided below and return one executed copy of this letter to the Company.

Yours very truly,

PACIFIC GAS AND ELECTRIC COMPANY

By I.W. Bonbright
Manager of Industrial Relations

The Union is in accord with the foregoing and the attachments and it agrees thereto as of the date hereof.

LOCAL UNION NO. 1245, INTERNATIONAL
BROTHERHOOD OF ELECTRICAL WORKERS, AFL-CIO

May 15, 1987

By Jack McNally
Business Manager

ADMINISTRATIVE GUIDE

PG&E/IBEW

CLERICAL POSITION EVALUATION SYSTEM

TABLE OF CONTENTS
ADMINISTRATIVE GUIDE TO THE
PG&E/IBEW CLERICAL POSITION EVALUATION SYSTEM

CHAPTER V - USERS MANUAL - INSTRUCTIONS TO EMPLOYEES AND SUPERVISORS

CHAPTER VI - APPEALS PROCEDURE

CHAPTER VII - DEVELOPMENT OF THE CLERICAL POSITION EVALUATION SYSTEM

CHAPTER VIII - SYSTEM UPDATING PROCESS

APPENDIX

CHAPTER I

INTRODUCTION

CHAPTER I - INTRODUCTION

A. PURPOSE OF THE ADMINISTRATIVE GUIDE

The Administrative Guide has two major purposes:

1) To serve as the basic resource for the administration of the Clerical Position Evaluation System.

2) To serve as the basic resource for resolving appeals of position evaluations.

The Clerical Position Evaluation System was designed to be a stand-alone, easy-to-use system. It was the intent of the Company and Union that the Administrative Guide provide all information necessary to administer the system and to resolve appeals.

The Administrative Guide references several documents that are highly confidential. The Benchmark and Nonbenchmark Valuation Grids, Benchmark Skill Profiles, and Classification Point Guide are highly confidential and are to be seen only by specially designated Company Analysts and by specially designated Union Representatives who handle appeals. These documents will be provided under separate cover from the Administrative Guide.

The confidential sections are not to be reviewed by supervisors, employees, IBEW Business Representatives or any other individual who is not directly involved in the actual scoring or review of scoring in the appeals process.

The Administrative Guide is not designed for distribution to supervisors or employees. However, non-confidential sections of the Administrative Guide may be reviewed upon request by supervisors or employees in regional or departmental Human Resources offices. Copies of Chapter V, Users Manual, which is designed as a tool to assist employees and supervisors in completing the PEQ will be available at all Company headquarters where bargaining unit clerical employees report for work.

B. PURPOSE OF THE CLERICAL POSITION EVALUATION SYSTEM

The purpose of the Clerical Position Evaluation System is to fairly and equitably determine the proper classification for clerical positions at PGandE.

The system was developed by a joint Company/Union Committee with the assistance of consultants from Hamilton and Associates. The Company and Union jointly selected the consultants and shared responsibility for paying Consultant fees.

The Company and Union agreed to the joint developmental approach in an effort to resolve a long standing disagreement concerning clerical position evaluation. Guidelines that established criteria for the system were established in a 1982 Company/Union Letter of Agreement. Those guidelines further define the purpose of the Clerical Position Evaluation System. Those guidelines were:

> The Position Evaluation System will apply to following clerical classifications:
>
> a. Senior II level clerical jobs.
> b. Senior I level clerical jobs.
> c. Service Representatives, Operating Clerks, and Accounting Clerks.
> d. Utility Clerks (including Clerk D).
> e. Any other classifications in the clerical bargaining unit listed in Exhibit F which have wage progressions which are

identical to those listed in a. through d. above.

f. Any other office or clerical classification to which the Company and Union mutually agree.

The system be easy to use and understand.

Information regarding the system be available to all parties, including individual employees.

All parties be encouraged to participate including employees whose jobs are subject to evaluation.

Job evaluations are to be based on the job and not on the employee who holds the job.

The system meet equal employment requirements.

There be an appeals process.

C. INTENT OF THE PARTIES

During the negotiations the parties discussed what the Union believed was an improper use of a job evaluation system. The Union was of the opinion that under the previous clerical job evaluation system, the Company frequently reassigned more valuable duties from higher level classifications to lower level classifications for the sole purpose of systematically downgrading a large number of higher level positions. The Union believed that this was an improper use of a job evaluation system, and strongly voiced their belief that the new clerical position evaluation system should not be used in that manner.

While the Company did not agree with Union's assessment of the manner in which the Company used the previous job evaluation system, the parties did agree in principle that the use of the new system to alter work assignments for the purpose of widespread, systematic downgrading of jobs would be an inappropriate use of the system.

The Committee recognized that reorganization of work will occur if the Company is to be competitive. The Committee also recognized that technology is changing how clerical work is performed and that those changes will impact the value of some duties. The new system was developed to easily incorporate those types of changes.

In summary, the parties agree that the Company retains its management right as provided for in Section 24.1 of the Clerical Agreement. The understanding of the parties is that the system should not be used to manipulate job assignments for the purpose of systematically downgrading large numbers of positions on a widespread basis.

CHAPTER II

OVERVIEW OF THE PG&E/IBEW

CLERICAL POSITION EVALUATION SYSTEM

CHAPTER II - OVERVIEW OF THE PG&E/IBEW CLERICAL POSITION EVALUATION SYSTEM

A. GENERAL OVERVIEW

The purpose of this chapter is to provide the analyst with a general overview and conceptual understanding of the components and administration of the PG&E/IBEW Clerical Position Evaluation System. The information in this chapter will assist the analyst in understanding the detailed information which follows in Chapters III and IV.

The Clerical Position Evaluation System has been designed to support a skill-based moditied point-factor position evaluation system. Skill-based systems compare the relative degrees of knowledge and skills in a group of positions to determine the value of a specific position. If a knowledge or skill is required to perform a position responsibility, then that knowledge or skill is recognized and valued in the system.

A modified point-factor position evaluation system was developed to support skill-based classifications. Point-factor job evaluation systems compare job responsibilities to a set of compensable factors, such as knowledge and judgment to determine the relative value of the job. Most job evaluation systems compare the "whole" job to the compensable factors. The Clerical Position Evaluation System compares each of the individual duties which comprise a position to a set of agreed to compensable factors. The values of all the duties in a position are then used to determine the total value of the position.

By evaluating individual clerical duties, an analyst can more accurately determine the knowledge and skills required to satisfactorily perform the duties assigned to a position. Most positions involve a number of duties which require a range of knowledge and skills. Some duties in a position may be relatively simple and routine, while others may require more extensive training or experience, the ability to analyze problems, or deal with controversy. Since knowledge and skill varies between duties, an analyst can recognize the full range of knowledge and skill which comprise a whole position by evaluating each individual duty.

B. THE EMPLOYEES COMPLETES THE PEQ

The Clerical Position Evaluation System begins with the description by the employee of each duty assigned to the position on a Position Evaluation Questionnaire (PEQ). The employee then indicates his/her perception of the relative degree of the compensable factors in each duty. The duties are ranked in order of importance by the employee.

Benchmark Duty Statements which describe commonly performed work in each line of progression have been developed and evaluated by the Company and Union for each line of progression. When describing a position's duties, the employee's first step is to review the list of Benchmark Duty Statements to identify Benchmark Duty Statements which match the employee's responsibilities. If a Benchmark Duty Statement has not been developed for a specific duty, then the employee will write a new duty statement (which will be identified as a nonbenchmark duty statement) that accurately describes the duty. The employee then ranks the duties in order of importance.

C. THE SUPERVISOR REVIEWS THE PEQ

The PEQ is then reviewed by the employee's supervisor to ensure that the position's duties are completely and accurately described and correctly ranked. When the supervisor identifies an area which appears to require an addition or modification, the supervisor will review the information with the employee and attempt to obtain employee agreement on any changes. If an agreement is not reached, the supervisor will indicate his or her comments on the PEQ and the analyst will review both the employee's and supervisor's input.

D. THE ANALYST REVIEWS AND EVALUATES THE POSITION

The completed description is then reviewed by the analyst. The analyst begins by reviewing the PEQ to identify any questions about the position. The major purpose of this review is to verify that the position's duties are completely and accurately described and correctly ranked. The Benchmark Duty Statements have already been evaluated and point values have been calculated for each of them. The analyst then determines the point value for any Benchmark Duty Statements which are among the position's duties utilizing a Benchmark Valuation Grid that has been established by the Committee. The analyst evaluates the remaining nonbenchmark duty statements to determine their degree of compensable factors by comparing their knowledge and skill requirements to the definitions for the compensable factors and to the evaluations of similar Benchmark Duties on each compensable factor and then utilizes a Nonbenchmark Valuation Grid that has been established by the Committee. The combined value of all duties, benchmark and nonbenchmark, is then used to determine the total value of the position, as expressed by position evaluation points. The total number of possible points has been divided into four ranges which represent the four clerical classification levels that are subject to position evaluation. The total position evaluation points assigned to the position will fall into one of these four ranges which will determine the classification assigned to the position.

CHAPTER III

COMPONENTS OF THE CLERICAL POSITION EVALUATION SYSTEM

CHAPTER III - COMPONENTS OF THE CLERICAL POSITION EVALUATION SYSTEM

The purpose of this chapter is to describe the various components which make up the PG&E/IBEW Clerical Position Evaluation System including the Position Evaluation Questionnaire, Benchmark Duty Statements, Compensable Factors, Benchmark Duty Valuation Grids, Nonbenchmark Duty Valuation Grid, and Classification Point Guide.

A. POSITION EVALUATION QUESTIONNAIRE

The joint Company/Union Committee developed the Position Evaluation Questionnaire (PEQ) as the chief data gathering instrument. Several versions of this document were used during the development of the job evaluation system. The one now provided for use has been designed so that information necessary to grade a position is available on a single document. In large part, the layout of the PEQ is designed specifically so that the employee who must complete the PEQ can see their duties while describing their recommended compensable factor skill levels for each duty. To the extent possible, the same is true for the supervisor who must review the employee completed PEQ. A copy of the final questionnaire as adopted by the Committee can be found in the Appendix.

Instructions on how to complete the PEQ precede each section of the questionnaire so that it may be completed without additional instructions and with little additional information. In order to complete the PEQ, the employee and supervisor must have copies of the Benchmark Duty Statement List, the Action Word List, and the Sample PEQ. In addition, the Company and Union Committee developed a Users Manual for employees and supervisors which contains more specific instructions and details on each section of the PEQ. Although not required, it is recommended that employees and supervisors review this Manual prior to completing a PEQ. For the information of the analyst, a copy of the Users Manual is included as Chapter V of this Administrative Guide.

The objective of the PEQ is to gather accurate and complete information about the duties assigned to the position. It also provides input regarding the employee's and supervisor's opinion on the level of each compensable factor required to satisfactorily perform the duty. It is important to note that the PEQ is intended to describe the position and not the person in the position.

The PEQ is the major, but not the only, source of information about the duties assigned to a position. The purpose of each section of the PEQ is described below.

General Information - Page 1

This section is used to record information about the employee who completes the PEQ. This information may be useful to the analyst when reviewing duties for the position. The analyst should particularly note such things as whether the questionnaire was prepared by an employee in his/her regular position or one on a temporary upgrade. Identifying the Section or Unit may also be helpful in determining if duties listed are appropriate.

Section I - Page 1

This section provides some basic information about the type of equipment used to perform the position's duties. It also allows the analyst to make some preliminary determinations about such things as typing skills required, personal computer or other terminal usage, computations, etc.

Section II - Page 2

This section provides summary information about the responsibilities of the position and is useful in developing a basic understanding of the position. If properly stated, the analyst should be able to identify the major function of the position and for what responsibilities the position is held accountable.

Section III - Page 2

This section is the incumbent's description of the duties assigned to the position. A maximum of ten duties may be described and those duties must be listed in order of importance. Importance of a duty is determined by the duty's relative importance to the successful completion of the position's overall responsibilities as compared to the position's other duties. Stated another way, a duty's order should be directly related to the position's degree of accountability for satisfactory performance of the duty relative to other duties assigned to the position. Order of importance is not related to the amount of time spent performing a certain duty nor is it related to the point value of each of the individual duties assigned to the position.

It is important that duties and not tasks are listed in Section III. For example, an Operating Clerk who processes local order billings may be required to forward a processed invoice to General Office for payment and then file copies of documents related to the processed invoice. When listing duties, this employee should cite the Benchmark Duty Statement for processing local order invoices but should not cite as a nonbenchmark duty forwarding and filing processed invoices, as these are tasks associated with the duty.

Incidental duties, that is duties which are not regualarly assigned to the position, should not be listed or evaluated. This includes miscellaneous tasks which may be performed by clerical employees in-between their regular duties (e.g. fill-in work) and duties which may be occasionally assigned. If a duty is regularly assigned, it should be evaluated.

This section is the most critical section completed by the employee. Completeness, accuracy and proper format are essential for the analyst to understand the duties assigned to the position. Again, it is important to distinguish between the position and the person.

Sections IV and V - Pages 3 and 5

These sections provide information to the analyst regarding the employee's and supervisor's opinion of the level of difficulty for each compensable factor appropriate for each duty. This information must be carefully reviewed by the analyst, particularly when nonbenchmark duty statements are cited. The analyst should attempt to ascertain if the employee/supervisor recommended levels are consistent with the definition of that factor level and with the levels established for comparable Benchmark Duty Statements. The analyst may modify the employee/supervisor recommended levels of the compensable factors as described in Chapter IV.

Section VI - Page 5

This section allows the incumbent to provide any additional information about the position which has not been described previously. Appropriate citations in this section may include such things as "special projects" that are non-specific to the extent that establishing a profile is impossible. "Special projects" are defined as non-repetitive assignments, generally of relatively short term (one week or less). In no case would a Benchmark Duty Statement be cited as a "special project".

This section may also include duties performed on a very infrequent basis. However, duties which are regularly assigned (excluding incidental duties) to the position and are performed on a periodic basis (daily, weekly, monthly, etc.) should be listed in Section III.

The analyst should review Section VI to determine if any duties were inappropriately omitted from Section III. Duties which are regularly assigned to the position should be listed in Section III and evaluated by the analyst. If an employee listed more than 10 duties on the PEQ (included in Section III and Sections VI), the analyst should review all listed duties to determine which are the 10 most important duties.

Supervisor Comments

This section is provided to document comments from the position's supervisor after reviewing the employee prepared questionnaire. Supervisors should be made aware that their review is critically important to the data collection process. The attention given to this review by the supervisor should be equal to the attention required of the employee. Specific instructions about how the supervisor is to comment on each section completed by the employee are provided.

This section provides the analyst with additional information from the position's supervisor. This information may supplement the information provided by the incumbent. It may raise issues for investigation by the analyst so that the duties of the position may be accurately evaluated.

B. BENCHMARK DUTY STATEMENTS

The Benchmark Duty Statements accurately describe specific duties which are commonly performed in each separate line of progression. Benchmark Duty Statement Lists are included in the Appendix.

Benchmark Duty Statements and accompanying profiles have been developed by the Company/Union Committee to provide a consistent and equitable basis for evaluating clerical positions. The Benchmark Duty Statements were developed from PEQ's collected from over 800 clerical positions. These PEQ's were thoroughly analyzed by the Company/Union Committee and Benchmark Duty Statements were then written by the Committee. These duty statements for each line of progression were then evaluated on the compensable factors. The result of each evaluation is the duty's "profile", that is, the overall evaluation of the duty on each of the compensable factors. As a check to verify that duties in each line of progression were valued equitably, the Company/Union Committee reviewed the profiles of comparable duties in each line of progression, ensuring that comparable duties were similarly written and profiled.

A model was used to develop the Benchmark Duty Statements so that work would be consistently and accurately described. This model is described below:

- Begin with an action word which describes the basic activity. A list of action words is attached for your reference in the Appendix.

- Describe what is done and towards whom or what the activity is directed toward.

- State the purpose of the duty and/or give an example.

- Do not use form numbers or abbreviations that are not widely understood.

- Capture the major function of the duty; it is not necessary to describe all tasks associated with the duty.

- Statement should be precise but should also be brief. ("Process various reports for department" is brief but does not contain sufficient specific detail to identify the work being performed.)

The number of Benchmark Duty Statements varies between the three lines of progression. In the Customer Services and Operating lines of progression, similar duties are performed by positions at various headquarters throughout the system. Since there are a substantial number of similar duties, most duties have been described by the Benchmark Duty Statements. In the Accounting line of progression, duties tend to be more unique and position-specific because duties vary substantially from one function to another. In order to ensure that an adequate representation of Accounting duties were described, separate benchmarks were developed for the Accounting sections, and a far greater number of Benchmark Duty Statements were developed for the Accounting line of progression than for Operating or Customer Services.

C. NONBENCHMARK DUTY STATEMENTS

Although the three system surveys were extensive and the final Benchmark

Duty Statement List contains over 750 statements, the Committee recognizes that some duties exist that were not captured, simply because the survey did not include an employee performing those duties. When the Position Evaluation System is put into regular use, it is expected that some employees will need to list duties that are not included on the Benchmark Duty Statement Lists. In those cases, the employee will have to prepare a new, monbenchmark duty statement. Those statements must be prepared using the same model as that used for the Benchmark Duty Statements.

From time to time after the Position Evaluation System is put into use, the Company and Union will meet to review nonbenchmark duties to determine if they should be converted to Benchmark Duty Statements. Additionally, as Benchmark Duties change, the Company and Union may review Benchmark Duty Statements to determine if their profiles remain accurate or if they should continue as Benchmark Duties. It is the parties' intent that Benchmark Duty Statements continue to accurately describe work that is commonly performed in each line of progression. The Benchmark Duty Statement List cannot be modified except by agreement between Company and Union. This issue is descussed in greater detail in Chapter VIII.

Benchmark Duty Statements have established factor level profiles. Profiles for nonbenchmark duty statements must be established each time one is cited on a PEQ. The analyst should utilize Benchmark Duty Statements for comparisons when checking and establishing profiles for nonbenchmark duty statements.

D. COMPENSABLE FACTORS

The Clerical Position Evaluation System is based on eight compensable factors. A clear understanding of each of these factors and the definitions of the various levels of each factor is essential for proper evaluation of a position. Each of the factors and the levels of each factor are reviewed below.

KNOWLEDGE

The Knowledge factor measures the relative scope and depth of knowledge normally required to satisfactorily perform the duty. Duties which require (1) knowledge of a greater range of rules, procedures or operations and (2) greater training and experience to perform will be assigned to progressively higher levels of the knowledge factor.

Factor Levels:

A. Knowledge of simple, routine, or repetitive tasks or operations typically following step-by-step instructions and requiring little or no previous training or experience.

B. Knowledge of basic or commonly used rules, procedures, or operations which typically require some previous training or experience.

C. Knowledge of standardized rules, procedures, or operations requiring considerable training and experience to perform a full range of standard clerical assignments and resolve recurring problems.

D. Knowledge of extensive body of rules, procedures or operations requiring extended training and experience to perform a variety of interrelated or complex procedural assignments and resolve a range of problems.

COMPUTING

The Computing factor measures the level of mathematical skill normally required to perform the duty. Many duties may not require computing skill and will grade at the lowest level. Duties which require multiple calculations in order to achieve the result (e.g. addition, subtraction, then multiplication) will grade at the highest level.

Factor Levels:

A. Mathematics not typically required.

B. Compute using addition, subtraction, multiplication, and/or division.

C. Compute using multiple mathematical functions such as proration.

JUDGMENT

The Judgment factor measures the relative level of judgment used by the position to perform the duty. The type of instructions received is used to measure judgment. Instructions may be provided verbally, in writing, or through policies or procedures. As less specific instructions are provided to the position while performing the duty, the duty will grade progressively higher on the judgment factor.

Factor Levels:

A. Perform work according to clearly specified instructions.

B. Follow general instructions by selecting and applying standard methods and procedures.

C. Apply judgment in the interpretation of changing instructions or where standard methods and procedures are not available.

ANALYSIS

The Analysis factor measures the level of skill needed to compile, compare and analyze data in order to satisfactorily perform the duty. As the data analyzed becomes more varied, as it comes from a greater number of sources and is used to support problem solving and/or decision-making, the duty will grade progressively higher.

Factor Levels:

A. Comparing, compiling, interpreting and analyzing data not typically required.

B. Compare data to discover similarities and differences.

C. Compile or put together information collected from a number of sources and compare this data to discover similarities and differences.

D. Interpret and analyze data to support problem solving and/or decision making.

WRITING

The Writing factor measures the level of skill needed to prepare correspondence or other written material in order to satisfactorily perform the duty. Normally, rote recording of information such as logging, posting, and transcribing written information will evaluate at level A of this factor. When employees engage in these types of activities as part of the process of preparing a form letter, the duty will normally evaluate at level B. Correspondence refers to written information prepared by the incumbent and forwarded elsewhere for use by others.

Factor Levels:

A. Written correspondence not typically required.

B. Prepare or use appropriate form letter in correspondence, e.g., energy cost inquiry, credit related notification, inter-office memo.

C. Compose draft letters for nonroutine correspondence.

ORAL COMMUNICATION

This factor measures the level of skill needed to verbally communicate with others in order to satisfactorily perform the duty. As duties require greater skills to tactfully persuade others, the duties will grade progressively higher on this factor. Higher levels of diplomacy and tact are usually associated with difficult customer or vendor situations in which a hostile relationship is likely to exist. However, there are instances when oral communication with other company employees can rise to the highest level.

Factor Levels:

A. Oral communication not typically required.

B. Communicate basic information on routine matters.

C. Advise and/or suggest solutions to problems requiring some degree of diplomacy and tact.

D. Advise and persuade on matters requiring a high degree of diplomacy and tact.

LEAD RESPONSIBILITY

Lead responsibility measures the degree to which a duty requires an employee to manage the work of other employees. Lead positions are usually formally designated although some positions function as informal leads.

Factor Levels:

A. Lead responsibility not required.

B. Required to advise on work and answer questions for clerk(s) within and/or below your classification and are held responsible for the work of others.

C. Required to assign or delegate, monitor and advise on work and answer questions for clerk(s) within and/or below your classification and are held responsible for the work of others.

TRAINING

This factor measures the overall extent to which a position is responsible for training others. Unlike other compensable factors, training is not based on the training responsibility associated with a specific duty. Rather, it is based on the level of responsibility for training others which is required to satisfactorily perform the whole position.

Factor Levels:

A. Train others to relieve or replace you; or cross-train others in your position; and/or occasionally train others within your classification.

B. Train others on a regular basis in your work group, unit, section, and/or department to perform duties other than those assigned to your position.

C. Train others continually because you are partly responsible for their performance.

E. BENCHMARK DUTY VALUATION GRID

The Benchmark Duty Valuation Grid is used to determine the value of a benchmark duty. As duties are ranked progressively lower in importance, their relative values decrease. To determine the value for a benchmark duty, the analyst should identify the correct Benchmark Identification Number in the left column. Then the analyst should verify the total number of duties in the position and locate the appropriate group in the Duty Total row on the top of the grid. The analyst should then identify the duty's rank within this group in the Duty Number row. For example, duty number 4 out of 9 total duties. By reading to the right of the Benchmark Identification Number and down from the Duty Number, the analyst will find the correct duty value at the intersection.

In the attached sample grid, the following process would be used. Benchmark Identification Number 9012 is assigned to the position. It is the third duty of eight total duties. Locate 9012 in the Benchmark Identification Number column. Then locate the group for eight duties in the Duty Total row. Look beneath this group for the third duty out of eight. Read down this column until it intersects with the row of values assigned to 9012. The correct value for this duty is 44 points.

A complete set of Benchmark Duty Valuation Grids for the lines of progression that fall in the analyst's area of responsibility will be provided under separate cover. These grids are highly confidential and are not to be shared with <u>any other</u> employees outside of those in the Human Resources departments who are <u>directly responsible</u> for evaluating clerical positions. They should not be shared with any outside parties including Management, IBEW Shop Stewards or Business Representatives.

INSERT A COPY OF THE <u>SAMPLE</u> BENCHMARK DUTY VALUATION GRID HERE.

THIS WILL BE PAGE NUMBER 3-18.

F. NONBENCHMARK DUTY VALUATION GRID

The Nonbenchmark Duty Valuation Grid is used to determine the values of nonbenchmark duties after their profiles have been determined by the analyst. The Nonbenchmark Duty Valuation Grid allows the analyst to determine the duties values by the duties' levels on the compensable factors and their relative ranking out of the total number of duties.

Specific instructions on the use of the Nonbenchmark Duty Valuation Grid are on the grid which is provided under separate cover. Review these instructions before proceeding.

Here is an example of how a nonbenchmark duty would be evaluated. The analyst has reviewed the duty and determined that the following profile is appropriate.

Compensable Factor	Level
Knowledge	C
Computing	B
Judgment	B
Analysis	C
Writing	A
Oral Communication	B
Lead Responsibility	A

The analyst has determined that the position has a total of five duties and this duty is ranked second out of the five duties. Locate the Duty Total for five duties in the top row and the column for the second Duty Number directly beneath this group. Working down this column, identify the appropriate point value for each compensable factor based on the duty's profile and add the constant value in the last row to determine the total points. The following points are fictitous and are only used for example.

Compensable Factor	Points
Knowledge	40
Computing	12
Judgment	12
Analysis	25
Writing	0
Oral Communication	15
Lead Responsibility	0
Constant	21
Total	125

Based on the duty's profile and the duty's rank out of the total number of duties assigned to the position, this nonbenchmark duty is valued at 125 points.

G. CLASSIFICATION POINT GUIDE

The Classification Point Guide is to be used to determine the evaluated classification level. It establishes the cut-off point ranges that separate the four classification levels of clerical employees who are subject to position evaluation.

The Classification Point Guide is to be established pursuant to a Letter of Agreement between Company and Union. It will be developed following completion of the System Study and establishment of final cut-off points. A copy of the Letter of Agreement is included in the Appendix.

CHAPTER IV

THE POSITION EVALUATION SYSTEM IN USE

CHAPTER IV - THE POSITION EVALUATION SYSTEM IN USE

This chapter is designed to provide detailed information regarding the use of the PG&E/IBEW Clerical Position Evaluation System. Since this chapter builds upon the information presented in Chapters I, II and III, a working knowledge of this information is necessary in order to properly administer the system.

A. WHEN IS EVALUATION APPROPRIATE?

Clerical positions may periodically be evaluated during a "system" study. System studies are typically accomplished every three-to-five years to ensure consistency throughout the organization.

Clerical positions within an office or section should be reevaluated whenever significant reorganization or redistribution of duties affecting clerical positions occurs. When this occurs, all affected clerical positions should be reevaluated to determine if the changes in duties warrant a change in classification for any positions.

Clerical positions which are newly established should be evaluated before they are filled on a regular basis.

Individual clerical positions should be reevaluated whenever there are significant changes in assigned position duties. To avoid overloading the system with position evaluations each time minor changes are made to positions, the analyst must use discretion in determining if changes are significant enough to warrant reevaluation. In many cases where duty changes have occurred, the analyst may make a quick evaluation using an existing Position Evaluation Questionnaire (PEQ) and updating the PEQ to reflect the changes in position duties. In these cases, the analyst may obtain verbal or written information about the duty changes from the employee or supervisor. However, in cases in which major duty changes have occurred, a new Position Evaluation Questionnaire should be completed.

It is difficult to absolutely define what constitutes a "significant" change in duties. In some cases it will be obvious that the change in duties is significant enough to require a complete reevaluation of the position. However, in other cases, a duty or several duties may be added or deleted from a position without impacting the classification of the position. On the other hand, the addition or deletion of a single significant duty may affect the classification of a given position. This will most likely happen in cases in which the employee has few position duties and a low point duty is replaced by a high point duty or vice versa.

The significance of the change and the determination of whether to reevaluate the position will depend to some extent on what duties are added and/or deleted. If benchmark duties are added or deleted, this determination may be simpler than when nonbenchmark duties are added or deleted. Additionally, the analyst should note that when changes occur, there is a greater possibility of a dispute over the duties or their ranking between the employee and supervisor and a greater possibility of the incumbent filing a classification grievance if the position is not reevaluated.

B. COLLECTING INFORMATION ABOUT THE POSITION

The Position Evaluation Questionnaire was developed as the chief data gathering instrument for the Clerical Position Evaluation System. The PEQ was designed so that information necessary to evaluate a position is available on a single document. However, information may be collected about the position through the PEQ and from interviews with the incumbent, supervisor or other individuals knowledgable about the position's duties. This information should be augmented by the knowledge of the analyst.

Administering the Position Evaluation Questionnaire

Effective administration of the PEQ contributes greatly to the proper evaluation of positions.

The PEQ has been designed as a "stand-alone" document that, used in conjunction with the Benchmark Duty Statement List, Action Word List and sample PEQ, can be completed independently on an individual basis. To assist employees and supervisors, a Users Manual has been developed. A copy of the Users Manual is included in this Guide in Chapter V. The Benchmark Duty Statement List, Action Word List and a sample PEQ are appendices to this manual. Although it is not necessary for employees and supervisors to review the Users Manual in order to complete the PEQ, it is strongly recommended. In order to complete the PEQ, however, each employee and supervisor must be provided with the Benchmark Duty Statement List and sample PEQ for their line of progression or function, and an Action Word List.

Although the PEQ can be completed independently, based on experience gained during the development of the system, the Committee <u>strongly</u> recommends the following approach to PEQ administration:

- Distribute blank PEQ's to employees and supervisors several days before the PEQ is to be completed. Early distribution stimulates the employees and supervisors to begin thinking about the position's duties. When sending the PEQ, advise the employee and supervisor that a Users Manual is available to assist them in figuring out how to identify duties and complete the PEQ.

- Administer the PEQ in a group setting. This allows the PEQ administrator to discuss the completion process, review the PEQ format, and answer questions in an efficient and time effective manner. Experience has shown that employees completed PEQ's quickly and accurately in group settings. Group administration is particularly useful for system studies and when a number of positions in an organization are being evaluated.

- Provide the employee with a quiet place to complete the PEQ away from the distractions of regular work areas.

The Committee recognizes that there may be unusual circumstances that interfere with the early distribution of the PEQ, administration in group settings, and allowing the employee a quiet place away from the work area for the PEQ completion process. Based upon its experience, the Committee recognizes that the quality of data received from the employee on the PEQ will be reflected in advance notification, instructions, and a proper atmosphere in which to complete the PEQ.

C. THE PEQ COMPLETION PROCESS

The PEQ should be completed by the incumbent for each position being evaluated. If the incumbent is absent at the time of administration of the PEQ, another employee may be selected to complete it, if there is an employee who has 6 months experience performing the duties assigned to the position of the absent employee. This may mean using an employee in the same or higher classification as the absent employee or an employee in a lower classification who has been upgraded to the higher classification and assigned to perform the same duties as those of the absent employee.

In the event the incumbent is unavailable and no other employee has sufficient experience to complete the PEQ or the position is vacant at the time of evaluation, the supervisor of the position may complete the PEQ and forward it to the analyst for evaluation. Except when the incumbent will be unavailable for 2 weeks or less, the absence of an employee will not delay the implementation of evaluation results. When the incumbent returns, he/she will review the supervisor completed PEQ. If there is no disagreement about the content, the incumbent will sign the PEQ. If there is disagreement between the incumbent and supervisor, a new PEQ must be completed and forwarded to the analyst.

Completion of the PEQ is a job responsibility of all clerical employees. Some employees may feel that completion is unnecessary. These employees should be advised of the purpose of the PEQ and that they are required to complete the PEQ as part of their general responsibilities as an employee. By refusing to complete the PEQ, the employee accepts that the evaluation will be based on supervisor input.

Once the employee has completed the PEQ, the supervisor over the position should review all recorded information. Section VI of the questionnaire is specifically provided for the supervisor's comments. As is stated in the

Supervisor Comments Section of the PEQ, when the supervisor believes some information recorded by the employee requires modification, these areas are to be reviewed with the employee. If the employee and supervisor agree after that review, the PEQ is to be modified in the employee information section as appropriate and is to be initialled by both the employee and the supervisor. If no agreement is reached after that discussion, the supervisor should document his or her comments as specified in the Supervisor Comments Section. It is unnecessary for the supervisor and employee to agree on everything on the PEQ, although resolution of differences should be encouraged. The analyst will consider both the employee and supervisor PEQ input as well as other relevant information prior to making evaluation decisions.

Neither the supervisor or employee should improperly coerce each other to change the questionnaire input, since it is not the intent of the parties to create an adversarial relationship between supervisors and employees. Both employees and supervisors should understand that the purpose of the questionnaire is simply to gather the best information possible about the position. The parties recognize that in some cases neither the employee or supervisor will be able to accurately or completely describe the duties of a position. However, it is important that the analyst have the opinions of both the employee and the supervisor when evaluating a position as this information usually serves as the basis for analysis of the position.

D. VERIFYING INFORMATION ABOUT THE POSITION

One of the analyst's primary responsibilities is to determine the actual duties assigned to the position as described in this Section. The actual process used to determine the duties assigned will vary depending upon the issues identified by the analyst. Despite the best efforts of employees and supervisors to provide complete and accurate PEQs, incorrect Benchmark Duty Statements may be identified as part of the position and nonbenchmark duties may not be accurately described. The analyst should verify that the position is responsible for the duties described in the PEQ so that the position is evaluated on its actual responsibilities. Generally, the employee and supervisor who completed the questionnaire are the best source for clarification.

The analyst should also verify that duties are being described and not individual tasks which comprise a duty. Duties typically involve a number of specific tasks which are required to complete the duty. The lowest element of a position description is a task. A task is a detailed statement of an action that is performed. A duty is a broader statement of the action which includes the context or purpose and may be composed of many tasks. Tasks are often steps in a process or activity which result in a larger overall product or result. While they may be included in a duty statement to clarify the duty, inclusion of several tasks within a duty statement is generally not necessary or recommended. Since the Clerical Position Evaluation System is not designed to evaluate tasks, the analyst should carefully review duties described by the incumbent and supervisor, particularly nonbenchmark duties, to ensure that they are not tasks. Inclusion of tasks or incidental duties as evaluated duties may impact the value of the job and result in an inappropriate classification being assigned to the position. Tasks or incidental duties which are not regularly assigned should not be listed or evaluated.

There are a number of opportunities for error in providing input to the evaluation process based on the employee's statement of duties and associated skills and the supervisor's review. The analyst assigned to the task of data gathering and/or evaluation of the positions should be thoroughly familiar with the kind of errors that can occur and what must be done to correct such errors, or prevent such errors from occuring in the first place. If the employee didn't understand the instructions or did not follow them precisely, some of the following errors may be found:

- Too many duties are stated, making evaluation difficult.
- Too few duties are listed, missing the substance of the job.
- Tasks are included, forcing the analyst to combine them into duties.
- Too much detail is included in the summary to be useful.
- Duties are poorly described, and the analyst cannot understand what is done.
- Abbreviations are used that are not common or understood.
- Too much or too little detail is contained in the nonbenchmark duty statements, making translation difficult or impossible.
- Duty Statements are not complete, do not start with an action word or do not follow standardized sentence structure.
- Knowledge and skill levels are overstated or understated.
- Knowledge and skills are indicated for more than one level of duty.
- Definition of lead responsibility is misinterpreted.
- Definition of training is misinterpreted.
- Writing is illegible.

If the supervisor did not adequately review the the employee's input and allowed some of the above errors to slip through, it will make evaluation of the position inaccurate, difficult or impossible without further investigation. The problems this creates may lead to some of the following conditions:

- The purpose of the position is unclear.
- The employee is given credit for duties the supervisor didn't assign.
- The nonbenchmark duty statements are unclear.
- Incidental duties or conditions of employment are included.
- Skill levels are misapplied.
- Acountabilities remain unclear to the employee.
- Disagreements with the employee's input are not resolved and initialed.

In order to verify the information received from the employee and supervisor on the questionnaire, the analyst may use a number of methods. The first step is a review of the PEQ. The analyst should review Section I and II, which describe the equipment used by the position and which summarize the responsibilities and purpose of the position. This information should be compared to the duties listed in Section III. The analyst should also review Section VI to determine if duties were inappropriately omitted from Section III. The Supervisor's Comments on each section should also be reviewed. The analyst should also compare the described duties with the compensable factor profiles recommended by the incumbent and supervisor. Some of the issues the analyst should review include:

1) Do the described duties correspond with the purpose of the position?

2) Does the equipment used by the position as described in Section I correspond to the described duties? Does equipment listed seem to apply to duties that are not listed?

3) If the position has lead responsibilities, have all lead

responsibilities been captured in a single duty statement? Does it advise others? Does it assign or delegate work?

4) Does the ranking of the duties seem appropriate given the purpose of the position? Remember that the duties should be ranked by their importance to completion of the position's overall responsibilities. Duties which are most critical to completing the position's primary purpose (those duties for which the employee is most accountable) should be ranked higher than duties which contribute to this purpose but are not as critical.

5) Do the profiles recommended by the employee/supervisor seem appropriate given the overall purpose of the position? Do the profiles fit the described duties? The analyst may rely on knowledge the analyst has gained about comparable positions to determine if the profiles make sense. If the employee/supervisor recommended profile for a Benchmark Duty Statement is significantly different than the established profile, this may be an indication that an incorrect Benchmark Duty Statement has been selected.

By investigating these areas, the analyst may identify a number of potential concerns about the PEQ which should be clarified. Duties may not be described completely or ranked accurately. Employees and/or supervisors may recommend inappropriate profiles because they misunderstood the definition of the compensable factor. If the profiles do not seem to fit the described duty, it may also indicate that the duty has not been completely described or that an incorrect benchmark has been identified.

When a PEQ lists nonbenchmark duty statements that are clearly redundant or describe tasks that should be combined, the analyst should evaluate the duty statements as a single duty and select the most appropriate knowledge and skill levels to associate with it. Conversely, if a nonbenchmark duty statement contains two distinctly different duties, it will be necessary to separate them and make a judgment as to which knowledge and skill levels are appropriate to each. It is imperative for the successful operation of this position evaluation plan that the knowledge and skill levels expressed on the questionnaire be realistic for the level of the duty performed. If the employee and/or supervisor understate or overstate the level of knowledge or skill applied to a particular duty, the analyst must determine the appropriate value of the duty so that it is consistent with the factor level definitions and comparable Benchmark Duty Statements.

During development of the system, the Company/Union Committee observed that employees and supervisors found it easier to write a new duty statement than to review the Benchmark Duty Statement List. Frequently, an employee completing a PEQ actually was assigned a Benchmark Duty but did not cite it. Determining if this has occurred can be difficult. Even though employees and supervisors have been given specific instructions on the proper way to identify benchmark duties and to write nonbenchmark duty statements, experience indicates that both employees and supervisors will frequently find new and innovative ways to describe a duty. The challenge for the analyst is to discover those instances where the employee and/or supervisor have "created a new wheel" when there is already one of "right size".

If these or similar issues have been identified by a review of the PEQ, the analyst may choose several methods to clarify these issues and determine the actual duties assigned to the position. The analyst may compare the

PEQ to PEQ's completed by employees with similar duties and may also compare the position with other positions in the office/unit to gain a greater understanding of how the work performed fits together. One of the analyst's most effective means of verifying information about the position is the position evaluation interview with the employee and supervisor who prepared and reviewed the questioned PEQ. The analyst may choose to interview others who are knowledgeable about the position's work to gain a better understanding of the job and resolve issues identified from the review of the PEQ. Interviews may be conducted in person or over the telephone. When substantial portions of the PEQ require clarification, in-person interviews may provide greater information about the position.

If the employee's input is inarticulate and not adequately clarified by the supervisor, it may be necessary to return the PEQ for revision or rewrite. In such instances the analyst should point out the areas of deficiency and provide detailed instructions on properly filling out the PEQ.

Correct evaluation of a position using this Position Evaluation System is relatively simple when duties and their relative ranking are agreed to by the incumbent, supervisor and analyst and all duties assigned to the position are represented by Benchmark Duty Statements. Problems arise when there is a difference of opinion, whether between the employee and supervisor or by the analyst. As in the case of differences between employees and supervisors where the system encourages discussions in an effort to resolve those differences before evaluation occurs, the analyst should consider discussing differences in order to resolve them, if such discussion potentially will reduce negative reactions from supervisors or employees. If it is the perception of employees and/or supervisors that the analyst may change data recorded on a PEQ without regard to their input, whether or not they agreed to it at the outset, employee or supervisor confidence in the system is likely to be undermined. It is important therefore that the analyst use judgment in determining when interviews are appropriate and who is best able to provide information needed for evaluating the position.

The information needed for the analyst to determine the position's duties will vary from one position to another. In some cases, the PEQ may accurately and completely describe the position's duties and a review of the PEQ will complete the verification process. In other instances, further investigation will be necessary. Sample questions which may be useful in determining the actual duties for which the position is responsible are listed below.

POSITION EVALUATION QUESTIONS

GENERAL

-- What is the purpose of the organization the position is located in?

-- Why is the position being evaluated?

-- If it is a new position, why is it being established?

-- Has the work been reorganized? Has the work of other positions been affected by this reorganization?

-- Are significant changes expected in the position, organization, or work in the near future?

-- What is the position's relationship in the organization? Who does it report to?

-- Does the position have lead responsibilities? What positions does it lead?

DUTIES

-- What is the primary reason for this position?

-- What does the position produce? Examples?

-- What is the position accountable for?

-- Have the duties changed? Who did the work previously?

-- How are the specific duties performed? Describe the process of completing the duty. Be specific.

-- Are parts of the work shared with other positions?

COMPENSABLE FACTOR PROFILES

Specific questions may be asked about the compensable factors. These sample questions focus on the knowledge and skills required to perform each individual duty.

KNOWLEDGE

-- What does the incumbent have to know to perform this duty?

-- How does the incumbent gain this knowledge?

COMPUTING

-- What calculations are performed by the position? Examples?

JUDGMENT

-- What instructions are provided to the position? Are they written or verbal? (Review if possible)

-- Does the employee have latitude to make decisions within general instructions?

-- What type of decisions? How does the position decide what to do?

ANALYSIS

-- Does the position compare data?

-- How does the position gather data? What are the sources?

-- What does the position do with the data? How is it processed or reviewed?

-- What is the data or information used for? How is it applied?

WRITING

-- Does the individual prepare correspondence or other written documents? What are they?

-- Is the correspondence a form letter or document? How is it completed?

-- Does the position compose original written documents? Is this a requirement of the job? Examples?

ORAL COMMUNICATION

-- Who does the position communicate with?

-- What is the nature of these contacts--exchange of information or discussion of controversial information?

-- Does the position have to convince or persuade others? To what degree?

-- What are some examples of communication?

LEAD RESPONSIBILITY

-- Does the position advise others on how to perform their work? Examples?

-- Is the position responsible for the work of other positions?

-- What are the consequences to incumbent if the work of others is not performed satisfactorily?

-- Does the position assign or delegate work to other positions?

-- Does the position monitor the work of others for quality? For timeliness? Examples?

TRAINING RESPONSIBILITY

-- Does the position train other positions?

-- What subjects/information are included in the training?

-- Is the position responsible for the performance of the trained employees? To what extent?

E. EVALUATING BENCHMARK DUTIES

If the analyst has verified that a benchmark duty has been appropriately identified by the employee and/or supervisor, it should be evaluated as described in Chapter III, Section E, Benchmark Valuation Grid, on page 3-17. By verifying information about the job, the analyst may also determine that a duty written as a nonbenchmark duty may actually be the same as a Benchmark Duty. In these cases, the analyst should identify the duty as a Benchmark Duty and evaluate it appropriately. If a Benchmark Duty was incorrectly identified by the employee and/or supervisor, the analyst should evaluate it as a nonbenchmark duty. Benchmark Duties may be inappropriately identified by the employee and/or supervisor when the position performs part but not all of the duty or when the position performs additional responsibilities not included in the Benchmark Duty Statement. In these cases, the duty should be evaluated as a nonbenchmark duty although the Benchmark Duty may serve as a reference. The relative ranking of Benchmark and nonbenchmark duties should be determined as described in the Section G, Determining Order of Importance, on page 4-21.

F. EVALUATING NONBENCHMARK DUTIES

If the analyst has determined that a duty statement found on a PEQ is appropriately identified as a nonbenchmark duty statement, it must be evaluated utilizing the Nonbenchmark Duty Valuation Grid.

The analyst should review the profile of the nonbenchmark duty provided by the employee and supervisor. Based on the analyst's knowledge of the duty, the analyst should determine a tentative profile of the duty by comparing the duty to the level definitions of each compensable factor. It is important that the analyst understand the function of the duty described in the nonbenchmark duty statement. While the employee and/or supervisor recommended profile may be inconsistent with the nonbenchmark duty statement, it is not necessarily incorrect. It may well be that the duty statement is poorly written and the employee and/or supervisor recommended profile is correct. In other cases, the duty statement may be correctly written, but the employee/supervisor recommended profile is inappropriate and should be modified by the analyst.

The profiles of nonbenchmark duties should be consistent with those of Benchmark Duties. To ensure that the tentative profile is consistent with the profiles of established Benchmark Duties, the analyst may review the duty's tentative profile with comparable Benchmark Duty Statements. Nonbenchmark duties should be evaluated so that their profiles are consistent with Benchmark Duties. For example, the analyst may review a number of benchmark duties which all profile at knowledge level "C" and compare the knowledge required to satisfactorily perform the nonbenchmark duty. The analyst may also review the Benchmark Duty Statement List, identify several comparable Benchmark Duty Statements and compare the profiles of these duties to the tentative profile of the nonbenchmark duty. When appropriate, a full range of Benchmark Duty Statements should be reviewed so that the full value of each compensable factor level can be compared. Each compensable factor level incorporates a range of duties, and it would be inappropriate to focus the scope of comparisons solely at one end of this range and artificially narrow the scope of comparisons.

The tentative profile of the nonbenchmark duty should be modified when appropriate to maintain consistency and equity with the profiles of comparable Benchmark Duties. Final profiles should be evaluated by the analyst as described in Chapter III, Section F, Nonbenchmark Duty Valuation Grid, on page 3-19. The relative ranking of benchmark and nonbenchmark duties should be determined as described in the following Section, Determining Order of Importance.

G. DETERMINING ORDER OF IMPORTANCE

The parties recognize that the Company has the right to assign work and to determine the relative importance of specific duties. However, such determination of order of importance must be reasonable given the responsibilities which are assigned to the position and must be based only on the actual responsibilities which are assigned to the position. The reasonableness of the analyst determination of order of importance is subject to the Appeals procedure. The key step in determining order of importance is to identify those duties for which the position is held progressively more accountable. The most important duties should be those which are critical to satisfactory performance of the primary function of the position.

Order of importance is not related to the amount of time spent performing a duty. The ranking must relate to the duties assigned to the position, not to the employee currently occupying the position. The rank order of duties assigned to the position would not change if the employee assigned to the position changes, unless the duties assigned to the position change.

Generally, it is expected that a similar mix of duties of a number of positions at several different headquarters will be ranked similarly. Also, it is expected that the higher valued duties generally will be ranked higher than lower value duties associated to the position although this will not always be the case.

Because the rank order affects the overall point value of the duties assigned to a position, a different rank order will result in a different total point value.

When evaluating a position, the analyst may find a difference of opinion between the employee and supervisor about the order of importance of the benchmark and/or nonbenchmark duties assigned to the position. The analyst may find that one or both are wholly or partially wrong or that one or both are wholly or partially correct. Resolving this problem by determining the appropriate order of importance is critical to determining the correct classification of a position.

When evaluating both Benchmark and nonbenchmark duties, the analyst should review the duty ranking provided by the employee and supervisor. In some cases, duties may have been inappropriately ranked and the ranking should be modified by the analyst.

H. DOCUMENTING THE ANALYSIS/EVALUATION AND COMMUNICATING EVALUATION RESULTS

Upon completion of the evalution process for a position, the analyst must document certain information. The information that must be documented includes recording the evaluated Benchmark Duty Statements by their Identification Numbers, evaluated nonbenchmark statements and knowledge/skill profiles, lists showing the established order of importance for the duties assigned to the position, duty points, total points, and the evaluated classification. If nonbenchmark duties are included in the duties assigned to the position, the analyst must document a brief description of the nonbenchmark duty. It need not be written in complete Benchmark Duty Statement form; however, it should contain sufficient information to describe the duty. The analyst must document the final evaluation results.

The analyst should also document enough information about the position to explain the evaluation to others, if necessary. This documentation is for the analyst's use in evaluating the position and in explaining the evaluation. This documentation is not intended for use in the appeals procedure except as a source of information for the analyst in preparing or presenting verbal or written information regarding the evaluation.

After the evaluation has been completed, the evaluated classification will be communicated in writing to the supervisor and incumbent.

In addition, in cases in which the evaluation is not based on the duties and order recommended by the employee, the company will provide the incumbent with a list of the duties in the order of importance as evaluated by the analyst.

When such a list is provided, the list will cite only the Benchmark Duty Identification Number for Benchmark Duty Statements that were evaluated. When a nonbenchmark duty statement is evaluated the list will contain a brief description of the nonbenchmark duty. This description need not be written in complete benchmark duty statement form, however, it should contain sufficient information to describe the duty.

When a clerical classification grievance is filed by the Union and referred to Step 2 of the Clerical Position Evaluation Appeals Procedure, Company shall forward a list of duties for the position in order of importance as evaluated by the analyst to Union. See Chapter VI, Appeals Procedure, for more information.

I. DETERMINING APPROPRIATE CLASSIFICATIONS

The analyst should determine the appropriate classification by comparing the total number of evaluation points assigned to the position to the Classification Point Guide as described in Chapter III, Section G, page 3-21. To determine total duty points, follow these steps:

1) Add the duty points for each evaluated duty.

2) Divide the sum by ten.

3) Add the training points.

The resulting number will be the total number of evaluation points for the position. The Classification Point Guide, when finalized, will contain a minimum to maximum point range for each of the four classifications levels that are subject to position evaluation.

J. IMPLEMENTING EVALUATION RESULTS

Initially, implementation of the evaluation results will be handled somewhat differently than it will be done in the future. As part of the development process of this Position Evaluation System, Company and Union entered into an implementation and Cut-off Point Agreement, in which initial implementation procedures are established. A copy of that agreement may be found in the Appendix of this Administrative Guide.

Implementation beyond that addressed in the above agreement will take place immediately after the evaluation process is complete and the employee and supervisor have been notified as provided in Section H. "Documenting the Analysis/Evaluation and Communicating Evaluation Results" on page 4-24. Implementation shall take place in accordance with the provisions of all Company/Union agreements.

There will be instances in which implementation of the evaluation results will cause a classification change for the position evaluated. In those instances where the current incumbent is at a classification level higher that that at which the position evaluated, the incumbent will be "red circled" as provided in a Letter of Agreement signed by PG&E and Local 1245 on December 1, 1982. A copy of the Letter of Agreement may be found in the Appendix of this Administrative Guide. For the specific provisions related to "red circle" agreement, refer to Section 4, "Employee Placement", in the Letter of Agreement.

There will also be instances where the current incumbent is at a classification level lower than at which the position evaluated. When this occurs, the new, higher level position must be filled in accordance with Title 18 of the Clerical Agreement. Except in those cases where a grievance has been filed and is pending implementation of this Position Evaluation System, during the time necessary to fill the position at the higher level, if the incumbent is required to continue to perform the duties, the incumbent shall be temporarily upgraded to the newly identified appropriate level and shall be entitled to the wage rate of the higher classification. If the incumbent has performed the duties of a position that has been reclassified to a higher classification, that employee is entitled to the higher wage rate 30 days prior to the date that the final determination of the appropriate level was reached, assuming the incumbent performed the duties during that 30 day period. If the incumbent performed the duties for less than 30 days during this period, entitlement to the wage rate of the higher classification shall be limited to the actual number of days the incumbent was assigned to perform the duties of the position. Once the higher classification is filled, the incumbent will be placed pursuant to the provisions of Title 19 of the Clerical Agreement.

K. NOTIFICATIONS TO IBEW

On an annual basis, the Company will provide the Union with information about positions that have been reclassified upward or downward when evaluated using the Position Evaluation System. Information to be provided will include:

Classification prior to evaluation.

Evaluated Classification.

Name and social security number of incumbent at the time of evaluation.

Division, Department, Location and Function.

A representative sample of 50% of the evaluations included in the above group, not to excede 50. This information will include the duties list in the order of importance as evaluated by the analyst, exclusive of evaluations on positions on which grievances have been filed.

CHAPTER V

"USERS MANUAL"

INSTRUCTIONS TO EMPLOYEES AND SUPERVISORS

CHAPTER V - USERS MANUAL - INSTRUCTIONS TO EMPLOYEES AND SUPERVISORS

The Users Manual provides information to help you complete a Position Evaluation Questionnaire (PEQ). This information supplements instructions provided on the PEQ. The Users Manual also includes a sample PEQ, Benchmark Duty Statement List and the Action Word List that are needed to complete a PEQ.

EMPLOYEE PEQ COMPLETION PROCESS

You are required to complete the PEQ so that your position can be evaluated in order to determine your appropriate classification. This must be done as clearly and honestly as possible to ensure that the proper classification is identified. The evaluation is accomplished using the Clerical Position Evaluation System that was jointly developed by PGandE and IBEW, Local 1245.

On occasion you may be asked to complete a PEQ for a position whose duties you have performed for at least 6 months. This may happen when the incumbent is absent for more than two weeks and a PEQ is required.

IDENTIFYING INFORMATION

The top part of the first page of the PEQ asks you to fill in identifying information about yourself and the position for which you are completing the PEQ.

SECTION I

Indicate the equipment regularly used to perform your position's duties. If there is equipment used which is not listed, fill in one of the blank spaces.

SECTION II

Summarize your basic duties. The summary should be no more than a few brief sentences which define the purpose of your position and give the reader a clear overview of what you do. See the sample PEQ for an example.

SECTION III

In Section III you will describe the duties assigned to your position and list them in order of importance. Completion of Section III is a very important step and should be carefully considered before you begin.

A list of Benchmark Duty Statements which describe commonly performed clerical duties is included in Appendix B.

Begin by reviewing the list of Benchmark Duty Statements and only select those that accurately and completely describe duties that are assigned to your position. On a piece of scratch paper, write down the Benchmark Duty Statements and their identifying numbers for those Benchmark Duty Statements which describe your position's duties.

If one or more of the duties assigned to your position are not described in the Benchmark Duty Statement List, you will need to write a new duty statement. A duty statement prepared by an employee and/or supervisor that is not on the Benchmark Duty Statement List is called a nonbenchmark duty statement.

If your position requires any lead responsibility, describe all lead responsibilities in a single duty statement. Select only one Benchmark Duty Statement or write only one nonbenchmark duty statement to describe all lead responsibilities.

Incidental duties (duties which are not regularly assigned to your position) should not be listed on the PEQ. This includes miscellaneous tasks which may be performed by clerical employees in-between their regular duties (e.g. fill-in work, and duties which may be occasionally assigned. If a duty is regularly assigned, it should be listed.

Write nonbenchmark duty statements in the same style as the Benchmark Duty Statements. Begin with (1) an action word, follow with (2) an object (that is what is done on or to something) and conclude with the (3) purpose or an example. A list of action words typically used in describing clerical duties is included in Appendix C.

You must be careful to describe only duties and not individual tasks which are part of a duty. A task is a detailed statement of an action or steps in a process, while a duty may be composed of several tasks. For example:

> An operating clerk who processes local order billings may be required to forward the processed invoice to General Office for payment and file copies of the documents related to the processed invoice.

In this case, forwarding the processed invoices and filing the documents are tasks which are associated with the duty of processing invoices. The Benchmark Duty Statement for processing local order invoices should be listed but not the tasks which are part of the duty.

Write your nonbenchmark duty statements, if any, next to any Benchmark Duty Statements you have listed on the scratch paper. Your final list is limited to ten duty statements or less. This is not to say that you must list ten duties. You may have four or five duties and you should only list those duties actually assigned to your position.

Now, rank your list of Benchmark and/or nonbenchmark duty statements by order of importance. To determine order of importance, identify those duties which are critical to satisfactory performance of the primary function of your position and for which you are held most accountable by your supervisor. Compare your duties' relative importance to each other by considering how important each duty is to successful completion of your position's overall responsibilities. A duty's importance is not related to the amount of time spent performing the duty nor is it related to the order or sequence in which duties are performed.

Once you complete your duty statement list and arrange the duties in order of importance, list the duties in Section III. For Benchmark Duty Statements, write the I.D. Number, and the complete Benchmark Duty Statement. For nonbenchmark duties, write the complete nonbenchmark duty statement.

<u>SECTION IV</u>

The purpose of this section is to identify the level of knowledge and skills that are required to perform the duties listed in Section III.

There are six compensable factors listed in Section IV that are used to measure the degree of skills and knowledge required in each duty. For each compensable factor, the different levels of the factor are defined on the PEQ. First, read the description of each level for each factor. Then, indicate the appropriate knowledge and skill level for each of the factors.

For an example of how Section IV should be completed, look at the sample PEQ in Appendix A. The definitions of the compensable factors are summarized below:

KNOWLEDGE

The Knowledge factor measures the relative scope and depth of knowledge typically required to satisfactorily perform the duty. Duties which require (1) knowledge of a greater range of rules, procedures or operations and (2) greater training and experience to perform will be assigned to progressively higher levels of the knowledge factor.

COMPUTING

The Computing factor measures the level of mathematical skill typically required to perform the duty. Many duties may not require computing skill and will grade at the lowest level. Duties which require multiple calculations in order to achieve the result (e.g. addition, subtraction, then multiplication) will grade at the highest level.

JUDGMENT

This factor measures the relative level of judgment provided to perform a specific duty. The type of instructions received are used to measure judgment. Instructions may be provided verbally, in writing, or through policies or procedures. As less specific instructions are provided to perform the duty, the duty will grade progressively higher on the judgment factor.

ANALYSIS

The Analysis factor measures the level of skill needed to compile, compare and analyze data in order to satisfactorily perform the duty. As the data analyzed becomes more varied, as it comes from a greater number of sources and is used to support problem solving and/or decision making, the duty will grade progressively higher.

WRITING

The Writing factor measures the level of skill needed to prepare correspondence or other written material in order to satisfactorily perform the duty. Normally, rote recording of information such as logging, posting, and transcribing written information will evaluate at level A of this factor. When employees engage in these types of activities as part of the process of preparing a form letter, the duty will normally evaluate at level B. Correspondence refers to written information prepared by the incumbent and forwarded elsewhere for use by others.

ORAL COMMUNICATION

This factor measures the level of skill needed to verbally communicate with others in order to satisfactorily perform the duty. As duties require greater skills to tactfully persuade others, the duties will grade progressively higher on this factor. Higher levels of diplomacy and tact are usually associated with difficult customer or vendor situations in which a hostile relationship is likely to exist. However, there are instances where internal oral communications will rise to the highest level.

SECTION V

The purpose of Section V is to identify the level of lead and training responsibilities necessary to perform the position. Remember that only one duty statement can be assigned lead responsibility.

LEAD RESPONSIBILITY

Lead responsibility measures the degree to which a duty requires an employee to manage the work of other employees. Lead positions are usually formally designated although some positions function as informal leads.

TRAINING

This factor measures the overall extent to which you are responsible for training others. Unlike other compensable factors, training is not based on the training responsibility associated with a specific duty. Rather, it is based on the level of responsibility for training others which is required to satisfactorily perform your whole position.

SECTION VI

Complete this section if there is any additional information about the position which has not been described in Section III. Information appropriate for this section would include special projects and duties performed on a very infrequent basis. Special projects are defined as non-repetitive, short term assignments. Periodic assignments, i.e. daily, weekly, or monthly assignments, that are regularly assigned to your position should be included in your list of duties described in Section III.

SUPERVISOR PEQ COMPLETION PROCESS

The Supervisor's Comments Section provides instruction to the supervisor on how to review the PEQ and to document any comments. This section should be completed only by the supervisor.

You will receive the PEQ after the employee initially completes it. First, read the sections in this manual that explain how the employee should complete the PEQ. Then review each section of the PEQ carefully to ensure that it has been properly completed. Your review is critical to the correct evaluation of the position.

In Section III, the employee has listed the duties that he/she believe describe each duty assigned to the position. Check this list to ensure that each duty listed is completely and accurately described and to ensure that the employee has not forgotten to list one of the position's duties. Review the ordering of duties to ensure that they are properly ranked. On a separate piece of scratch paper or on a copy of the PEQ, note any areas in which you disagree with the employee.

In Section IV, the employee has identified the level of knowledge and skills required to perform each duty. Read the definitions carefully given in this Section, and review the employee's responses. In particular, review the employee's input regarding nonbenchmark statements.

If after reviewing the employee's responses carefully on the PEQ, you have noted any areas of disagreement, talk to the employee to clarify the disagreements. If you and the employee come to an agreement that requires changing the PEQ, the PEQ should be revised. Both you and the employee should initial the changes. If you don't obtain agreement, state your comments regarding each section of the PEQ completed by the employee as specified in the Supervisors Comment Section.

AFTER THE QUESTIONNAIRE IS COMPLETED

The supervisor and the employee should sign and date the completed PEQ. Both may make a copy of the PEQ. The supervisor should forward it to the Human Resources Department for evaluation. After the evaluation is completed, both employee and supervisor will be notified of the results.

If the PEQ is prepared by the supervisor or another employee, a copy will be retained for the incumbent's review when he/she returns. If the employee agrees with the completed PEQ, the employee will sign the PEQ. If the employee and supervisor do not agree, the employee will prepare a new PEQ and the supervisor will review it again.

The employee may not agree with the analyst's evaluation of the position. In that case, the employee has the right of appeal as provided for in Title 9 of the Clerical Agreement.

CHAPTER VI

APPEALS PROCEDURE

CHAPTER VI - APPEALS PROCEDURE

CLERICAL JOB EVALUATION APPEALS PROCESS

Disputes involving the Clerical Position Evaluation System shall be resolved in accordance with the provisions of Title 9 of the Clerical Agreement and this Clerical Position Evaluation Appeals Procedure, as described below.

A. FILING/STEP ONE

The initial step in the adjustment of a grievance shall be a discussion between Union's Shop Steward (or grievant or Business Representative if no Shop Steward is assigned to his/her work area) and the grievant's Supervisor or other management employee of corresponding authority. The purpose of such discussion shall be to reach a satisfactory disposition of the grievance but shall not waive or delay the filing requirement set forth in this Agreement.

Grievances concerning a change of classification, establishment of a new clerical position or the present classification which are not resolved as outlined above will be filed by the Union Business Representative with the Regional/Department Human Resources Manager or designee. Such grievances must be filed within the time limits contained in Section 9.3(a) or Attachment A of the Clerical Agreement

Grievances concerning either the establishment of a new position or change or reclassification of a present position must be grieved within the time limits provided in Title 9 of the Clerical Agreement. Such time limits shall commence running on the date the incumbent is notified in writing of the action complained of for occupied positions and the date of posting of the Job Awards Bulletin for newly established positions.

Immediately following the filing of a timely grievance, it will be referred to the Company's designated Region or Department Clerical Position Analyst and the Union's designated Region or Department Clerical Position Analyst.

B. RESPONSE/STEP TWO

After receipt of the grievance, the Company's Regional/Department Clerical Position Analyst will prepare a response to the grievance and, if not sustained, attach a Position Evaluation Questionnaire and a brief summary of the Company's position which will be forwarded to Union's Analyst within 30 calendar days following the referral of the grievance.

Thereafter, if the response is not a basis for settlement of the grievance, the designated Analysts will endeavor to resolve the dispute by mutual agreement. If they agree, a Memorandum of Disposition will be prepared by the Company Analyst and signed by each Analyst.

If the grievance cannot be settled at this step and either party determines that clarification concerning the work performed by the position in question is necessary, the grievance will be referred to a Local Investigating Committee.

If the grievance cannot be settled at this step and sufficient information about the evaluation of the position is available, the grievance will be referred to the Clerical Position Evaluation Committee.

In any case, if the grievance is not settled or referred to the L.I.C. within 45 calendar days following the receipt of the Company's response by the Union Analyst, the grievance will be referred to the Clerical Position Evaluation Committee.

C. <u>LOCAL INVESTIGATING COMMITTEE/STEP THREE</u>

If the Company and/or Union Position Analysts determines that additional information about duties or order of importance is required to resolve the grievance, the L.I.C. will convene within 30 calendar days of the referral to gather that information.

The L.I.C. will be comprised of the Company Human Resources Manager or designee, the Supervisor, the Union Business Representative, and the Shop Steward. Neither the Region/Departmental Clerical Position Analyst or the Union designated Clerical Position Analyst may be designated as a member of the L.I.C. Except for good cause to the contrary, the grievant shall be permitted to be present during the investigative portion of the L.I.C. meeting. The grievant will not be a party to the disposition of the grievance.

The L.I.C. will gather information about the position's duties and investigate questions posed by the Company and/or Union Position Analyst, and submit their findings in a Joint Statement of Facts to the Company and Union Position Analysts. The L.I.C. will not discuss skill/knowledge profiles. The L.I.C.'s Joint Statement of Facts must be submitted within

45 calendar days of the referral to the L.I.C.

Following receipt of the Joint Statement of Facts, the Company and Union Position Analysts will attempt to resolve the grievance as specified in Step 2 of this procedure. If they are unable to do so within 30 calendar days of the receipt of the Joint Statement of Facts, the grievance will be forwarded to the Clerical Position Evaluation Committee.

D. CLERICAL POSITION EVALUATION COMMITTEE/STEP FOUR

The Committee will be comprised of not more than three members selected by Union's Business Manager and three members selected by Company's Manager of Industrial Relations. The Union Analyst and/or Company Analyst may be designated to act as members or advisors to the Committee.

The Committee will schedule bi-monthly meetings to address any clerical appeals. By mutual agreement, the Committee shall schedule additional meetings to handle a backlog of cases. The Committee shall not meet if no appeals are pending. In the event more than one appeal is pending resolution before the Committee, the Committee will attempt to review all such grievances at a single meeting.

If, following discussions before the Clerical Position Evaluation Committee, the Company or Union wish to have additional information which can only be obtained through field investigation, by mutual agreement a sub-committee of the Clerical Position Evaluation Committee shall be appointed to collect the necessary data. Upon completion of their investigation the sub-committee shall report their findings in writing to the Clerical Position Evaluation Committee for final determination.

The Committee is empowered to resolve any such grievance properly submitted, and such resolution shall be final and binding upon the Company, Union, and the employee involved. If a grievance is settled at the Clerical Position Evaluation Committee step of this procedure, a MOD will be prepared. Only Committee members designated by the Manager of Industrial Relations and the Union's Business Manager are authorized to sign the MOD. The resolution of a grievance at a step below Step Five, while final and Binding, is without prejudice to the position of either party, unless mutually agreed otherwise. By mutual agreement, the Committee may refer a grievance directly to Arbitration, with the agreement of the Chairman and Secretary of the Review Committee.

E. REFERRAL TO REVIEW COMMITTEE/STEP FIVE

In the event that the Committee established herein (CPEC) is unable to resolve a grievance within 60 days after it is received by them, the Committee shall forward such unsettled grievance along with a brief mutually agreed to report citing areas of agreement and disagreement to the Review Committee established pursuant to the provisions of Title 9 of the Clerical Agreement. Grievances referred to the Review Committee in this manner shall be subject of the remaining provisions established for the Review Committee and Arbitration by Title 9 of the Clerical Agreement.

F. GENERAL

If agreement is reached on the disposition of a grievance at any step of this procedure, the grievant will be provided a copy of the settlement within 30 days from the date of settlement as outlined in Section 9.1 of the Clerical Agreement.

By mutual agreement of the Parties, the Manager of Industrial Relations and Union's Business Manager may amend the Clerical Position Evaluation Appeals Procedure.

CHAPTER VII

DEVELOPMENT OF THE CLERICAL POSITION EVALUATION SYSTEM

CHAPTER VII - DEVELOPMENT OF THE CLERICAL POSITION EVALUATION SYSTEM

A. BACKGROUND

The evaluation of clerical bargaining unit positions was an issue of serious disagreement between the Company and Union during the late 1970's. During general negotiations in 1980, the Company and Union agreed to the discontinuance of the Company developed job evaluation system then in use - the Cross-Hatch Job Evaluation System.

Between 1980 and October 1982 the Company and Union each independently developed a job evaluation system and attempted to bargain to select one of the two systems. The parties were unsuccessful and were faced with arbitration in which the Arbitrator would select one system or the other. To avoid arbitration, the Company and Union agreed to jointly select and pay for a Consultant to help develop a job evaluation system. This was formalized in a Letter of Agreement signed in October 1982.

An extensive nation-wide search was conducted to select a consultant. Many candidates submitted proposals and were interviewed by a joint Company/Union Committee. In late 1983, Hamilton and Associates were selected.

B. THE NEGOTIATIONS PROCESS

Development of the new system through negotiations began in early 1984. The Company was represented by a Committee comprised of individuals from Industrial Relations, Compensation, Customer Operations, General Services, and Comptrollers. The Union was represented by an Assistant Business Manager and Shop Stewards representing each of the three lines of progression. This joint Committee worked closely with Hamilton and Associates to develop the new system.

The 1982 Letter of Agreement established guidelines that served as the criteria for the system. Those guidelines were:

The system must be easy to use and understand.

Information regarding the system must be available to all parties, including individual employees.

All parties will be encouraged to participate, including employees whose jobs are subject to evaluation.

Job evaluations are to be based on the job and not the employee who holds the job.

The system must meet equal employment requirements.

There must be an appeals process.

The system will utilize existing classifications and will not be tied to market values since pay rates are negotiated separately.

The system will not be based upon the Cross Hatch system and will not be a job definition system.

The plan must be limited to specified classifications in the Clerical bargaining unit.

At the outset, the consultants provided the Company/Union Committee with basic training concerning job evaluation systems. The training covered the full range of job evaluation systems and focused upon the advantages and disadvantages of the respective systems. Once the training phase was complete, the mechanisms necessary to meet these goals were outlined by the consultants and agreed to by the Committee prior to the beginning of development of the data gathering instrument and identification of the compensable factors. Those goals were:

To develop a data gathering instrument (questionnaire).

Field work that involved testing that instrument, interview of a sample of employees, and observation of the workplace.

The preparation of job descriptions (duty statements) written in a manner agreed to by the Committee.

The development of a job evaluation plan.

Evaluation of sample jobs.

Preparation of a "User's Manual" so the plan could be administered.

Validation of the plan.

Documenting of the entire process for future use and reference.

Early in the negotiations process it was determined that job descriptions in the usual sense were unnecessary and a deterrent to reaching agreement on a job evaluation plan. Therefore, it was decided by the Committee, with the concurrence of the Consultants, that a plan could be developed that would enable the Company to evaluate the individual position questionnaires.

That agreement enabled the Committee to proceed with the development of a questionnaire that contained as compensable factors various levels of knowledge and skill associated with a list of the employee's most important duties. In addition to the knowledge factor, the clerical skills factors identified for evaluation were: (1) computation; (2) analysis; (3) judgment; (4) writing; and (5) oral communication. Two additional compensable factors were added: (1) lead responsibility; and (2) training.

Definitions of these factors were developed by the Committee with the assistance of the consultants.

The first major negotiating step involved the development of a questionnaire. The initial objective was to develop a device to gather information about work performed so that the Committee could intelligently consider various types and styles of job evaluation systems.

The questionnaire format was designed to provide the Committee with information that would be compatible with a variety of different systems.

The Committee developed compensable factors that were also designed for easy modification to suit several systems. The questionnaire format and the compensable factors and factor definitions were developed through an exhaustive bargaining process in which the best features of a number of systems were incorporated into the questionnaire.

This phase of the project was extremely time-consuming since each work on the questionnaire was the subject of bargaining, and issues such as who would participate, the role of supervision, and what factors to include had to be discussed and resolved.

C. PILOT STUDY PHASE I

Once this preliminary questionnaire was developed, including the preliminary compensable factors, the Committee and consultants set out to collect data from incumbent employees to test the questionnaire. The number of employees and the classifications and locations of those employees were determined by the Committee. This step was identified as Pilot Study Phase I.

The first Pilot Study was designed to provide the Committee and Consultant with information concerning the type of work performed by the various classifications and departments that are subject to job evaluation. It also served as the first test of the questionnaire and provided the Committee members with their first exposure to actual job evaluation.

To accomplish this Pilot Study, representative samples of employees were selected from each line of progression. This included approximately 80 employees from the Accounting Department, 70 employees from the Customer Services Department, in six different divisions and 50 Operating Department employees, in six different divisions (this was prior to the reorganization of the 13 divisions into six regions). The questionnaire was completed by all the selected employees. Half of the selected employees were also interviewed by the consultant in the presence of Company and Union Committee members. Employees who completed the questionnaire were provided with a glossary of terms most likely to be used in describing clerical jobs and were provided with a suggested format for producing a duty statement.

Initially it was determined that members of the Company/Union bargaining committee would accompany the Consultant when an interview was being conducted of an employee or supervisor as observers only. However, experience showed it was more effective and less intimidating if the observer participated in the interview process.

Once all questionnaires were completed they were processed by the Consultants into composites of benchmarks for each level, function, location or office size.

The Committee then broke into Sub-Committees to review and edit the work of the consultants. This process succeeded in eliminating redundancies, incidental duties and duties that were expected of every employee. It also separated out lead responsibilities and training which were already valued in the knowledge and skills portion of the questionnaire.

Pilot Study Phase I led to several important revisions to the questionnaire, including changes in compensable factors and modification of the questionnaire format.

Following Committee and Consultant review of the data collected in Pilot Study Phase I, actual development of the Job Evaluation System began.

D. PILOT STUDY PHASE II

The Committee, with the assistance of the Consultants, revised the questionnaire and modified the factors and factor definitions. Utilizing the data gathered in Pilot Study Phase I, the Committee developed initial Benchmark Duty Statements and "skill profiles" identifying the knowledge and skill levels necessary to perform each duty. Upon completion, the Committee moved on to Pilot Study Phase II.

Based on the information gathered in the first study, it was determined that a sample equal to ten percent of the affected clerical population would be required to provide the proper statistical basis to develop a system. Therefore, an additional sample group approximately equal in size to the initial Pilot Study group was administered the questionnaire utilizing tighter administrative controls to ensure proper completion. Company members of the Committee described the project to the participants and provided assistance in completing the questionnaire. Union Committee members also actively participated in the group meetings. Significantly better data was received utilizing this method.

Throughout this period, the Committee and Consultant worked toward the selection of a job evaluation system. Various types of systems were reviewed and gradually eliminated from consideration. Important decisions were made that provided for significant employee/supervisor input and that established the role of the Analyst.

As the Committee evaluated the large amount of information gathered about jobs during the two pilot studies, it became apparent to both Company and Union Committee members that many jobs were currently properly classified. The Committee agreed that proper existing relationships should be maintained to avoid unnecessary disruption of the work force.

Following the evaluation of the Pilot Study data the Consultants proposed a skills based modified point factor evaluation system. After considerable negotiation the parties conditionally agreed to the system.

Briefly, the selected system is based upon eight compensable factors: knowledge, computing, analysis, written communication, lead responsibility, judgment, oral communication, and training. To meet the Company/Union objective of maintaining good existing relationships between positions and to minimize disruption of the work force, factor values were determined based upon existing job values. This was accomplished by performing an analysis of variance using the Pilot Study data to explain how positions were currently valued. The system utilizes Benchmark Duty Statements as reference points. The knowledge/skill profiles for each Benchmark were established by the Committee. Duty Statements were not in any way tied to specific classification, and therefore did not constitute job definitions. Further information about the system is available in Section II.

Following Pilot Study Phase II, revised and updated lists of Benchmark Duty Statements were developed adding the new employee and supervisor input to those developed as part of Pilot Study Phase I. This activity was essential to anchor and value the system. The pilot studies yielded over 2,500 duty statements with accompanying skill and knowledge profiles. These statements were again evaluated by Company/Union Sub-committees representing each of the three lines of progression. Single benchmark lists were developed for the Operating Clerical line of progression and for the Customer Services line of progression. Benchmark lists were developed for seven Accounting functions.

Each duty statement was reviewed by the Sub-committee and, where they believed necessary, rewritten and/or reprofiled or eliminated. Many of the statements that employees and supervisors submitted as duty statements were actually tasks associated with other duties performed by the employees and were therefore eliminated. In other instances, the Sub-committee determined that a statement submitted was a duplicate of an established Benchmark Duty Statement. These duplications were eliminated and combined with the previously established Benchmark Duty Statement.

The Accounting Sub-committee met with each section supervisor and a number of unit supervisors and bargaining unit employees to review the data received during Pilot study Phase II and develop their Benchmark Duty Statement lists. Ultimately, the Sub-committees substantially reduced the number of statements.

An important issue under consideration during this process was the impact of office size on position evaluation. The Customer Services and Operating Clerical Sub-committees carefully reviewed the duty statements and skill/knowledge values on the basis of office size to determine if separate benchmark lists should be developed based on office size. Significant differences were not discovered so a single benchmark list was developed for each.

Another important issue was the role of the Analyst, the Supervisor, and the employee in the actual evaluation process. During this phase of the position evaluation system development, it became apparent that considerable judgment had to be applied in interpreting employee/supervisor input. In the process of reviewing the approximately 2,500 statements generated by the two pilot study phases, the Sub-committees in effect acted as the analyst and in fact exercised considerable judgment in revising statements and profiles, identifying and weeding out tasks, eliminating redundancies, and examining the ranking of duties in the order of importance. This process reinforced the notion that duty statements should be clear enough to be easily understood by employees and supervisor in the departments and sections for which they were developed. It also reinforced the notion that the analyst needs to use considerable judgment when interpreting and evaluating employee and supervisor input to ensure that positions are properly evaluated.

E. THE SYSTEM TEST

The System Test phase of development of the position evaluation system provided the validation of the system. Significant samples from all three lines of progression representing all classifications and departments were selected by the Committee. This survey covered 97 Accounting positions, 261 Customer Services positions from 25 offices, and 86 Operating Clerical positions from 28 offices. The test sample equaled approximately 14% of the incumbent occupied positions in each of the three lines of progression. Questionnaires were administered in group meetings whenever groups of 10 or more could be gathered, in some instances by bringing employees from several headquarters to a single location. At smaller locations, the questionnaire was administered individually. The Consultant traveled to major offices throughout the system to conduct group meetings.

During this test, each participant was provided with a copy of the Benchmark Duty Statements for his/her line of progression. The benchmark duty list included duty statements without skill/knowledge profiles. Participants were instructed to select Benchmark Duty Statements whenever possible and to provide their own skill/knowledge profiles. If no benchmark statement on the list described one or more of the duties performed by the individual, he/she was instructed to write a new duty statement and to provide a skill/knowledge profile.

Following completion of the questionnaires, the Consultant compiled the data into lists showing all employee responses for each line of progression. Each Sub-committee evaluated their lists to fit employee generated duty statements into the previously established Benchmark Duty Statement when appropriate, to establish new Benchmark Duty Statements when appropriate, or to eliminate inappropriate statements that were duplications, redundancies, or tasks. This review was preliminary and skill/knowledge levels were not evaluated.

Following the preliminary Sub-committee review, the data was entered into the Consultant's computer for reformatting and for a preliminary evaluation of the data. The input was consolidated into several different formats for the Committee's use in final benchmarking. One of the formats grouped the benchmark statements selected by the participants with the skill/knowledge profiles for the duty statements that had been established by the Committee during the Pilot Study phase. Other formats combined the benchmark statements from all nine benchmark lists into single lists in alphabetical order and in descending point order so that comparisons between lines of progression could be made.

To perform the preliminary evaluation, the Consultants again solved for the factor values based upon the skill/knowledge values provided by the System Test. The employee/supervisor input was then evaluated using the new factor weights to determine the point value for each duty statement and for the position as a whole. The position values were then evaluated to determine tentative cut-off points between classifications. Since the duty statements and skill/knowledge profiles had not been evaluated by an analyst (or in this case by the Committee, acting as an analyst), the valuation was very "rough" and merely provided the Committee with insight into issues that should be addressed during final benchmarking.

F. FINAL BENCHMARKING AND ADOPTION OF THE SYSTEM

The Benchmark Duty Statements that survived the Sub-committee process were then evaluated to determine appropriate skill/knowledge profiles. These statements with their corresponding skill/knowledge profiles will serve as the reference points for the system.

This process involved evaluating the benchmarks developed during the two Pilot Study phases with the employee/supervisor responses to those benchmarks in the System Test to determine if the original benchmark was properly written and profiled. All new statements written by employees and supervisors during the System Test were evaluated to determine if they should become Benchmark Duty Statements, be eliminated, or simply be considered as valid input for a single employee (for the purpose of grading that employee's position during the test). In effect, the Sub-committees benchmarked the system while evaluating approximately 450 positions.

The seven Accounting benchmark lists required significant editing and consolidation. These lists were the least precise because many variations of work were encountered in the Accounting sections. Since the benchmark lists were less precise, many new duty statements were identified during the System Test, ballooning the benchmark list to as many as 150 duty statements in some sections. These large lists were edited and consolidated; eliminating tasks, duplications, redundancies, etc.

The Accounting benchmarking process was an extremely laborious task. The Sub-committee met with the section supervisors and several unit supervisors from the seven sections to scrub the benchmark lists. This required a line-by-line review of each duty statement, comparing employee/supervisor inputs to determine the proper language and profile for each duty statement. Utilizing this process, the lists were significantly improved and were reduced to a more manageable number of Benchmark Duty Statements.

The Operating Clerical benchmark list was also difficult to develop because the Operating Clerical positions are located in a wide variety of departments and types of offices and are assigned many different combinations of duties. This resulted in the selection of fewer Benchmark Duty Statements by employees and supervisors during the second Pilot Study Phase. Many new statements were submitted by employees and supervisors during the System Test Phase. To scrub the data, the Sub-committee spent considerable time evaluating these new duty statements to consolidate them on the Benchmark Duty Statement list.

Although the total number of employees in the Customer Services Department represents the largest single group of employees subject to job evaluation, development of Benchmark Duty Statements was least difficult in this section, primarily due to the fact that work in this department is more standardized throughout the Company's system. In its review of data, the Sub-committee did examine closely the issue of office size to determine whether there was a difference in typical duties assigned to employees on this basis. No significant difference was discovered. Due to the number of positions surveyed and the volume of data received in the System Study, however, the Sub-committee did establish many new Benchmark Duty Statements for the Customer Services Department.

As a result of the data collected during Pilot Study Phase I and II and the System Test Phase, input was received from more than 800 employees. Over 2,500 duty statements were eventually reviewed by the Committee, resulting in the establishment of approximately 750 Benchmark Duty Statements.

Although data was collected from approximately 25% of all incumbent employees, the Committee recognized that there are potentially many duties existing in the PGandE clerical work force that have not been captured in the list. The system, however, has been developed in such a way that new non-benchmark statements can be submitted by employees on questionnaires and can be easily graded. After the system has been in use for some period of time, the Committee will again meet for the purpose of reviewing non-benchmark duty statements submitted by employees and supervisors. Where the Committee determines necessary and appropriate, new statements will be added to the Benchmark Duty Statement list.

Each of the three Company/Union Sub-committees was responsible for the benchmarking for their line of progression. Upon completion of the Sub-Committee evaluation of Benchmark Duty Statements and their corresponding knowledge/skill profiles, the Benchmark Duty Statements were examined by the entire Company/Union Committee. Duties that were common to more than one line of progression were examined to verify consistency both in how the statement was constructed and in how the statement was profiled. Several instances were found where wording of similar duties were stated differently or were profiled differently. This exercise generated considerable debate between Company/Union members of one Sub-committee with the Company/Union members of another Sub-committee. Eventually, following close examination and discussion of the definitions of the three or four levels of each skill and/or knowledge level of each of the factors and the rules for writing duty statements, the Committee reached agreement on the appropriate way to state the duty and/or how the statement should be profiled.

In summary, the selected system is based upon eight compensable factors: (1) knowledge; (2) computations; (3) analysis; (4) judgment; (5) oral communication; (6) written communication; (7) lead responsibility; and (8) training. To meet the Company/Union objective of maintaining good existing relationships between positions and to minimize disruption to the work force, factor values were determined based upon existing job values. This was accomplished by performing a regression analysis using the data gathered in Pilot Study Phase II to explain how positions were currently valued. A second regression analysis was completed following the Committee review of data collected in the System Test Phase. The system utilized Benchmark Duty Statements as reference points. The skill and knowledge profile for each benchmark was established by the Committee. Duty statements were not in any way tied to specific classifications; therefore, do not constitute job definitions. The result is a system that provides flexibility in terms of work assignment while being adaptable to changes in work due to technological or organizational changes.

The Job Evaluation System was developed in meetings of the full Committee and the consultants. Each discussion concerning its design was agreed to by the Committee. Some of the more important points of agreement were:

The data gathering instrument (questionnaire) to record the employee's input and supervisor's review.

The format and style of the job descriptions (Benchmark Duty Statements).

The kind of evaluation plan that was to be used (a skills-based modified point factor system).

The final design of the evaluation plan.

The evaluation of sample jobs.

Refinement of Benchmark Duty Statements and the knowledge and skill levels required to perform them.

The appeals procedure.

Values of knowledge and skill levels were statistically derived from the questionnaire data rather than arbitrarily assigned by a Committee process.

The process of reaching agreement on these points took considerable time. The questionnaire was reviewed several times; two pilot studies were conducted during which two different groups of employees and supervisor provided input. Finally, a system study phase was conducted to validate the Job Evaluation System. From beginning to end, the entire project took just over three years to complete.

CHAPTER VIII

SYSTEM UPDATING

CHAPTER VIII - SYSTEM UPDATING

A. SYSTEM UPDATING

The Company and Union will meet on an annual basis to discuss necessary revisions to the Benchmark Duty Statement List and other issues of interest related to the workings of the Clerical Position Evaluation System. The first meeting will be held one year from the system study establishment of final cut-off points.

During negotiations, Benchmark Duty Statements Lists were established to serve as anchors for the evaluation of clerical positions. These Benchmark Lists include Benchmark Duty Statements that describe commonly performed work and are easy for employees, supervisors and analysts to understand. The number of Benchmark Duties was was established so that the lists were not too cumbersome to use and too difficult to keep up to date.

Since the Benchmark Duty Statements serve as the anchor for the System, it is important that they be updated to accurately reflect the duties and the Knowledge/Skills profiles required to perform the duties actually assigned to clerical positions. Over a period of time, the way work is performed will change. New duties will be added, while others are eliminated. For the system to properly function, it is necessary to update the Benchmark Duty Statement Lists by adding new Benchmark Duty Statements for recently identified duties and by deleting Benchmarks that are no longer reflective of the work performed.

B. NOTICE AND INFORMATION

During the annual meeting, the Company and Union will discuss proposed changes to the Benchmark Lists. The Company will present to the Union information concerning suggested revisions to the List, not less than two weeks prior to the annual meeting. The information provided will include a list of nonbenchmark duties which have been cited frequently enough to indicate consideration of conversion to Benchmark Duties and a list of Benchmark Duty Statements that Company proposed to delete. When Company proposes deletion of current Benchmark Duties, Company will include with the other information its reasons and justifications for such proposal.

Actual changes to the benchmarks list must be approved by both parties. When new work is added, the Company will evaluate those duties as nonbenchmarks. If the new work lends itself to benchmarking, the Company may propose doing so at the annual meeting.

C. <u>GRADING OF OBSOLETE BENCHMARK DUTIES</u>

When work that has been described as a Benchmark Duty Statement changes so that the Benchmark no longer accurately reflects the work performed, the Company will evaluate the duty as a nonbenchmark. In those cases, the Company will discuss the changes at the annual meeting.

D. <u>FUTURE GUIDELINES</u>

When revising and updating the Benchmark Duty Statement Lists, the parties will continue to use the criteria described above and will make every effort to include only duty statements that are accurate and easy to understand.

E. OTHER ISSUES FOR ANNUAL MEETING

During the annual meeting, either party may introduce other issues of interest related to the Clerical Position Evaluation System. However, the party that wishes to introduce other issues must notify the other party of the issue(s) two weeks prior to the annual meeting. The Company and Union respresentatives present at this annual meeting shall have the authority to modify the Clerical Position Evaluation System in any way that is mutually agreed to.

ACTION WORD LIST

Account: To give a report on; to furnish a justifying analysis or explanation.

Accumulate: To collect; to gather.

Act: To perform a specified function.

Add: To unite or join so as to increase in size, quantity, or scope; to combine; to form a sum.

Adjust: To bring to a more satisfactory state; to bring the parts of something to a true or more effective position.

Advise: To recommend a course of action; to offer an informed opinion based on specialized knowledge.

Allocate: To set apart for a specific purpose.

Alter: To make different without changing into something else.

Amend: To change or modify for the better.

Analyze: To separate into elements and critically examine.

Answer: To speak or write in reply.

Apply: To put to use for a purpose; to employ diligently or with close attention.

Appraise: To give an expert judgment of worth or merit.

Arrange: To prepare for an event; to put in proper order.

Assemble: To collect or gather together in a predetermined order from various sources.

Assign: To specify or designate tasks or duties to be performed by others.

Assist: To help or aid others in the performance of work.

Attend: To be present.

Audit: To examine officially with intent to verify.

Balance: To compute the difference between the debits and credits of an account; to reconcile accounts.

Batch: To assemble into a group for one operation.

Bill: To present a statement of charges.

<u>Calculate:</u> To make a mathematical computation.

<u>Calibrate:</u> To check, standardize or adjust systematically the gradations of a measuring instrument.

<u>Call:</u> To communicate with by telephone; to summon; to announce.

<u>Check:</u> To verify; to compare with a source.

<u>Clear:</u> To gain approval of others; to free from obstruction; to authorize; to get rid of.

<u>Close:</u> To bring to a conclusion; to bar passage; to shut; to suspend or stop operations.

<u>Code:</u> To use symbols (letters or numbers) to represent words.

<u>Collect:</u> To accumulate from a number of sources; assemble.

<u>Communicate:</u> To impart a verbal or written message; to transmit information.

<u>Compare:</u> To examine for the purpose of discovering resemblances or differences.

<u>Compile:</u> To put together information; to collect from other documents.

<u>Complete:</u> To finish; to fully carry out.

<u>Compose:</u> To make by putting parts together; to write (an original letter, report, instructions etc.).

<u>Compute:</u> To determine or calculate mathematically.

<u>Condense:</u> To make more compact.

<u>Conduct:</u> To carry on; to direct the execution of.

<u>Confer:</u> To compare views; to consult.

<u>Consolidate:</u> To bring together.

<u>Construct:</u> To make or form by combining parts.

<u>Contact:</u> To communicate with.

<u>Control:</u> To exercise a dominating influence over; to direct.

<u>Coordinate:</u> To regulate, adjust, or combine the actions of others to attain harmony.

<u>Copy:</u> To duplicate an original.

Correct: To make or set right; to alter or adjust to conform to a standard.

Correspond: To communicate with.

Delegate: To commission another to perform tasks or duties.

Deliver: To set free; to convey; to send to an intended destination.

Demonstrate: To illustrate and explain, especially with examples.

Determine: To resolve; to fix conclusively or authoritatively.

Discuss: To exchange views for the purpose of arriving at a conclusion.

Distribute: To deliver to proper destination.

Elaborate: To work out in detail; to give details.

Elect: To choose or select carefully.

Eliminate: To get rid of; to set aside as unimportant.

Empty: To remove contents.

Enlist: To engage for duty; to secure the support and aid.

Ensure: To make certain.

Enter: To start, begin; to place formally on record.

Establish: To bring into existence.

Estimate: To forecast future requirements.

Evaluate: To determine or fix the value of.

Examine: To inspect closely.

Exchange: To give or take one thing in return for another.

Execute: To put into effect; to carry out.

Expedite: To accelerate the process or progress of.

Explain: To make understandable, clarify; to give the reason for.

Extend: To total columns. (Bookkeeping term)

Facilitate: To make easier.

Feed: To move into a machine or opening in order to be used or processed.

<u>File:</u> To arrange in a methodical manner.

<u>Finalize:</u> To put in finished form.

<u>Find:</u> To come upon by searching or effort.

<u>Follow up:</u> To pursue closely in order to check progress.

<u>Formulate:</u> To develop or devise.

<u>Gather:</u> To collect; to accumulate and place in order.

<u>Grant:</u> To admit as being true, acknowledge; to consent, allow.

<u>Identify:</u> To establish the identity of; to associate with some interest.

<u>Implement:</u> To carry out; to execute a plan or program.

<u>Improve:</u> To make something better.

<u>Inform:</u> To communicate information to.

<u>Initiate:</u> To start; to introduce; to originate.

<u>Input:</u> Something or an amount put in; information put into a data processing system.

<u>Inspect:</u> To examine or determine; to critically analyze for suitability.

<u>Instruct:</u> To teach; to coach; to communicate knowledge; to direct or order.

<u>Integrate:</u> To unify; to make whole by putting all parts or elements together.

<u>Interpret:</u> To give the meaning of; to explain to others.

<u>Inventory:</u> To catalog or to count and list.

<u>Investigate:</u> To observe or study by close examination and systematic inquiry.

<u>Issue:</u> To put forth or to distribute officially.

<u>Keypunch:</u> To punch holes to tapes or cards for data-processing.

<u>List:</u> To enumerate; to enter into a catalog with a selling price.

<u>Locate:</u> To look for and find; to specify or determine the place, position or boundaries of.

<u>Log:</u> To enter into a log (a book in which a record is kept).

<u>Mail:</u> To send by mail.

<u>Maintain:</u> To carry on, continue; to keep in a desirable condition.

<u>Make:</u> To cause to happen to; to cause to exist, occur, or appear; to create; to bring into being.

<u>Manually:</u> To do work by hand.

<u>Match:</u> To cause to correspond.

<u>Microfilm:</u> To create a reproduction on microfilm.

<u>Monitor:</u> To watch, observe; to check for a specific purpose.

<u>Move:</u> To go from one point to another; to begin operating or functioning or working in a usual way.

<u>Notify:</u> To make known.

<u>Nullify:</u> To make of no value or consequence; to cancel out.

<u>Obtain:</u> To acquire or gain possession of.

<u>Omit:</u> To leave out; to disregard.

<u>Operate:</u> To perform an activity or series of activities.

<u>Order:</u> To request to be supplied with; to give a command to; to put into a systematic arrangement.

<u>Originate:</u> To begin; to initiate.

<u>Perform:</u> To fulfill or carry out some action.

<u>Persuade:</u> To move by argument or entreaty to a belief, position or course of action.

<u>Pinpoint:</u> To locate or aim with great precision or accuracy; to cause to stand out conspicuously.

<u>Place:</u> To locate and choose positions for.

<u>Plan:</u> To devise or project the realization or achievement and course of action.

<u>Post:</u> To record information in ledgers or other forms from another source.

<u>Pre-audit:</u> To examine officially with intent to verify.

<u>Prevent:</u> To stop something from occurring; to take advance measures against.

Price: To find the value or worth.

Process: To subject to some special treatment; to handle in accordance with a prescribed procedure.

Procure: To obtain possession of; to bring about.

Prepare: To make ready for a particular purpose.

Produce: To make, bear, or yield something.

Program: To work out a sequence of operations to be performed.

Proofread: To read and mark corrections in printed, typed or written material.

Prorate: To divide, distribute or assess on the basis of proportion.

Provide: To supply what is needed.

Pull: To remove, as in filing.

Question: To interrogate; to inquire.

Receive: To acquire, come into possession of.

Recommend: To advise or counsel a course of action; to offer or suggest for adoption.

Reconcile: To adjust; to restore to harmony; to make congruous.

Reconstruct: To rebuild; to reorganize or re-establish.

Record: To register; to set down in writing.

Reenter: To enter again after correction.

Refer: To send or direct for aid, treatment, information or decision; to direct attention.

Refine: To improve or perfect.

Report: To give an account of; to furnish information or decision; to direct attention.

Represent: To act in the place of or for.

Request: To ask for something.

Research: To inquire specifically, using involved and critical investigations.

Resolve: To clear up; to find an answer to; to reach a decision about; to change by resolution or formal vote.

Respond: To make an answer; to show a favorable reaction.

Retrieve: To regain; to rescue.

Review: To consider; to reexamine.

Revise: To rework in order to correct or improve; to make a new, improved or up-to-date version.

Rewrite: To write over.

Schedule: To plan a timetable; to fix time.

Search: To examine; to probe; to make a thorough examination or investigation of.

Segregate: To isolate from others.

Select: To choose the best suited.

Send: To dispatch by a means of communication; to convey.

Set-up: To make an arrangement.

Simplify: To clarify; to reduce to basic essentials.

Solve: To find a solution for.

Sort: To separate or arrange according to a scheme; to rank by kind class, division, etc.

Specify: To state precisely in detail or to name explicitly.

Stamp: To mark a document with a rubber stamp.

Standardize: To bring into conformity to something established by authority, custom or general consent as a model or criterion.

Survey: To examine as to condition, situation or value.

Synthesize: To compose or combine parts or elements in order to form a whole.

Systematize: To arrange methodically.

Tabulate: To put in table form; to set up columns, rows.

Take: To assume possession of; to grasp; to gain approval of; to undertake or perform.

Test: To examine, observe or evaluate critically.

Total: To add up; to compute.

Train: To teach, demonstrate, or guide others in order to bring up to a predetermined standard.

Transcribe: To transfer data from one form of record to another or from one method of preparation to another, without changing the nature of the date.

Transfer: To carry, remove or shift from one person, place or position.

Transmit: To transfer or send from one person to another.

Translate: To change from one place or position to another.

Transport: To carry from one place to another.

Type: To write using a typewriter; to arrange by categories.

Update: To bring current.

Verify: To confirm or establish authenticity; to substantiate.

Use: To put into action or service.

Write: To set down letters, words, sentences or figures on paper or other suitable material; to author; to draft.

CUT-OFF POINT DETERMINATION AGREEMENT

This Agreement provides a means to determine cut-off points for the clerical job evaluation system. To simplify language, the classifications listed in Letter of Agreement 82-111-PG&E will be described as A, B, C, and D in keeping with the practice of the Committee during negotiations.

In conjunction with establishing initial cut-off points, the Company and Union agree that the mix of employees in each level in relation to the number of employees in each of the other levels shall yield an employee population mix equivalent to that which existed when the consultants most recently examined the validation phase data and extrapolated those results to the system population.

The above formula will only be used to establish the final cut-off points, as provided for in Item 3 below. Once the final cut-off points have been established, future changes to cut-off points will be as a result of Company/Union bargaining. Future gradings will be based solely upon the cut-off points.

Cut-off points will be established as follows:

1. <u>System Study - Data Gathering</u>

   The Company will conduct a System Study of the affected clerical positions for all three lines of progression. Position Evaluation Questionnaires will be completed by the following minimum numbers of employees.

   "A" and "B" level classifications: 95% of all occupied positions.

   "C" and "D" level classifications: 85% of all occupied positions.

   The above percentages will be applied to the affected classifications and levels based on the employee population as it exists on July 1, 1987 for Customer Services and Operating Clerical positions and September 1, 1987 for Accounting positions.

   The occupied positions in each department and the duties being performed by these positions on these dates will constitute the system study population for the purpose of establishing cut-off points, except as provided elsewhere in this agreement.

   Positions that change during the System Study period will not be reevaluated prior to the establishment of final cut-off points unless the changes were designed to minimize disruption as described in Item 2 below. Positions that change during the System Study period will be reevaluated following the establishment of final cut-off points prior to implementation of the System Study results for those positions.

   The PEQ should be completed by the incumbent whenever possible. However, if the incumbent is absent at the time of administration of the PEQ, another employee may be selected to complete it, if there is an employee who has 6 months experience performing the duties assigned to the position of the absent employee. This may mean using an employee in the same or higher classification as the absent employee or an employee in a lower classification who has been upgraded to the higher classification and assigned to perform the same duties as those of the absent employee.

In the event the incumbent is unavailable and no other employee has sufficient experience to complete the PEQ, it will be prepared by the supervisor of the position. In those instances where the questionnaire is prepared by the supervisor, a copy of the completed questionnaire shall be retained by the supervisor. Upon the return of the incumbent, the questionnaire shall be reviewed by the incumbent, If the incumbent agrees that the supervisor prepared questionnaire accurately states the duties of the position and arranges those duties in the proper order of importance, the incumbent shall sign the questionnaire. If the incumbent and supervisor cannot agree, the incumbent shall complete the employee section of the questionnaire. After the returning incumbent completes his/her review of the questionnaire, it shall be forwarded to the analyst for evaluation. If the questionnaire is received prior to the completion of Item 2 below, it will be considered in conjunction with establishing the final cut-off points. Questionnaires prepared by the supervisor that are not replaced by an incumbent employee reviewed questionnaire will be forwarded to the Committee.

Positions which are vacated prior to the establishment of preliminary cut-off points will be removed from the system study population prior to establishing final cut-off points if, to the Company's best knowledge, the position will not be filled in the forseeable future. Positions whose duties are modified as a result of permanent eliminations of A and B positions will be reevaluated based on their modified duties.

A or B level positions which are vacated between the date when preliminary cut-off points are established and three weeks prior to the completion of Item 3 of this agreement will also be removed from the system study population prior to establishing final cut-off points if the duties performed by these positions are being eliminated and will not be performed by other positions.

In identifying locations from which the above percentages shall come, Company agrees that the System Study will include a full range of employees in all classifications from each of the office sizes previously identified by the Committee.

This phase will be completed no later than March 31, 1988. Positions that were not evaluated by March 31, 1988 will be graded no later than June 30, 1988.

2. <u>Preliminary Cut-off Point Determination/Work Reorganization</u>

The preliminary cut-off points shall be based upon the distributions described above. Following completion of the data gathering phase and establishment of the preliminary cut-off points, Company shall provide to Union a list showing all positions evaluated. Such list shall include 1) name of each incumbent; 2) social security number; 3) present classification; 4) projected classification; 5) total points for each position; 6) division; 7) department; 8) location; and 9) function.

The Committee anticipates that some number of positions will be determined to be misclassified. In some cases, reorganization of work and reassignment of duties will help minimize disruption to the work force while reducing costs associated with "red-circling." Following the establishment of preliminary cut-off points, the Company will then identify opportunities to reorganize work prior to setting final cut-off points.

During this phase, the Company will review the impact of the preliminary cut-off points on various positions and make suggestions to management about possible work reorganization, where such reorganization will help minimize disruption. The review is not intended to be extensive or in-depth. Actual decisions to reorganize will be made by management.

The Company will re-evaluate positions that were restructured.

This phase will be completed no later than July 1, 1988.

3. <u>Final Cut-off Point Determination/Union Review</u>

Following reorganization and reevaluation of positions that were restructured pursuant to Item #2 above, Company shall prepare projected final cut-off points. Company shall then provide to Union a list showing all positions evaluated and reevaluated. Such list shall include 1) name of each incumbent; 2) social security number; 3) present classification; 4) projected classification; 5) total points for each position; 6) division; 7) department; 8) location; and 9) function.

The Union will review the information provided by the Company to identify any areas of concern in preparation for Company/Union discussions.

Following the completion of the work reorganization phase and the Union review provided for above, the Committee will establish the final cut-off points utilizing the agreed to formula outlined in this Agreement.

In some cases it may be impossible to establish a cut-off point that will yield the exact agreed to distrubution of employees. In those cases, the cut-off point will be established at the point that provided a distribution closest to the agreed to formula.

This phase will be completed no later than August 12, 1988.

4. <u>Company/Union Discussion</u>

The Committee will meet for six bargaining days not later than September 2, 1988. The parties will discuss issues of mutual interest about the administration of the system and the impact of the cut-off points. Proposals may be introduced suggesting changes to the cut-offs

PACIFIC GAS AND ELECTRIC COMPANY

PG&E 245 MARKET STREET · SAN FRANCISCO, CALIFORNIA 94106 · (415) 781-4211 · TWX 910-372-6587

October 6, 1982

Local Union No. 1245
International Brotherhood of
Electrical Workers, AFL-CIO
P. O. Box 4790
Walnut Creek, California 94596

Attention: Mr. Jack K. McNally, Business Manager

Gentlemen:

At the request of Local 1245, IBEW, the issue of an appropriate Clerical Job Evaluation System for certain classifications covered in the Clerical Agreement has been referred to arbitration in accordance with the settlement of the 1979/1980 negotiations and has been assigned Case No. 108.

Company and Union have agreed that it is in the best interests of the employees involved, and the Company and Union, that a further effort be made to reach a mutual agreement on this matter through the bargaining process. It is, therefore, agreed that the arbitration procedure will be stayed under the following conditions:

1. Consultant

The Company and Union will jointly select and pay the consultation fees of a consultant, who will guide and make recommendations to the Committees representing both parties and attempt to establish a mutually acceptable Clerical Job Evaluation System for PGandE employees in classifications listed in Item 3 below.

2. Validation

Before implementation of any proposed Job Evaluation System, such system will be "validated" by being tested against a substantial number of benchmark jobs to the satisfaction of both parties.

3. Guidelines

The Committees and the consultant shall be guided by the following principles:

- The Job Evaluation System will apply to the following clerical classifications:

a. Senior II level clerical jobs.

b. Senior I level clerical jobs.

c. Service Representatives, Operating Clerks, and Accounting Clerks.

d. Utility Clerks (including Clerk D).

e. Any other classifications in the clerical bargaining unit listed in Exhibit F which have wage progressions which are identical to those listed in a. through d. above.

f. Any other office or clerical classification to which the Company and Union mutually agree.

- The system be easy to use and understand.
- Information regarding the system be available to all parties, including individual employees.
- All parties be encouraged to participate including employees whose jobs are subject to evaluation.
- Job evaluations are to be based on the job and not on the employee who holds the job.
- The system meet equal employment requirements.
- There be an appeals process.

4. Employee Placement

If in the application of the agreed-to Job Evaluation System it is determined that a particular position is to be reclassified downward, the incumbent employee will be red-circled at his/her current rate of pay and be subject to the conditions outlined in Paragraphs A or B below. However, if in the Department and office (Section in V.P. & Comptroller) where the inappropriately classified position has been identified, there are other equivalent positions, the red-circled employee may exchange duties with the least senior employee holding that classification. The junior employee would then assume the red-circled status and be subject to the conditions of Paragraphs A and B below.

After implementation of an agreed-to Job Evaluation System, employees who, as a result of job reevaluation, are assigned a lower classification, will be red-circled at their current rate of pay under the following conditions:

A. Customer Services and Operating Lines of Progression

Once an employee has been red-circled at a rate of pay, he or she will be held at that rate until reassigned to another classification equivalent to or higher than the current rate of pay within the same headquarters or he or she vacates the specific job for any other reason. If, during the time an employee is red-circled and there are prebiddable vacancies within a commutable distance of the present headquarters (30 miles or 45 minutes travel time under ordinary conditions), and the red-circled employee elects not to bid or turns down a job award more than once, such employee will be held at the present rate of pay (excluding general wage increases) until such time as the rate established for their newly assigned classification equals or exceeds the red-circled rate. If two or more red-circled employees turn down the same job award, only the junior employee will be charged with a turndown. A red-circled employee who prebids but is not the successful bidder to an equivalent classification within the area of commutable headquarters will continue to maintain the current rate plus future general wage increases.

B. Accounting Line of Progression

The conditions set forth in A above will apply to red-circled employees in the Comptroller's Department with the understanding that, if a red-circled employee bids to another section to maintain his or her current rate of pay, such employee will have at least six months to become fully qualified. In the event the red-circled employee desires to bid back to his or her former section, the employee will not be subject to the six-month bar established for this Line of Progression by the letter agreement dated April 21, 1982 (82-4-PGE).

5. Arbitration

At any time that either party believes that continuing negotiations will be fruitless, it may, upon written notice to the other party, again start the arbitration proceedings at the point where they stood at the time of the execution of this agreement. However, should the issue be referred back to arbitration, the arbitration date shall be set no earlier than 60 days following an exchange of all relevant information on both proposed systems.

If you are in accord with the foregoing and agree thereto, please so indicate in the space provided below and return one executed copy of this letter to Company.

Yours very truly,

PACIFIC GAS AND ELECTRIC COMPANY

By [signature]
Manager of Industrial Relations

The Union is in accord with the foregoing and it agrees thereto as of the date hereof.

LOCAL UNION NO. 1245, INTERNATIONAL BROTHERHOOD OF ELECTRICAL WORKERS, AFL-CIO

Dec 1, 1982

By Jack McNally
Business Manager