



REVIEW COMMITTEE



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**CASE CLOSED
FILED & LOGGED**

INTERNATIONAL BROTHERHOOD OF
ELECTRICAL WORKERS, AFL-CIO
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SALIM A. TAMIMI, SECRETARY

MARGARET A. SHORT, CHAIRMAN
DECISION
LETTER DECISION
PRE-REVIEW REFERRAL

**Pre-Review Committee No. 14121, 14125, 14126, 14188,
14217, 14228, 14288, 14289, 14369, 14378**
Customer Services: Marysville, Auburn, Santa Rosa, Concord, Antioch
Electric T&D: San Jose
Gas T&R: Cinnabar, Fresno

Linda Matthews
Paula Jean
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Company Members
Local Investigating Committee

Phil Carter
Bill Brill

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Larry Pierce
Lula Washington
Union Members
Local Investigating Committee

Subject of the Grievances

These cases all concern reassignment of work between clerical lines of progression and between bargaining units resulting from the implementation in November 2002 of CorDaptix, the new customer information system replacing CIS (Customer Information System).

Facts of the Cases

14121 – Customer Services – Marysville

The grievant is a Service Rep-Typist and the issue concerns the transfer of certain Streetlight tasks from Customer Services to Operating Clerical. The Support Services supervisor indicated that prior to the implementation of CorDaptix, a system-wide survey was taken to determine which classifications performed this work, streetlight green tags. Survey results showed that in most locations, Operating Clerks performed this work.

Prior to CorDaptix, in Sierra Division this work was assigned at various times to three different classifications: Customer Services Rep, Operating Clerk, and Mapper. Post CorDaptix, this work has been assigned to Operating Clerks system-wide.

14125; 14126; 14288; 14289 – Electric T&D – San Jose

The grievants are Foremen's Clerks and an Asst. Foremen's Clerk.

The work involves the Field Order Repository System (FORS), which is a data base software program that is used in conjunction with CorDaptix to generate and track work. It stores all active tags to be worked within a 7-day window. It does not display any canceled or completed Field Orders or Orders to be worked past the 7-day window. FORS is used for any work that does not go through job scheduling such as: meter sets, gas abandonments, and disconnects.

When a customer receives authorizations from appropriate permitting agencies and calls Service Planning to request a meter set, the customer information and request is entered into CorDaptix, which automatically assigns and schedules the work. The grievants are assigned to print from FORS twice-daily meter set or other tags and put them together with job packages that are given to construction. When the construction job is complete, the Crew Leader enters relevant information on the tag (meter number, date set, type of meter set) and returns it to the Foreman's Clerk/Asst for inputting of the information into CorDaptix. The tags are then sent to Customer Records in Stockton for filing.

Union alleges work was moved from the Clerical bargaining unit to the Physical bargaining unit; that prior to CorDaptix, the entering of completed meter set information was the responsibility of Customer Services Records.

14188 – Gas Transmission and Regulation – San Jose/Cinnabar

The grievant in this case is an Operating Clerk and the issue is the same as in 14125 et al above. The grievant is performing the same functions as the Foreman's Clerk/Asst. perform in the Electric Department, but for such tags as gas meter sets, fumigation shut-off and turn-on, and Scheduled Meter Changes. Specifically, Operating Clerical now performs data re-entry work that was previously performed by Customer Services Records. There are no Foreman's Clerks/Assts in the Gas Department.

14217 - Gas Transmission and Regulation – Fresno

The grievants in this case are various Operating Clerks. This grievance, as does the prior case, challenges the reassignment of re-entry work from Customer Services Records to Operating Clerical. The grievant, in this case, cited the setting up of new ECAT meters, which had previously been done by Sr. Service Reps (Customer Services LOP), also known as Power Billers.

14228 – Customer Services - Auburn

The grievant is a Sr. Service Rep. – Customer Services. Meter Readers enter information into the hand-held EMR (Electronic Meter Reading) device concerning field conditions that need to be corrected. The preparation of field orders to correct these conditions prior to CorDaptix had been performed by the Customer Services LOP (Sr. Meter Readers and Service Reps.) and after by the Operating Clerical LOP. Specifically, this grievance addresses field orders for three-phase and TOU meters (time-of-use).

Single-phase gas and electric meter problems reported through EMR are sent to a Distribution Coordinator in the Gas Field Service/Dispatch organization. Tags for correcting these problems system-wide are generated by a Meter Reader Utility Clerk in Santa Rosa. This process is not being challenged by Union as the single-phase meter correction work has remained in the Customer Services LOP.

14369 – Customer Services/Operating – Santa Rosa

In this case, the grievants are both the Service Representatives and Operating Clerks. The issue is the same as 14217.

CorDaptix is designed so that OM&C is responsible for all work up to the first bill. From the first bill on, the work belongs in Customer Services. One of the major objectives of implementing a new customer information system was to standardize and streamline Company's work processes related to customer requests for service.

14378 – Gas T&R, Support Services – Concord

The grievant is an Operating Clerk in the Gas Department. The issue is the same as in 14188.

Discussion

These grievances all resulted from work process changes driven by the implementation of CorDaptix. Company met periodically with Union throughout 2002 to update Union on progress of CorDaptix. During these meetings, Company shared that there would be changes in work assignments and processes but the detail of the changes would not be fully known until implementation. Some of the problems had to be worked out after implementation.

Initially, transition to and stabilization of the new system created a significant amount of additional work for which Company hired more clerical employees, required overtime, and executed Letters of Agreement R1-03-12 and R2-03-14 to establish additional shifts at the Stockton and Sacramento Credit and Records Centers. Further, there were no lay-offs resulting from these work reassignments.

Company cited Section 24.1 which vests exclusively with management the right "to introduce new or improved procedures." However, Company acknowledges that pursuant to Section 13.5, transfer of work between lines of progression or bargaining units is a mandatory subject of bargaining. Under most circumstances Company bargains changes with Union in advance of the change. With respect to the CorDaptix implementation, all changes were not known in advance. Company made a good faith effort to keep Union informed about the project as is documented in the resumes of meetings with Union beginning in November 2001 and continuing until implementation in November 2002.

As a result, in part of the CorDaptix driven changes to clerical assignments, the parties have undertaken another project. That project is to revise the Position Evaluation System by creating new benchmark duty statements that reflect the various clerical tasks that are assigned to each of the three clerical lines of progression.

Decision

Company and Union have a long history of adapting to changes in the business by adjusting work assignments of various classifications and lines of progression through the negotiation process, and to a certain extent, through the grievance procedure.

To resolve these grievances, the PRC notes that the changes in duties between the Customer Services and Operating Lines of Progression are being addressed in the proper forum through the PEQ process. On this basis, all of the above grievances are closed without adjustment, with the exception noted below.

Grievance numbers 14125, 14126, 14288, and 14289 involve the transfer of work from the Clerical Bargaining Unit to the Physical Bargaining Unit. The PRC obtained a report which indicates that in most locations where there are Foremen's or Asst. Foremen's Clerks, there are also Operating Clerks. In those locations, the FORS work should be assigned to a classification in the Operating Clerical line of progression. A reasonable period of time is allowed to transition this work.

In locations where there are no Operating Clerical employees and the work is currently assigned to a Foreman's Clerk or Assistant Foreman's Clerk then the assignment is to remain with the Foreman's or Asst. Foreman's Clerk. The report indicates this number to be 18 locations out of more than 90. Company, of course, pursuant to Section 24.1 has the right to move the work to a headquarters where there are Operating Clerical employees.

On the basis of the foregoing, these cases are closed. Further, if there are other similar grievances at lower steps in the grievance procedure, they should also be closed on the same basis as these grievances.

Margaret Short

Margaret A. Short, Chairman
Review Committee

10/21/04

Date

Sam Tamimi

Sam Tamimi, Secretary
Review Committee

10/21-04

Date