



## REVIEW COMMITTEE



PACIFIC GAS AND ELECTRIC COMPANY  
LABOR RELATIONS DEPARTMENT  
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INTERNATIONAL BROTHERHOOD OF  
ELECTRICAL WORKERS, AFL-CIO  
LOCAL UNION 1245, I.B.E.W.  
P.O. BOX 2547  
VACAVILLE, CALIFORNIA 94696  
(707) 452-2700

KATHY LEDBETTER, CHAIRPERSON

LLOYD CARGO, SECRETARY

### **Pre - Review Committee Number 25094 Customer Service – Local Office - Woodland**

Lisa Bechtel  
Company Member  
Local Investigating Committee

Keith Hopp  
Union Member  
Local Investigating Committee

#### Subject of the Grievance

This case concerns a Written Reminder issued to a Customer Service Representative (CSR) for failure to follow the Customer Service Offices Employee Conduct Summary and by failure to follow guidelines on reporting shortages.

#### Facts of the Case

In June 2019, a Company investigation determined several violations of the Customer Services Offices Employee Conduct Summary were made by the Grievant. First, the Grievant had made change for \$100 with a co-worker by moving the monies between the workstations. Second, the Grievant determined later that day that she was over and did not accurately report the error to the supervisor. Finally, the investigation found that the Grievant attempted to “force balance” the error by giving part of the overage to a co-worker.

#### Discussion

The Company argued that the policies on the topics of these case are clear. In addition, the Grievant had years of experience in the role and has received a significant amount of training on those policies and appropriate cash handling procedures. Knowingly violating the cash handling policies is a serious offense and has historically resulted in formal discipline.


The Union stated that the Written Reminder was too severe given that the Grievant used a known common practice at the office to move monies, attempted to reconcile her error and then did report the error.

Decision


The parties agreed that the Grievant understood the expectations of cash handling and forced balancing and also agreed that formal discipline is consistently issued when employee knowingly violate these policies.

Based on the above, the Pre-Review Committee agreed that the Written Reminder was appropriate and for just cause. The case should be closed without adjustment.

**For the Company:**

 06/09/2020  
\_\_\_\_\_  
Kathy Ledbetter, Chairperson      Date  
Review Committee

**For the Union:**

 06/09/2020  
\_\_\_\_\_  
Lloyd Cargo, Secretary      Date  
Review Committee