



## REVIEW COMMITTEE



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ROBIN WIX, CHAIRMAN

KIT STICE, SECRETARY

- ☐ DECISION
- ☐ LETTER DECISION
- ☐ PRE-REVIEW REFERRAL

### **Pre-Review Committee Number 22791 Shared Services – Fleet Services – San Francisco**

Claire Iandoli  
Company Member  
Local Investigating Committee

Landis Martilla  
Union Member  
Local Investigating Committee

#### Subject of the Grievance

This case concerns the termination of an Equipment Mechanic for failing to perform and/or record 37 Preventive Maintenance (PM) Inspection checklists as required for regulatory record keeping.

#### Facts of the Case

The grievant was an Equipment Mechanic with 13 years of service. The grievant had an active Oral Reminder in Conduct, a Decision Making Leave (DML), and three active C&Cs in attendance and conduct at the time of his termination.

In preparation for an internal audit, it was discovered that 22 vehicle inspections were input into the Fleet Anywhere (FA) system as being completed however the grievant did not complete the required PM Inspection checklists for the inspections. An additional audit of 160 inspections the grievant entered into the FA system as being completed was conducted for the time period of June 9, 2014 to September 23, 2014. The audit revealed an additional 15 incomplete or missing PM Inspection checklists by the grievant. The grievant attended refresher training for the FA system in September 2013 and June 9, 2014. The requirement to complete and maintain appropriate inspection documentation was reviewed during the June 9<sup>th</sup> training session.

#### Discussion

The Union argued that the process for completing the checklists was unclear at best and therefore the termination was without just cause. The Local Investigating Report (LIC) provides testimony that employees at another garage submitted incomplete checklists and, prior to an audit, were instructed to correct the checklists to ensure they were filled out completely, demonstrating that the requirements to complete the records was not clear. Additionally, the Union argued that the Company failed to clearly communicate the importance of the checklists and the resulting consequences if they were not completed correctly.

The Company argued that the termination was for just cause. The grievant was on an active DML at the time the inspection checklists were discovered as not being completed. The Company argued that the grievant was aware of his responsibility to complete the PM Inspection checklists for Company record keeping as demonstrated by his testimony in the LIC report. The Company further argued that the grievant has been using the FA system for four years and the requirement to complete the PM Inspection checklist is not a new procedure. Furthermore, the grievant attended refresher training as recently as June 9, 2014. The follow-up audit period of the 160 inspections entered as completed by the grievant in the FA system occurred after the June 2014 training.

The Company further argued that the grievant's active Oral Reminder and DML were given for failure to follow direction. The grievant's willful refusal to complete the PM Inspection checklists as required demonstrates his ongoing disregard for following work direction. The Company argued that the 37 incomplete and/or missing checklists are a blatant disregard of PG&E's Garage Standards and Operational procedures as well as a violation of the safety standards required by the California Highway Patrol, Department of Transportation, and Occupational Safety and Health Administration.

#### Decision

The Committee discussed this case at length and reviewed the inspection checklists provided as exhibits to the LIC report. Based on the active DML, the Committee agreed the termination was for just cause. This case is closed without adjustment.

Robin Wix 8/12/2015  
Robin Wix, Chairman Date  
Review Committee

Kit Stice 8/12/2015  
Kit Stice, Secretary Date  
Review Committee