



ESC PG&E Guide for Joint Selection Panels.

Joint Selection Panels in the ESC contract are also commonly called “Interview Committees” or “Interview Panels” or “Advancement Selection Boards”. They are used to fill *some* hourly paid classifications, and *all* monthly paid vacancies (except those filled by an employee already in the classification).

Joint selection panels are one way that ESC and PG&E work together to enhance professionalism and quality in the Technical and Professional workforce. They demonstrate the Union and Company’s commitment to mutual respect, cooperative partnership, and upholding contractual obligations. For the Union, joint panels show our commitment to Professional and Union values, and our recognition of legal obligations to all our members, such as non-discrimination, preservation of notes and records, and transparent personnel processes.

Selection of Panel Members

The panel is composed of two non-union individuals appointed by “Management” (usually the hiring manager) and two ESC-represented employees appointed by “the Union”. In this case, “the Union” means the local ESC Union Representative. However, The Union Rep can delegate this duty to a shop steward. Management may request specific panel members, but the Union Rep (or steward) has sole authority to make the appointments. They may not of course appoint an employee under consideration for the position or promotion. They do not have to be from the same classification, for example ESC has appointed Project Managers to interviews for Engineer positions, ADE’s to interview panels for SNBR, etc. ESC’s guidance is to avoid appointing employees from lower classifications whenever possible – e.g. do not appoint a journey level PM to an interview for a Senior level position.

Developing Interview Questions

Questions should be developed jointly and approved by all panel members.

If a test is to be given to the candidates, it must be developed jointly between the Union and management. This includes the test questions, how they are scored and weighted, how the test will be given, and how the test scores will be used (e.g. a pass/fail screen and the committee uses other criteria to pick the most qualified candidate, or use the test scores for the purpose of ranking candidates).

In general, ESC is in favor of objective tests in order to determine qualifications, however we emphasize that when tests are used in joint selection processes, the tests **MUST** be jointly developed, not developed and administered solely by management.

Under the ESC-PG&E Contract, Joint Selection Panels are used in two types of cases:

Vacancies

- Monthly Jobs (21.15, 21.16, 21.17)
- Hourly Jobs (21.10)

Promotional consideration (when there is no vacancy): 21.11.c “Advancement Selection Board”

PROMOTIONS – 21.11.c
Also called “Advancement Selection Boards” or ASB’s

For promotions under 21.11.c, the job of the panel is to assess each candidate’s qualifications for promotion. There is no ranking of candidates against each other. For each applicant, the panel should determine:

- Do they **meet the minimum qualifications** for the job? Candidates should not be excluded from panel review if there is a question over whether they meet the minimum qualifications. If this is an open question, the panel should review and come to a decision. If they determine the candidate does not meet the minimum qualifications, the candidate should not be interviewed. In cases where minimum qualifications are not clear, the panel should conduct an interview in order to determine if the candidate meets minimum qualifications.
- Do they **exceed** the minimum qualifications for the job?
- Do they deserve to be promoted?
- Will the Company promote them?
- If not, **provide feedback** on the reason(s) the employee was not promoted and what they could do to improve and earn a promotion in the future. This feedback should be provided by a management representative on the panel.
- In case of ties, the Company has final say.

Does the panel need to interview every candidate?

- If all four panel members agree to promote or not promote an individual, they do not need to hold an interview.
- If there is any disagreement over whether or not to interview a candidate, the panel must conduct an interview.

Note: the Company is under no obligation to promote employees through this process. In-person interviews are the default; however if all panel members agree, they can conduct interviews via web-ex or conference call.

ASB’s should not consider PMP ratings. Per RC 938 and the contract coverletter item 5.9: “The Company does not use PMP ratings in making promotion, demotion or discipline decisions. PMP ratings may not be used in reference to ‘current performance’ in 21.18c, ‘satisfactory performance’ in advancement criteria, or any other contractual process.”

VACANCIES

For vacancies, the job of the panel is to select the most qualified applicant for the position.

Sec 21.18 has overall processes for MONTHLY jobs. Note that HOURLY jobs with interviews are not under 21.18. The main difference is that ties in 21.18 (monthly) go to an oversight committee and then management has the final say; in 21.10 (hourly) ties are broken by seniority.

Screening Candidates

- ESC-represented applicants should all come from a bid list. If they want to be considered, they must have a bid on file (before the control date of the job requisition or “req”) AND have uploaded their resume into the system (see 21.1.f).
- All panel members should see the bid list and the resumes,
- If there are too many candidates, the panel screens the list together to decide who to interview. Management - neither HR nor the hiring supervisor/manager - cannot unilaterally screen out any ESC represented applicants if they are on the bid list. The *panel* can screen out ESC-represented applicants, but it needs to be a joint decision.

- ESC-represented applicants who are screened out should be informed that they were screened out.
- If the opening includes external candidates, Management (HR or supervisor or both) can screen out candidates from the external applicant list before bringing the list to the panel.

Alternating Processes for Monthly positions

- For beginning-level monthly jobs (e.g. Associate Engineer), there is an alternating process, and every other opening (on a system-wide level) is filled by interview panel or by Unrestricted Appointment (“URA”). When an opening is URA no joint panel is required, however management may request a panel in an advisory role. The ESC members can provide input, but management will make the decision.
- For journey and higher-level monthly jobs, there are no URA’s and all openings go to joint panels. For most journey and Senior jobs, the interviews alternate between ESC-only and open. ESC-only means that only ESC-represented employees should be considered for interviews.
- For Senior Consulting and Principal level monthly jobs, all openings go to ESC and the first group considered are those in the next lower job in the LOP (e.g. Senior Engineers for a Sr. Consulting opening)
- Panels cannot pool applicants from different rounds. The panel may want to say “we kind of like this applicant from the ESC-only list, but we’d like to consider outside applicants too before making a decision.” That is explicitly prohibited by the contract – the panel must consider all applicants in each round and either select one or reject them all.
- CJBT tracks the alternating processes at the system-wide level. If there is no record of how the last job was done, then it goes to interview panel (for beginning level) or “ESC only” for journey or Senior level openings.
- See the “monthly job bidding cheat sheet” for more information.

21.10 Interviews for Hourly positions

- 21.10 follows section 21.2 in that it uses the same bid priorities – A, B, C, D, etc.
- For candidates in the same bid priority, selection is by interview panel and not by seniority.
- B and D do not get interviewed because they are already in the classification, just changing HQ’s.
- C’s are interviewed against only other C’s, E’s against other E’s, etc.
- Panels cannot pool applicants from different bid priorities. The panel may want to say “we kind of like this C-bidder, but we’d like to consider the E or F bidders too before making a decision.” That is explicitly prohibited by the contract – the panel must consider all applicants in each priority and either select one or reject them all.
- G bidders must be screened by the interview panel. CJBT will provide the list and resumes, and the panel will decide which ones meet the minimum qualifications and which of those to interview.
- For H bidders, it is the Company’s option to consider H bidders - since they are not in ESC, ESC can’t object if the company decides not to consider them, and this is in 21.2(h); however, if Company decides to consider H bidders then that is done by the joint panel as 21.10 says.
- If the list is entirely exhausted - either there are no H bidders, or the Company doesn’t want to consider them, or the panel interviews them and rejects them - then the

Company can go to external hire by Company choice. External candidates still need to meet the minimum requirements of the position. The Company is not required to use joint interview panels for external candidates, but ESC recommends using a joint panel where the ESC members have an advisory role

Conduct of the interviews

Panels should be consistent and ask all applicants the same questions. HR provides guidelines on laws around interviewing candidates – all panel members should review what types of questions cannot be asked. Panel members should take turns asking questions. Interview panels should not consider PMP ratings. Per RC 938 and the contract coverletter item 5.9: “The Company does not use PMP ratings in making promotion, demotion or discipline decisions. PMP ratings may not be used in reference to ‘current performance’ in 21.18c, ‘satisfactory performance’ in advancement criteria, or any other contractual process.”

Selection of successful candidates

Ideally the panel will reach consensus on which applicant to select.

3-4 decision. If not, the panel can decide by a 3/4 vote, although the panel members need to agree to this. For example, if the Management side is a Supervisor and a Manager, then the Manager can pull rank and tell the Supervisor to change their vote; they cannot do this to the Union side members however. If the one person in disagreement is a Union appointee, for monthly jobs they can either agree to be outvoted, or refer the issue to the Oversight Committee (although that committee will probably uphold the 3/4 decision); for hourly jobs, the tie would be broken by seniority.

2-2 tie. If the panel is tied 2-2 Management versus Union, it depends on if the opening is monthly or hourly. For hourly, the more senior applicant must be selected. For monthly, management gets final say, and the Union members can refer to the Oversight Committee if they wish to have the decision reviewed. If the job is monthly and the 2-2 split is one management and one union on each side, then the committee really should work it out among themselves, otherwise they could refer it to the Oversight Committee; it is hard to see how the Oversight Committee will have sufficient information to break the tie in a non-arbitrary way.

Notice to Unsuccessful candidates

The panel – generally a management member – should provide feedback to employees who were interviewed and not selected. Were they well qualified, just someone else was better qualified? Or do they need to improve in order to have a real chance for this job? If so, tell them what they ought to do to get better consideration in the future.

Referral to Oversight Committee

When referring a case to the Oversight Committee, please include the following

- Names and classifications and LAN ID's of all panel members, identify who is management and who is union
- Names of candidates - who was selected and who was not
- Summary of the dispute: which panels support which candidate and why.

Outcome of Hiring Decisions

*** VERY IMPORTANT**

When the panel selects a successful candidate, the panel must decide how much relevant experience the candidate has, for the purpose of future promotion, submit the determination to HR/Recruiting and notify the employee. Evaluation should be documented, dated and signed

by all panel members and notes should be entered in PCR. For example, say the panel is hiring a journey Project Engineer. The minimum requirement for Sr. Project Engineer is eight years of relevant experience. The journey-level hire obviously has some previous experience (or else they would have been hired as Associate level), but it might not all be 100% relevant. There is no set rule for this, but many departments have created formulas in order to be consistent (e.g. two years of Design Engineering experience counts as one year of Project Engineering experience), others estimate the relevant experience on a case-by-case basis. **The main point here is to come up with a number and tell the employee, HR and recruiting so that everyone will know when they will reach the qualification for the next career level.** If panels don't do this at the time of hire, there will be confusion in the future.

What if there is only one candidate?

In this scenario, the panel has three options:

1. Accept the candidate without need for an interview (if they meet the minimum qualifications). This can expedite the placement. The entire panel must agree on this option.
2. Reject the candidate without interview (if they objectively do not meet minimum qualifications). The entire panel must agree on this option.
3. Interview the candidate. This would be either if there is a question over whether they meet the minimum qualifications, or if they meet minimum qualifications but the panel still wants to interview them. The panel may reject an applicant who meets minimum qualifications.

What if no candidates are qualified either before or after determination by committee?

For hourly 21.10 jobs, see the bullet points of 21.10 above. For monthly jobs, if there are no qualified candidates, or the panel rejects all candidates, the Company may then choose to re-post the job, or post it at a lower level and use the appropriate process for that job level. There are no "Unrestricted Appointments" to monthly vacancies, except for Beginning Level monthly vacancies.

"Overqualified candidate" in jobs with automatic progression

There are instances where an employee is selected for a position and they already meet the requirements for a higher classification with automatic advancement (e.g. a candidate accepts an Associate Project Engineer position and already has more than three years of relevant experience). In these cases, the Company and Union have agreed that there should be a 90-day review period to ensure that the employee is performing satisfactorily. If they are, they advance to the higher classification at that time (90 days after reporting).

For more support

For ESC appointees, contact your shop steward or Union Representative.
For Management appointees, contact CJBT or Labor Relations Specialist.

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