

STATE OF CALIFORNIA  
DECISION OF THE  
PUBLIC EMPLOYMENT RELATIONS BOARD



HEALDSBURG AREA TEACHERS ASSOCIATION, )  
CTA/NEA, )

Charging Party, )

v. )

HEALDSBURG UNION HIGH SCHOOL DISTRICT, )

Respondent. )

Case No. SF-CE-869

PERB Decision No. 467

December 20, 1984

Appearances: George A. Cassell for Healdsburg Area Teachers Association, CTA/NEA; Robert J. Henry, Attorney for Healdsburg Union High School District.

Before Jaeger, Morgenstern and Burt, Members.

DECISION

MORGENSTERN, Member: The Healdsburg Area Teachers Association, CTA/NEA (Association or CTA), appeals the attached dismissal issued by a regional attorney of the Public Employment Relations Board (Board). In its unfair practice charge, the Association alleged that the Healdsburg Union High School District (District) violated section 3543.5(a), (b), (c) and (e) of the Educational Employment Relations Act (EERA)<sup>1</sup> by transferring the duties of the Chapter I coordinator from a certificated to a classified employee.

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<sup>1</sup>EERA is codified at Government Code section 3540 et seq. Unless otherwise indicated, all references are to the Government Code.

## DISCUSSION

In reaching his conclusion that the charge was untimely,<sup>2</sup> the regional attorney found the allegations to reveal that, as of June 8, 1983, the Association had been informed of the District's intent to transfer the work to the classified unit and had taken steps to implement that decision. In contrast, it is the Association's position that the date of implementation of transfer, September 1, 1983, is the date the District committed the alleged unfair practice and, therefore, the charge is timely.

We are in agreement with the regional attorney's conclusion based on the following assessment of the facts. As early as February 23, 1983, nearly one year before the charge was filed, the District announced its intention to transfer the Chapter I coordinator assignment and offered CTA the opportunity only to negotiate the effects of that decision. The board's resolution of March 8th went forward with that course of action and directed that the incumbent be released from the position as of June 30, 1983. Subsequent conduct by the District did nothing to dispel the notion that the decision to transfer was going forward. During the June 10, 1983 negotiating session, the District's position remained that only the ramifications of the decision were negotiable.

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<sup>2</sup>EERA section 3541.5 precludes the issuance of a complaint based on an alleged unfair practice occurring more than six months prior to the filing of the charge.

In sum, the District indicated its intent to unilaterally transfer the Chapter I coordinator duties by issuance of its resolution of March 8, 1983, and clearly advised CTA of its intention not to pursue the matter via a unit determination proceeding at the bargaining session of June 10, 1983. The events which followed do not suggest that the District was reconsidering its decision. Therefore, the unilateral change occurred on June 30, 1983, when the incumbent was relieved of the Chapter I coordinator's duties. Since the unfair practice charge was filed on January 30, 1984, the Board can only look to those events which occurred after July 30, 1983. Within that period, no unfair practice appears in the allegations.

In affirming the dismissal of the charge, we necessarily reject the unit modification theory put forward by our dissenting colleague. The artfully drafted opinion might well have attracted additional supporters had it been based on the facts as they exist in the instant case.

#### ORDER

Based on the foregoing, the unfair practice charge in Case No. SF-CE-869 is DISMISSED WITHOUT LEAVE TO AMEND.

Member Burt joined in this Decision. Member Jaeger's dissent begins on page 4.

Member Jaeger, dissenting: I would find that not only was the charge in this case timely filed, but that it states a prima facie violation of the Act and should proceed to a hearing on the merits.

The majority finds that the unilateral change in this case occurred on June 30, 1983, when the incumbent was removed from the Title I Coordinator position. I find that the employer's unlawful act may be dated from September 1, 1983, the first day that the District removed the classification of Title I Coordinator from the certificated unit and effectively denied the Association the right to represent the employee occupying that position.

Since my view with respect to the timeliness of the charge is dependent upon my reading of the facts alleged in the charge, it is necessary to set forth a brief factual summary.

#### Factual Summary

On February 23, 1983, Assistant Superintendent Lawrence A. Machi sent a letter to the Association negotiator, Mark Giampaoli, stating that the District wanted to negotiate the "transfer of service out of the bargaining unit of Chapter I supervision . . . ."

On March 4, 1983, the District and the Association discussed the issue, but failed to reach agreement.

On March 8, 1983, the District's governing board passed a

formal resolution releasing Gordon Langford from his current administrative position of Title I Coordinator.<sup>1</sup>

On March 22 and, subsequently, on April 1, 1983, the parties negotiated about the issue but failed to reach agreement.

During the April 1 negotiating session, the District proposed that the "Chapter I Coordinator duties be assumed by a management classified employee."

In these bargaining sessions, the Association took the firm position that the Title I Coordinator classification belonged in the certificated unit.

On June 8, 1983, Association negotiator Mark Allen wrote a letter to Assistant Superintendent Machi. That letter states, in pertinent part:

It is my understanding that the issue of Title I Coordinator has not been resolved. As I recall, the District approached the teachers' negotiating team with a proposal for a unit modification removing the Title I Coordinator from our representation. After several negotiation sessions, neither side could come to an agreement as to where the responsibilities of the Coordinator's job lie, either in the administrative or certificated domain. An agreement was reached that the District would pursue this matter through the legal channels by petitioning PERB for a unit modification. In such an action both parties would be able to present their cases before an impartial body.

It has now come to my attention that at a recent meeting Barbara McConnell, a

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<sup>1</sup>In the exhibits attached to the charge and in the charge itself the Association and the District use "Title I Coordinator" and "Chapter I Coordinator" interchangeably.

classified employee, was appointed to replace Gordon Langford, a certificated employee as the Title I Coordinator.

Because the District circumvented the procedures required to make a unit modification and took unilateral action on a matter which had reached impasse at the bargaining table, this act has to be viewed as illegal. . . .

On June 10, 1983, the parties again met to negotiate. The District informed the Association that, contrary to its earlier agreement, it was not required to petition PERB for a unit modification because "the Board of Education had declared the Title I Coordinator position a management position."

At a negotiating session which occurred on August 12, the District refused to reconsider its decision and informed the Association that the matter was left in its hands ". . . to take whatever action is appropriate."

On September 1, 1983, Barbara McConnell, an employee not in the certificated unit, filled the position of Title I Coordinator.

On January 30, the instant unfair practice charge was filed.

#### Discussion

There is a very significant issue presented by this charge which the majority decision sees fit to ignore.

This Board has long held that, prior to making a determination that it will transfer work out of the bargaining unit, an employer must offer the exclusive representative notice and an opportunity to negotiate. Rialto Unified School

District (4/30/82) PERB Decision No. 209; Solano County Community College District (6/30/82) PERB Decision No. 219; Alum Rock Union Elementary School District (6/27/83) PERB Decision No. 322; Goleta Union School District (8/1/84) PERB Decision No. 391.

However, the decision to transfer work or duties out of a bargaining unit is to be distinguished from an attempt to remove an entire classification or position from a bargaining unit because management no longer feels the position is appropriately placed in the unit. Such an action constitutes an attempt to alter the configuration of a bargaining unit. The National Labor Relations Board (NLRB) and the federal courts, in interpreting the National Labor Relations Act (29 U.S.C. 151 et seq.), have long held that the configuration of a unit is a permissive subject of bargaining. That is, while the parties may negotiate over a unit description, it is unlawful for one party to insist to the point of impasse that the unit configuration be modified. Morris, The Developing Labor Law, 2d ed., Chapter 18; Shell Oil Co. (1972) 194 NLRB 988; Electrical Workers (Steinmetz Electrical Contractors Assn., Inc.) (1978) 234 NLRB 633; Salt Valley Water Users' Assn. (1973) 204 NLRB 83 [83 LRRM 1536] enf'd 498 F.2d 394 [86 LRRM 2873]; Canterbury Gardens (1978) 238 NLRB 864 [99 LRRM 1279]; Preterm, Inc. (1979) 240 NLRB 654; A-1 Fire Protection, Inc. (1980) 250 NLRB 217.

I agree with the NLRB and the federal courts that the configuration of a unit is not a mandatory subject of bargaining. Even where the parties negotiate about the issue through completion of the impasse procedure, it would potentially undermine the Board's unit modification procedure<sup>2</sup>

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<sup>2</sup>PERB Regulation 32781 provides, in relevant part:

(b) A recognized or certified employee organization, an employer, or both jointly may file with the regional office a petition for change in unit determination:

(1) To delete classifications or positions no longer in existence or which by virtue of changes in circumstances are no longer appropriate to the established unit;

(2) To update classification titles where the duties are not changed sufficiently to cause deletion from the established unit;

(3) To make technical changes to clarify the unit description;

(4) To clarify the unit where the creation of a new classification or position has created a dispute as to whether the new classification or position is or is not included in the existing unit.

(5) To delete classification(s) or position(s) not subject to (1) above which are not appropriate to the unit because said classification(s) or position(s) are management, supervisory or confidential, provided that:

(A) The petition is filed jointly by the employer and the recognized

if management were to unilaterally implement a change in a unit description which conflicts with established Board precedent delineating the statutory terms "managerial," "supervisory," or "confidential" employee. See EERA sections 3540.1(d), (g), (m); Lompoc Unified School District (3/17/77) EERB Decision No. 13; Campbell Union High School District (8/17/78) PERB Decision No. 66; Franklin-McKinley School District (10/26/79) PERB

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or certified employee organization,  
or

(B) There is not in effect a lawful written agreement or memorandum of understanding, or

(C) The petition is filed during the "window period" of a lawful written agreement or memorandum of understanding as defined in these regulations in Section 33020 for EERA . . . .

(c) All affected recognized or certified employee organizations may jointly file with the regional office a petition to transfer classifications or positions from one represented established unit to another.

(d) A petition to add classifications or positions to an established unit, transfer classifications from one established unit to another, consolidate two or more established units or divide an existing unit into two or more appropriate units shall be dismissed if filed less than 12 months following certification of the results of a representation election covering any employees proposed to be added or affected by the petition to transfer, consolidate or divide.

Decision No. 108; Oakland Unified School District (11/25/81)

PERB Decision No. 182.

In this case, the charge alleges that the position of Title I Coordinator was previously held by members of the certificated unit and that management undertook to remove the classification from the bargaining unit. Indeed, there is even an allegation that the District considered the position to be "managerial." Thus, I would view the charge as properly alleging that the District was attempting to modify the unit description.<sup>3</sup> While the Association could, if it so desired, negotiate concerning the proposed change, it was not obligated to do so and management could not insist that the parties bargain to the point of impasse concerning the issue.

Having so found, I have no difficulty determining that the charge was timely filed. Since the Association was not required to negotiate with the District and the District could

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<sup>3</sup>Article 2.1 of the parties 1981-83 collective bargaining agreement provides that

[t]he Board recognizes the Association as the exclusive representative of all certificated employees of the Board--excluding management, confidential, and supervisory employees, adult education, and substitute teachers as defined in the Act, for the purpose of meeting and negotiating.

Although the agreement was not attached to the charge, the Board may nevertheless take administrative notice of its existence.

not effectuate the change unilaterally without first seeking to modify the unit through the unit modification procedure, I would date the alleged violation as occurring when the District, by filling the position on September 1 with a noncertificated employee, denied the Association the right to represent the employee occupying the Title I Coordinator classification.



## PUBLIC EMPLOYMENT RELATIONS BOARD

San Francisco Regional Office  
177 Post Street, 9th Floor  
San Francisco, California 94108  
(415) 557-1350

March 5, 1984



Ramon E. Romero  
California Teachers Assn.  
1705 Murchison Drive  
P. O. Box 921  
Burlingame, CA 94010

Robert Henry  
Schools Legal Counsel  
410 Fiscal Drive, Room 111-E  
Santa Rosa, CA 95401

Re: REFUSAL TO ISSUE COMPLAINT AND DISMISSAL OF UNFAIR PRACTICE CHARGE  
Healdsburg Area Teachers Association, CTA/NEA v. Healdsburg Union High  
School District, Charge No. SF-CE-869

Dear Parties:

Pursuant to Public Employment Relations Board (PERB) Regulation section 32620(5), a complaint will not be issued in the above-referenced case and the pending charge is hereby dismissed because it fails to allege facts sufficient to state a prima facie violation of the Educational Employment Relations Act (EERA).<sup>1</sup> The reasoning which underlies this decision follows.

On January 30, 1984, the Healdsburg Area Teachers Association, CTA/NEA (Association) filed an unfair practice charge against the Healdsburg Union High School District (District) alleging violation of EERA section 3543.5, subdivisions (a), (b), (c) and (e). Specifically, charging party alleged that the District transferred the duties of the Title I coordinator, a bargaining unit position, out of the unit prior to bargaining such change to impasse or agreement.

To state a prima facie violation, charging party must allege and ultimately establish that the alleged unfair practice either occurred or was discovered within the 6-month period immediately preceding the filing of the charge with PERB. EERA section 3541.5; San Dieguito Union High School District (2/25/82) PERB Decision No. 194.

On February 28, 1984, the regional attorney discussed with charging party's attorney the deficiency of the above-referenced charge. It was pointed out

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<sup>1</sup>References to the EERA are to Government Code sections 3540 et seq. PERB Regulations are codified at California Administrative Code, Title 8.

Ramon E. Romero  
Robert Henry  
March 5, 1984  
Page 2

that charging party has failed to state a prima facie violation of the above-cited EERA sections because the unfair practice charge was filed (January 30, 1984), more than six months subsequent to the date on which charging party first learned of the violation. The unfair practice charge, on its face, reveals that as of June 8, 1983 the Association had been informed that the District intended, and had taken steps to implement its decision, to transfer the duties of Title I Coordinator from Gordon Langford, a member of the certificated unit, to Barbara McConnell, a member of the classified unit.<sup>2</sup> Further, as of that date, that the District had made clear its intention to undertake this transfer unilaterally, prior to reaching impasse or agreement with the Association, and that it would not resort to PERB's unit modification procedures as a means of removing the position from the unit. (See inter alia, paragraphs 9 and 10, as well as Exhibits "A" and "C".)

The Association, according to the allegations in Paragraph 19, threatened on June 10, 1983 to file an unfair practice charge with PERB if the District unilaterally implemented the change. Yet, the Association waited more than seven months before filing such charge. Accordingly, the allegations of the charge are dismissed and no complaint will issue.

Pursuant to Public Employment Relations Board regulation section 32635 (California Administrative Code, title 8, part III), you may appeal the refusal to issue a complaint (dismissal) to the Board itself.

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<sup>2</sup>On June 8, 1983, Mark Allen, president of the Association, wrote to Larry Machi, representative of the District (see Exhibit G, attached to charge), stating:

It has now come to my attention that at a recent meeting Barbara McConnell, a classified employee, was appointed to replace Gordon Langford, a certificated employee, as Title I Coordinator.

Because the district circumvented the procedures required to make a unit modification and took unilateral action in a matter which had [sic] reached impasse at the bargaining table, this act has to be viewed as illegal.

Ramon E. Romero  
Robert Henry  
March 5, 1984  
Page 3

#### Right to Appeal

You may obtain a review of this dismissal of the charge by filing an appeal to the Board itself within twenty (20) calendar days after service of this Notice (section 32635(a)). To be timely filed, the original and five (5) copies of such appeal must be actually received by the Board itself before the close of business (5:00 p.m.) on March 26, 1984, or sent by telegraph or certified United States mail postmarked not later than March 26, 1984 (section 32135). The Board's address is:

Public Employment Relations Board  
1031 18th Street  
Sacramento, CA 95814

If you file a timely appeal of the refusal to issue a complaint, any other party may file with the Board an original and five (5) copies of a statement in opposition within twenty (20) calendar days following the date of service of the appeal (section 32635(b)).

#### Service

All documents authorized to be filed herein must also be "served" upon all parties to the proceeding, and a "proof of service" must accompany the document filed with the Board itself (see section 32140 for the required contents and a sample form). The document will be considered properly "served" when personally delivered or deposited in the first-class mail postage paid and properly addressed.

#### Extension of Time

A request for an extension of time in which to file a document with the Board itself must be in writing and filed with the Board at the previously noted address. A request for an extension must be filed at least three (3) calendar days before the expiration of the time required for filing the document. The request must indicate good cause for and, if known, the position of the other party regarding the extension, and shall be accompanied by proof of service of the request upon each party (section 32132).

Ramon E. Romero  
Robert Henry  
March 5, 1984  
Page 4

Final Date

If no appeal is filed within the specified time limits, the dismissal will become final when the time limits have expired.

Very truly yours,

DENNIS M. SULLIVAN  
General Counsel

By  
PETER HABERFELD  
Regional Attorney

cc: General Counsel