

Conducting a Grievance Meeting Checklist

Preparation

- ✓ Am I technically prepared with a full understanding of the issue at hand?
- ✓ Am I confident in my ability to discuss the issue directly and fully?
- ✓ Have I reviewed the related language for the issue in the contract to fully understand my contractual responsibilities?
- ✓ Have I discussed the matter with Labor Relations? Evaluate:
 - ✓ Is management directly contributing to the issue or problem?
 - ✓ Are there external influences at play? If so, what are they and how can they be addressed?
 - ✓ Are there past practices that I should be aware of and consider?
- ✓ Am I prepared to create the documentation that will be required for this grievance?

Logistics

- ✓ Are there sufficient materials available to document the meeting with notes? Is the meeting scheduled within the contract's mandated time frame?
- ✓ Have I provided timely and appropriate responses to the union's requests for information for this issue?
- ✓ Have I scheduled the meeting room in advance (if required)?
- ✓ Have I released the Union Representative(s) from scheduled duty hours to official time?

Protocol

- ✓ How will the meeting start?
- ✓ Who will attend?
- ✓ What is the meeting agenda?
- ✓ How and when will the meeting end?
- ✓ Will cell (or other) phone calls be allowed during the meeting?
- ✓ Will breaks be allowed during the meeting? If so, when?
- ✓ What constitutes unacceptable behavior?
- ✓ How will such behavior be handled?
- ✓ Who will take notes?
- ✓ What questions will I prepare to help the grievant focus on the issue to avoid distractions?
- ✓ What questions will I prepare to ask the grievant directly what he or she wants?
- ✓ What questions will I prepare to ask the grievant to justify his or her demands?
- ✓ Does the contract support the grievant claim?
- ✓ How will I most effectively summarize my understanding of the issues?
- ✓ What is the time frame in which I must provide a response to this meeting?