

Investigation Checklist

Good investigation at the early stages of a grievance can lay the foundation for your case. Poor or sloppy investigation can harm your case because facts not recorded early tend not to be recorded at all.

Investigate at the first step as if the grievance will go to arbitration. A good investigation will expedite settlement. A good investigation will help build your confidence.

This checklist will assist you in completing a good grievance investigation.

- ___ Interview the grievant. Listen carefully to his/her story.
- ___ Have grievant write his/her rebuttal to discipline (if appropriate).
- ___ Interview grievant's co-workers.
- ___ Interview the witnesses and management, asking the Six W's. Get a written, signed statement from witnesses.
- ___ Keep written records of all interviews.
- ___ Request copy of personnel file (if disciplinary grievance).
- ___ Request any other management records needed (personnel policies, payroll records, seniority list, attendance records, etc.)
- ___ Determine if the problem affects others in the workplace.
- ___ Determine if this is one of the five violations and the remedy desired.
- ___ Determine if filing a grievance is the best strategy for solving the problem.
- ___ Check previous grievance settlements for precedents.
- ___ Check the experience of other stewards in similar cases.
- ___ Seek advice, if needed, from other union representatives.
- ___ Review the case with the grievant.
- ___ Anticipate and prepare for management's arguments.
- ___ Outline your presentation in writing.
- ___ Inform other workers about the issue and organize support activities for the grievance.