



# Stewards

## Grievance 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.

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

- Interview the grievant. Listen carefully to their story.
- Have grievant write his/her rebuttal to discipline (if appropriate).
- Interview grievant's co-workers.
- Interview the witnesses and management, asking the 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 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.