

Before the Meeting

- Review the Collective Agreement and any relevant policy, keep them with you
- Call your Unit Vice President if you have any questions or concerns
- **Take notes whenever you meet with a Member about a potential grievance or workplace issue**
- Have questions prepared if necessary

Before the Meeting – Member Discussion

- Advise the Member to be honest, answer the question, nevertheless they do not have to add information unless it aids in their position/justification
- Agree on a signal (touch forearm, hand signal) that the Member knows to stop talking immediately and/or if you need to call a caucus (break from the meeting to speak privately)
- Manage temperament, being aggressive will most likely escalate the situation

During the Meeting

- Take good notes
- Let Management prove their case, ask them to explain (reasonableness of the decision)
- Take note of any observations/tone/body language if relevant (Manager is hostile/intimidating or Member is remorseful)
- Ask Management to slow down or repeat if necessary

After the Meeting

- Expand on your notes while it is fresh in your mind, if you took short hand or could not write all the details, provide both copies to the Union Office
- Follow up with Unit Vice President if applicable (outstanding issues, something out of the ordinary, etc.)
- Advise the Member of the next steps or review any relevant information (Discipline policy or code of conduct, etc.)

In Front of Management & Note Taking Tips

Note Taking Tips:

- Notes are part of the chain of evidence for various Member issues
- **5 W's:** Where was the meeting? When was the meeting? Who was there? Why was there a meeting? What was the issue?
- Remember someone else is going to read your notes, are they legible and do they make sense, write out abbreviations (full thoughts/story/facts etc.)
- Use the template or ensure you gather all the information noted on the template (date, who is present, etc.)
- **Do not rely** on any template, ask questions and make note to ensure you have the complete picture
- NO white out, scratch it out, white out could appear later as trying to hide something
- Leave white space (additions after meeting)
- Be alert to inconsistencies
- Use "quotes" to signify word for word
- Skip small words during the meeting (is, as, if, the, and, etc.)
- Use initials to identify who is speaking (John Doe = JD), write the initials next to the name when you document full names of who is present
- Take note of any observations/tone/body language if relevant (Manager is hostile/intimidating or Member is remorseful)
- Capture the story, the main points and relevant details
- Keep all original notes **being mindful of confidentiality** (Don't leave a steward note book on your desk in the open)