

# CHECKLIST FOR GRIEVANCE INVESTIGATION

## DISCHARGE AND PENALTIES

- Just cause
- Complete statement of events leading to discipline
- Date and times (important to document)
- Supervisor's name
- Name, address, phone #, and statement of witness (if any)
- Employee's record
- Print or diagram of area (if applicable)

## NOTES ABOUT DISCHARGE OR DISCIPLINE CASES:

- Did the steward ask about grievant's personal problems?
- Did the steward ask about any previous record, good or bad, long or short?
- Did the steward probe any extenuating circumstances in this case?
- Did the steward ask about the personal character of all people involved?
- Did the steward discuss the consequences of the penalty?
- Did the steward consider whether the "punishment fits the crime"?
- Did the steward advise the grievant to seek employment while waiting?

## JOB POSTING

- Grievant's classification and seniority
- Grievant's previous classification
- What grievant was temporarily promoted to
- Date of promotions (if any)
- Pay stubs, if possible
- Grievant's experience in vacancy requested
- Name and seniority of employee awarded job
- Number of posting and grievant's application
- Article violated

## JOB POSTINGS (IMPROPER OR NON-POSTING)

- Classification of vacancy
- Area in which vacancy existed
- Name of employee who held vacancy
- Name of employee promoted to fill vacancy
- Article violated
- Shift at time of posting

## REMOVED FROM POSTING

- Grievant's posted classification
- Date of last posting
- Grievant's qualifications
- Reasons for removal
- Classification assigned to
- Name of employees junior and not affected

## TEMPORARY POSITION

- Grievant's seniority and classification
- Grievant's qualification
- Classification at which promotion was made
- Time of promotion
- Availability of grievant at time of promotion
- Name of supervisor involved
- Name of employee promoted
- Location promotion made
- Instructions to grievant (if any)
- Exact work performed by grievant
- Articles violated

## IMPROPER PAY (WORK ASSIGNMENT)

- Grievant's regular posted classification
- Grievant's regular work assignment
- Grievant's assignment on day in question
- Name of employees who worked in grievant's place (if any)
- Name of employee available (junior to grievant)
- Date of grievant's last posting
- Safety issues (if any)
- Pay rate applicable to assignment
- Exact work performed by grievant
- Articles violated

## DEMOTION

- Grievant's classification and seniority
- Number of employees affected
- Grievant's qualifications
- Classification demoted to
- Names of junior employees holding higher rated jobs (if any)
- Name of employee performing grievant's regular work (if any)
- Articles violated

## OVERTIME

- Grievant's classification
- Shift or work group
- Date and shift overtime was scheduled
- Classification scheduled for overtime
- Name and classification of employee who worked
- Record of overtime from supervisor's records
- The work that was performed
- Articles violated

## CONTRACTUAL HOLIDAY

- Same as overtime
- Seniority of grievant
- Seniority of employees who did work

## VACATIONS

- Seniority of grievant
- Time requested and time allotted
- Grievant's qualification
- Name and classification of junior employees
- Number of employees in work group

## SUPERVISION WORKING

- Name of personnel doing the work
- Type of work performed
- Amount of time worked
- Area where work was done
- Grievant's classification
- Availability of grievant
- Is grievant entitled to the pay

## TRANSFERS

- Seniority of grievant
- Department requested
- Name of new employees
- Grievant's classifications
- Employees available to replace