

# Step 1 Grievance Meeting Preparation

(To be completed by the Steward)

Name of Grievor : \_\_\_\_\_ Date : \_\_\_\_\_

## A. Questions for the Employer

Step 1's are an opportunity to discuss and resolve the issues. Given the summary of facts, prepare a complete list of questions for the employer. For example:

- *Could you explain the Employer's reasoning behind...*
- *Could you tell me why...*
- *What documentation is there to substantiate...*
- *We are curious as to...*

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_

## B. Documents / Evidence Required

Step 1's are an opportunity to formally request necessary documentation which may be essential if moving on to Step 2, for example, letters, policies, memos, interview notes, evaluations, etc. Ask for copies and ensure that your request is documented in the minutes.

- |          |           |
|----------|-----------|
| 1. _____ | 6. _____  |
| 2. _____ | 7. _____  |
| 3. _____ | 8. _____  |
| 4. _____ | 9. _____  |
| 5. _____ | 10. _____ |

### C. Union's Argument / Presentation (Two suggested styles)

**METHOD A:** Root the argument in the collective agreement. Select your key points and supporting Articles. Present the least contentious ones first to build your argument. Use specific evidence and documentation to show how the grievor is complying with the terms of the Collective Agreement or the Employer is not. **Ask the Employer for their rationale or for missing documentation.**

OR

**METHOD B:** If familiar with Pixar Pitch\* please use this format to develop a narrative to create a persuasive argument.

METHOD A	METHOD B
Point 1	Once upon a time
Point 2	Every day
Point 3	One day
Point 4	Because of that
Point 5	Because of that (2)
Point 6	Until finally

\* Taught in Skillful Steward

#### D. Remedy Sought

Prepare your anticipated resolutions. Make sure you have a rationale as to why the resolution is in the best interests of both parties. A well prepared resolution can bring benefits to more than one party. Ensures the grievor knows the entire continuum of possibilities.

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_

#### Notes:

Name of Steward : \_\_\_\_\_ Date : \_\_\_\_\_

*Please print*

If proceeding to Step 2 please send this guide to your LRO

# STEP 1 GRIEVANCE PRESENTATION GUIDE

## A. Introductions

Ensure that everyone in the room is introduced by name and worksite title

## B. Purpose of the meeting, time expectations & meeting plan

Identify the purpose of the meeting, set the tone and clarify your step 1 grievance meeting expectations. For example: "We are here today to talk about Collective Agreement Article...and how it pertains to the circumstances of (name of grievor) ". "When we booked the meeting, I asked for a full hour. Do we have that time?" "I have an initial presentation of 5 -10 minutes after which there will be an opportunity for questions and a discussion." Get agreement.

## C. Articles in dispute

Review the articles on dispute as listed on the grievance form. See D & E.

## D. Summary of facts

Establish the facts by using a chronology of dates to develop an outline. Incorporate the who, what, when and where details. Cite the collective agreement article when appropriate.

In discipline cases, the Employer would be expected to speak first because of the principle of natural justice. The Union and the grievor have the right to know the exact charges and the Employer's evidence to support the charges before being asked to participate in a discussion.

## E. Union's Argument / Presentation (Two methods)

**Method A:** Root the argument in the collective agreement. Select your key points. Present the least contentious ones first to build your argument. Use specific evidence & documentation to show how the grievor is complying with the terms of the Collective Agreement, or how the Employer is not. Prepare yourself for anticipated Employer replies.

**Method B:** Create a narrative using the Pixar Pitch format to persuasively argue your case.

## F. Questions for the Employer and Discussion

Step 1's are an opportunity to discuss and resolve the issues. Ask the Employer for their rationale. Prepare a complete list of questions for the employer. For example: "Could you explain the Employer's reasoning behind..."

"Could you tell me why...", "What documentation is there to substantiate...", "We are curious as to..."

Listen attentively and take notes. Be sure to ask the Employer to slow down or repeat themselves so that you understand their answers.

## G. Information needed from the Employer

**Step 1's are an opportunity to formally request missing documentation which may be essential if moving on to Step 2, for example, letters, policies, memos, interview notes, missing evaluations etc. Ask for copies and ensure that your request is documented in the minutes.**

## H. Remedy Sought

Prepare your anticipated resolutions. Make sure you have a rationale as to why the resolution is in the best interest of both parties. A well prepared resolution can bring benefits to more than one. Ensure the grievor knows the entire continuum possibilities.

## I. Closure

Thank the Employer for the time spent. Review any action plan. For example: "You said that you would send us a copy of the interview questions in the next week". "I will anticipate a letter informing us of your decision regarding this grievance". "I will be forwarding the file to our LRO and they will be contacting you regarding this issue", etc.

Sign the grievance form and submit to the employer.

## J. Debrief with the Grievor

Ask the grievor how she/he felt the step 1 meeting went. Ask if she/he has any questions. Ask for the notes of the meeting. Review any next steps.