



Weingarten Meeting Checklist

Remember: Bring a notepad, pen and the Union Contract

1. Meet with the employee before the Weingarten Meeting

- Introduce yourself and ask the employee if they know what the meeting is about.
- Get the employee's side/version of the incident.
- Explain what will happen in the meeting and what the steward can (and can't) do. (See back page)
- Talk to the employee about how to answer employer questions. (See back page)

2. Use both this checklist and your notepad to document the following important information:

Name of Employee _____

Contact Number: _____ Email: _____

Those in attendance for Management:

Name: _____ Title: _____

Name: _____ Title: _____

Those in attendance for Union:

Name: _____ Title: _____

Name: _____ Title: _____

Meeting Subject:

Meeting Date: _____ Meeting Location: _____

When can we expect a decision about the investigation from the employer? _____

Next Steps: _____

Please attach all Meeting Notes to this Document!

Advice for Employees: Answering Questions

- Meetings can be stressful and it's important to remain calm. Management can use outbursts against you.
- Take your time when answering. Some people find it helpful to take their own notes and write questions down before answering.
- Keep your answers short.
- Do not volunteer information.
- Avoid making false statements.

Key Elements to Include in Notes

- Purpose of meeting/investigation.
- Key dates, if applicable.
- Key questions by employer and employee's response.
- Questions by Union: Who? What? When? Where? Why? How?
- Witnesses to event.
- Statements.
- Clarifying Comments.
- Ask to see any information the employer has collected, e.g., incident reports, emails, memos, etc.

Steward Rights in Weingarten Meetings

- Ask to be informed of the purpose of the meeting.
- If necessary, request clarification of a question before the employee responds.
- Ask the supervisor to clarify any questions the employee does not understand.
- Stop the supervisor from misleading or harassing the employee e.g., asking the same question multiple times.
- Request a caucus/recess during a meeting if you need more time to speak privately with the employee.
- Request that the meeting continue at another time if information is presented that requires additional investigation or preparation.

The 5 W's of Investigation

Who

- Who are the persons involved in the incident: member, witnesses, supervisors, colleagues (for and against the accused member), others?
- Who is making the complaint or accusation?

What

- What is alleged to have happened?
- What is the real or imagined complaint?
- What violation of the labor agreements, employer policy or past practice occurred?

When

- When did the incident occur?
- Was the incident on work time or at a work sponsored event?
- Did it occur more than once?

Where

- Where did the incident happen?
- Did it occur at work or on at another location?

Why

- Why did it occur?
- Was it a result of a misunderstanding?
- Has there been any changes in policy, practice or supervisors?
- Are the employees new and aware of employer's policy, the labor agreement and practices of the employer?

Investigation Form

Issue # _____

Name _____ Work Phone _____

Address _____ Home Phone _____

City and Zip _____ Work Location _____

Position _____

Immediate Supervisor _____ Title _____

I. Who were the persons involved? (names and job responsibilities)

II. What happened? (describe event with as much detail as possible)

III. When did it happen? Date _____ Time _____

IV. Where did the problem occur? (room, yard, etc.) _____

V. Were there witnesses to the event? _____

VI. Have any sections of the collective bargaining agreement and/or policy been violated? _____

VII. What has been the procedure management has followed in the past toward this type of problem? _____

VIII. What does the member want as a remedy? _____

Observation Form - Investigation

As you observe the investigatory meeting, watch for and note the successful use of skills and strategies in the following areas (not all with apply):

1. Initial engagement:

- Steward introduced themselves _____
- Steward puts the member at ease _____
- Steward clarifies their role _____

2. The Story

- Steward asks member to share what they believe the meeting is about.
- Steward asks Open ended questions
- Steward uses the 5 W's (Note some examples)
 - i. Who
 - ii. What
 - iii. When
 - iv. Where
 - v. Why
- Steward asks follow up questions
- Are there witnesses to the event?

3. Preparing the member

- Did the steward share what the meeting would be like?
- Did they ask if the members has any questions?
- Did they steward go over what happens after the meeting?

4. Behavior Observations (Observe both the steward and the member)

- Listening
- Focused
- Rattled or angry
- Eye Contact
- Note Taking
- Non-threatening body language
- Calm

5. Strengths about the interaction ...

6. Challenges in the interaction ...