STEWARD LEARNING SERIES

Grievance Fact Sheet

This Grievance Fact Sheet is designed to assist Stewards and local unions to keep a written record of what a grievance is about and what happens to it as it is processed through the various steps of the grievance procedure.

It is an important document and should be completed with care and accuracy. This document provides the union with a complete history of the case, including notes from the grievance meetings. It provides details about the grievance which may otherwise be overlooked or forgotten about. A copy of the completed fact sheet should be forwarded to the CUPE Representative once the grievance is referred to arbitration.

When the grievance is finalized, the completed fact sheet should be kept, along with the grievance form and Minutes of Settlement. These documents should be filed as per local union practices.

GRIEVANCE FACT SHEET

*To be filled out by the **Steward** and attached to the **grievance form**.*

Grievance No: _____ Local No.: _____

Who is involved in the grievance?

Grievor		
Name		
Department		
Classification		
Wage rate	$	
Seniority (provide start date, as applicable)	**Employer-wide**	**Bargaining unit**
	Department	**Classification**

Supervisor or other management involved	
Name	
Department	
Job Title	

Witnesses or other persons involved	
Name	
Department	
Classification	

Name	
Department	
Classification	

What happened? What is the grievance about?

Make sure to include all points mentioned on the checklist for each type of grievance.

When did the grievance occur?

Provide date and time grievance began. How often? For how long? Is it within time limits to proceed with a grievance?

Where did the grievance occur?

Provide exact location – department, machine, aisle, job number, etc. Include diagram, sketch or photo if helpful.

Why is this a grievance?

Was there unjust treatment? Was there a violation of:

- the contract?
- a supplement?
- a law?
- past practice?
- a safety regulation?
- rulings or awards?

Want. What does the Grievor want?

What will make the Grievor whole? What is needed to completely correct the situation and settle the grievance with full redress? In the case of discharge, ask for back pay.

Employer contends:

Employee record of Conduct

Warnings and/or penalties for lateness, absenteeism, quantity or quality of work, etc.
Provide date and reason for the warning or penalties.

	Date	Reason
Verbal warnings issued:		
Written warnings issued:		
Other discipline imposed:		

Any related information

Additional information

Information given by witnesses

Print the name of each witness followed by a summary of what each saw and heard. Get a signed statement.

_____

_____

_____

_____

_____

_____

_____

Signature of Witness _____ Date _____

Signature of Steward _____ Date _____

Signature of Aggrieved Employee _____ Date _____

CHECKLIST FOR GRIEVANCE INVESTIGATION

Have these points been covered and entered on the fact sheet?

Discipline and Discharge	✔
Previous work record.	
Complete record of events leading to discipline.	
An account of the incident resulting in discharge or reprimand.	
Management's reason for its action.	
Past practice in similar cases.	
Supervisor's name, etc.	
Name of witnesses, etc.	
Dates and times (important to case).	
Discrimination / Duty to Accommodate	✔
Any discrimination on a prohibited ground?	
Has the employer identified or made accommodation(s)?	
Has the union identified possible accommodation(s)?	
Effect on other members of bargaining unit by any proposed accommodation(s)?	
Would the collective agreement be violated by any proposed accommodation(s)?	
Does employer claim that "undue hardship" would result from proposed accommodation(s)?	
Harassment	✔
Incident: Date, time, place.	
Kind of harassment: personal, racial, sexual.	
Consequences: promotion denied, position downgraded, unfair discipline.	
Health effects: mental and physical.	
Identify harassment source: Supervisor, Departmental Head or Co-worker.	
Identify Witnesses: Co-workers and others.	
Is this a repeated incident?	
Has it been drawn to management's attention before?	

Discharge and Discipline Continued	✔
Did you ask about any previous record, good or bad, long or short?	
Did you probe any extenuating circumstances, including personal problems of grievor?	
Did you ask about the personal character of all people involved?	
Did you discuss the consequences of the penalty?	
Did you consider whether or not the punishment fits the crime?	
Did you advise the Grievor to seek employment while waiting?	
Dismissal for Innocent Absenteeism	✔
Grievor's attendance record, including reasons for absences.	
Likelihood of recovery.	
Any disability requiring accommodation to the point of undue hardship?	
Job Postings – Unsuccessful Applicant	✔
Grievor's classification and seniority.	
Grievor's experience and previous jobs.	
Name, classification and seniority of successful applicant.	
Experience and previous jobs of successful applicant.	
Management's reasons for rejecting the Grievor.	
Management's reasons for choosing the successful applicant.	

Improper Layoff or Recall	✔
Employer-wide seniority of Grievor.	
Bargaining-unit seniority of all involved.	
Departmental seniority of all involved.	
Classification or group seniority of all involved.	
Type of work to be performed.	
Previous experience of all concerned.	

Overtime – Regular	✔
Date and shift overtime was scheduled.	
Classification scheduled for overtime.	
Grievor's classification.	
Name and classification of employee who worked.	
The actual work that was performed.	
Previous record of overtime distribution.	
Last time Grievor worked overtime.	
Number of accumulated hours of overtime for Grievor (and others).	
Supervisor's reasons for not asking Grievor to work.	

Safety Hazards	✔
Name, classification, department of Grievor.	
An account of the incident.	
What caused the complaint?	
Has it been previously reported?	
What action has management taken?	
What law or rule is violated?	
Witnesses: names, etc.	
Any injuries.	
Nature of injury.	

Transfer – Denial of	✔
Grievor's seniority and classification.	
Department requested.	
Name of new employees hired.	
Date of request for transfer.	
Availability of replacement for Grievor.	
Supervisor's reasons for not agreeing to transfer.	

Improper Pay – Work Assignment	✔
Grievor's classification and seniority.	
Grievor's regular work assignment.	
Grievor's assignment on day in question.	
Rate of pay applicable to assignment.	
Exact work performed by Grievor and instructions from supervisor.	
Grievor's experience and previous jobs.	

Overtime – Statutory Holidays	✔
Same as regular overtime.	
Identify Statutory Holidays involved.	
Verify that Grievor qualified for holiday pay.	
Verify that Grievor was willing to work.	
Verify that it was Grievor's turn to work.	
Verify that supervisor deliberately bypassed Grievor.	

Supervisors Working	✔
Name of person doing work.	
Type of work performed.	
Amount of time worked.	
Area where work was done.	
Grievor's classification.	
Availability of Grievor.	
Supervisor's reason for working.	

Vacations	✔
Time requested.	
Time allotted.	
Seniority.	
Number of Employees in work group.	
Employer's reasons for denial of request.	
Names of other employees involved.	
Seniority and classification of other employees involved.	

MEETINGS HELD AND DISPOSITION OF GRIEVANCE

STEP 1

_____

(insert level of management involved)

Date: _____

Persons present: _____

_____

Outcome: _____

_____

_____

_____

_____

Signed: _____

STEP 2

_____

(insert level of management involved)

Date: _____

Persons present: _____

_____

Outcome: _____

_____

_____

_____

_____

Signed: _____

STEP 3

_____

(insert level of management involved)

Date: _____

Persons present: _____

_____

Outcome: _____

_____

_____

_____

_____

_____

Signed: _____

STEP 4

_____

(insert level of management involved)

Date: _____

Persons present: _____

_____

Outcome: _____

_____

_____

_____

_____

_____

Signed: _____

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