

Steward News...

a publication for CUPE Activists in Alberta

Winter 2004

TAKING GOOD NOTES DURING GRIEVANCE MEETINGS

A steward in a training session was asked how he knew that the notes he took were good. "They're good notes," he replied, "because I can find them when I need them later and I can read my own writing!"

Taking the notes, keeping them and being able to read them later is 80% of the game. There are a number of reasons why notes from a grievance meeting are essential:

- You won't remember all you hear by the time you need to use it for writing the grievance or arguing your case.
- A written record can be used by others in the union (the chief steward, a union representative or a union lawyer) who may handle grievances at later steps or in arbitration.
- A written record helps you compare conflicting accounts of the same situation. It's not uncommon for the grievor to tell you one version of the incident and the supervisor another.
- Writing down what people tell you lets them know that you take your responsibilities as a steward seriously and that the union cares. Your notes can also be used as evidence that you conducted an investigation if a member later claims that the union failed to fairly represent him or her.
- Note taking forces you to organize your interview more effectively and be more thorough.
- Keep a "union note book" so all your notes are in one place.

In order to make the process easier:

- If the union has a grievance interview form, make sure you use it. If not, write out the Five W's (*who, what, where, when and why*) and other relevant questions before the interview. Leave space for answers.
- Ask the member to repeat information so you can write it accurately. Let him know that the notes are for "union eyes only".
- Try to get direct quotes on what the member says was said and use quotation marks to indicate direct quotes in your notes. For example: According to Ralph, when Ralph called in sick, the supervisor said "You're a bald-faced liar." Ralph replied, "Those are fighting words."
- When you are finished with the interview, go over your notes with the member to make sure you have written everything accurately. Again, this conveys to the member that the union is interested in being accurate.
- When in doubt, write it down. People will give you all kinds of information during interviews and some of it you really won't need. But it's more efficient to take it down at the time than to have to go back again when memories get fuzzy.

As you become more experienced with the grievance process, you will have a better idea of the information you will need and note-taking will become easier. The time you put into taking complete, accurate notes will pay off as you complete the other task of the grievance procedure.



Writing It Down



THE EMPLOYER'S PAPER TRAIL

Many stewards have been in the situation where the employer has created a paper trail in order to build a case against a member. Verbal warnings and letters may be recorded in the member's personnel file.



All too frequently, a member does nothing when given a written or verbal warning. Members must be advised never to accept discipline that the member and/or the local union believes is unjust.

This doesn't mean every letter of warning has to be or will be arbitrated. In many cases, it's enough just to challenge that letter with the member's and/or union's version of what happened. This challenge should be put in writing and placed in the member's personnel file. Make sure the union retains a copy.

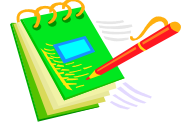


If supervisory warnings are not challenged in writing, they stand as accepted. Management has made an art form out of progressive discipline. The union needs strong ammunition in any disciplinary situation, because the next incident could be cause for a suspension or termination.



HOW TO CREATE A UNION RECORD

Start by getting a notebook and using it, particularly when you are handling complaints and grievances.



In your grievance interview with a member, write down what he or she says. Don't worry about spelling - just get it down. CUPE has a grievance interview sheet to help the steward ask the questions. For a copy, please contact Sister Pam Smith in the Calgary Area Office (403) 235-6955 or psmith@cupe.ca.

Remember that the very act of writing down the member's story conveys a professional image of your role as a Steward and representative of the Union. Just as important, the member may be more truthful in giving you the whole truth - warts and all.



Taking notes while meeting on a grievance with the employer conveys a sense of no-nonsense and professionalism to him as well. If you are too busy presenting the case, if possible, get another steward to take notes.



Writing It Down

EMPLOYER HARASSMENT

A member may come to his steward with a complaint about a supervisor who appears to be picking on him. The member gets the worst assignments, or the supervisor always seems to be breathing down his neck such as double checking his work and only his work.



Issues such as employer harassment are ones which usually boil down to the member's version of the story versus the supervisor's version.

When a member comes to you with a harassment issue, tell him/her to document each and every harassing incident. Just as management builds disciplinary cases against the member, the union must build a case against the offending supervisor.



Tell the member to write down the incident, when and where it happened, what happened, and the names of any witnesses. By putting together a record of the harassment, the member is directly involved in their grievance process and the union will have the necessary documentation to make its best case.

REMEMBER, get into the habit of writing down everything.



WRITE IT DOWN

FOUR PURPOSES FOR NOTE-TAKING:

- Provides a written record for review
- Forces the listener to pay attention
- Requires organization, which involves active effort on the part of the listener
- Listener must condense and rephrase, which aids understanding

WHILE TAKING NOTES

- Don't try to take word for word notes
- Get all of the main ideas
- Record some details, implications, etc.
- Integrate with other knowledge you already have but don't allow preconceived notions to distort what you hear
- Underscore or star major points
- Leave plenty of white space for later additions
- Be accurate
- Listen carefully to what is being said
- Pay attention to qualifying words like: *sometimes, usually, rarely, etc.*
- Notice signals that a change of direction is coming: *but, however, on the other hand*
- Be an aggressive, not a passive, listener
- Ask questions and discuss
- Seek out meanings.
- Look beyond what is being said
- Jot down words or phrases, not entire sentences
- Develop some system of shorthand and be consistent in its use
- Leave out small service words
- Use abbreviations
- Use symbols: +, =, &, @

AFTER TAKING NOTES:

- Review and reword them as soon as possible
- Don't just recopy or type without thought
- "Reminiscencing" may provide forgotten material later
- Rewrite incomplete or skimpy parts in greater detail
- Fill in gaps as you remember points heard but not recorded
- We forget 50% of what we hear immediately; two months later, another 25% is gone. But relearning is rapid if regular review is used
- Compare the information in your notes with your own experience
- Don't reject what seems strange or incorrect. Check it out.

Writing It Down



We, the willing, led by the unknowing, have been doing the impossible, for the ungrateful. We have done so much for so long with so little, we are now qualified to do anything with nothing.
- *Unknown*

Graffiti scrawled on bathroom wall: "Who was Joe Hill?" Reply scribbled underneath: "If you don't know, learn. If you know, teach."

FOOD FOR THOUGHT

Leaders must be tough enough to fight;
Tender enough to cry;
Human enough to make mistakes;
Humble enough to admit them;
Strong enough to absorb the pain;
Resilient enough to bounce back and keep on moving.

Rev. Jesse Jackson

Whenever you find injustice, the proper form of politeness is attack.

T-Bone Slim

The Obituary of "Someone Else"

The Union was saddened to learn this week of the death of one of its most valuable members – *Someone Else*. *Someone's* passing created a void that will be difficult to fill. *Someone Else* had been with us for many years and for every one of those years did more than a normal person's share of the work. Whenever leadership was mentioned this wonderful person was looked to for inspiration as well as results. Whenever there was something to do or a meeting to attend, one name was on everyone's list – Let *Someone Else* do it.

It was common knowledge that *Someone Else* would make the difference. *Someone Else* sometimes appeared to be super-human; but a person can only do so much. Were the truth known, everybody expected too much of *Someone Else*. Now, *Someone Else* is gone. We wonder what we are going to do.

Someone Else did leave a wonderful example to follow, but who is going to follow? Who is going to do all the things that *Someone Else* did?

If you have a chance to participate in your Union – to join a committee or to lend a hand, please remember: we can't depend on *Someone Else* anymore.

- *Unknown*