

## Investigatory Meetings

### Before the meeting:

- ◆ Learn about the issue
- ◆ Meet with the member ahead of time and hear their side of the story
- ◆ Explain the steward's role in the meeting:
  - Moral support
  - Note taker
  - May call a caucus
  - May ask clarifying questions or object to a line of questioning
- ◆ Establish trust
- ◆ Don't promise outcomes
- ◆ Discuss what to expect and how to handle strong emotions
- ◆ Set a signal for caucusing and discuss the terms of a caucus ahead of the meeting
- ◆ Advise member to:
  - Be honest
  - Only answer the question that is asked and avoid speculation in your answer
  - Give concise responses to questions
  - Pause before answer a question and consider why it was asked
  - Assume management has more information than they are letting on

### During the meeting:

- ◆ Take notes
- ◆ Ask clarifying questions
- ◆ Provide moral support
- ◆ Keep management on track if the meeting is no longer investigatory
- ◆ Do not argue the case or answer for the employee during the meeting
- ◆ Object to misleading or argumentative questions
- ◆ Call for a break or caucus when necessary
- ◆ Request copies of any relevant documents
- ◆ Close the meeting by asking when management will provide results

### After the meeting:

- ◆ Debrief with the member
- ◆ Review your notes- Did any other contract violations come up during the meeting?
- ◆ Provide any additional information to management or obtain any additional information
- ◆ Follow up with management to find out results of the investigation
- ◆ If unfair discipline has occurred, prepare to appeal the decision
- ◆ Keep the member informed of next steps