

## INVESTIGATION MEETING NOTES FORMAT

**Guidelines:** This meeting is an opportunity for the employee to give their side of what the employer thinks happened. **Take clear notes because this is our opportunity to gather information.** We are not lawyers, we will not “save the day” or present a grievance case today. Below is an outline of what you may want to look for. You are not alone, review your case with another steward, we all do, no matter how much experience we have.

Date: \_\_\_\_\_

Employee: \_\_\_\_\_

Classification: \_\_\_\_\_

Work Location: \_\_\_\_\_

Hours of work: \_\_\_\_\_

Date of alleged violation: \_\_\_\_\_

Work Rule alleged violation: \_\_\_\_\_

Other rules alleged violated: \_\_\_\_\_

What is expected of the employee now? \_\_\_\_\_

\_\_\_\_\_

What documents should we request in the future?

\_\_\_\_\_

\_\_\_\_\_

Notes:

Labor:

Management: