

Union's Position: _____

Employer Position: _____

SECTION 2 – INFORMATION AND DOCUMENTS

Information Checklist:	<u>In file</u>	<u>Requested But Not Provided</u>	<u>Not Applicable</u>
Grievance Form:	<input type="checkbox"/>		
Grievance Decision letters:	<input type="checkbox"/>		
Discipline Notice:	<input type="checkbox"/>	<input type="checkbox"/>	
Personnel File (relevant info):	<input type="checkbox"/>	<input type="checkbox"/>	
Applicable Facility Policies:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Complaints/letters:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Patient Chart:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Witness statements:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contract language	<input type="checkbox"/>		

Information requests to management (Include requests and responses in file):

#1 – Sent to: _____ Date: ____/____/____ Information requested: _____

#2 – Sent to: _____ Date: ____/____/____ Information requested: _____

Witness Statements (Please provide additional names on a separate sheet if needed. Attach full statements to file):

#1 – Name: _____ Date: ____/____/____

Summary of statement:

#2 – Name: _____ Date: ____/____/____

Summary of statement:

#3 – Name: _____ Date: ____/____/____

Summary of statement:

Grievant – Previous Disciplines: If there are previous disciplines, list by date, level of discipline, and result of grievance

SECTION 3 – ANALYSIS

Did the Employer have “just” or good cause for the discipline?

Elaborate below only if not included in narrative.

Element	Analysis Elaborate below only if not included in the narrative
Reasonable Rule <i>Was the rule or order reasonably related to the (a)orderly, efficient, and safe operation of the department/unit or(b) standards of job performance that might be properly expected of employees?</i>	Union’s Position:
	Employers Position:
Notice <i>Did the employee receive adequate notice that the particular conduct would have disciplinary consequences?</i>	Union’s Position:
	Employers Position:
Due Process <i>Before administering discipline, did the employer conduct a thorough investigation? Was the employee intimidated and coerced in the course of the investigation: Did the employee have the right to union representation during the investigation?</i>	Union’s Position:
	Employers Position:
Proof <i>Did the investigation produce substantial evidence or proof that the employee actually violated a rule or order?</i>	Union’s Position:
	Employers Position:
Equal Treatment <i>Is the employer consistent in its application of the rule or policy that the discipline was based on? Is the employee who is disciplined being treated more harshly than others?</i>	Union’s Position:
	Employers Position:
Appropriate Discipline/Mitigating Circumstances <i>Was the discipline proportionate to the seriousness of the offense and the work record/seniority of the employee?</i>	Union’s Position:
	Employers Position:
Progressive Discipline <i>Did the employer use the discipline process in a corrective and remedial way? For relatively minor offenses, did the employer use progressive discipline?</i>	Union’s Position:
	Employers Position:

Any similar, previous grievances or arbitrations? Yes No

If Yes, provide date and outcome of the grievances/arbitrations:

#1: _____
#2: _____
#3: _____

Reviewed by Local Executive Board Approve Disapprove Date: ___/___/___

If disapproved, date of letter to grievant regarding LEB Decision and their right to appeal to SEC: _____

Signature of Grievance Chair _____ Date: ___/___/___

SECTION 4 – EVALUATION AND DECISION

Strengths and Weaknesses of the Grievance (To Be Completed by Staff Rep):

Strengths: _____

Weaknesses: _____

Summary reviewed for completeness

Signature of Staff Representative: _____ Date: ___/___/___

THIS FORM MUST BE COMPLETE PRIOR WITH ALL APPLICABLE DOCUMENTS ATTACHED PRIOR TO FILING THE GRIEVANCE FOR ARBITRATION

