



# UNION FACT SHEET

## FOR THE UNION ONLY

To be filled out by the Steward and attached  
to the UNION COPY ONLY of Grievance No. .... Local .....  
Unit .....

PLEASE PRINT

### WHO IS INVOLVED IN THE GRIEVANCE?

#### GRIEVOR:

Name .....	Phone Number .....
Department .....	Rate .....
Job Title .....	
<b>SENIORITY - Service from (date) .....</b>	
<b>Department Service from (date) .....</b>	
<b>Job Service from (date) .....</b>	

#### SUPERVISOR OR OTHER MANAGEMENT INVOLVED:

Name .....
Department .....
Job Title .....

#### WITNESSES or OTHER PERSONS INVOLVED:

Name .....	Phone Number .....
Department .....	
Job Title .....	
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Name .....	Phone Number .....
Department .....	
Job Title .....	

**WHAT HAPPENED? WHAT IS THE GRIEVANCE ABOUT? (Make sure to include all points mentioned on the checklist for each type of grievance.)**

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**WHEN DID THE GRIEVANCE OCCUR? (Note date and time the grievance began. How often? For how long? Is it within time limits to proceed with a grievance?)**

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**WHERE DID THE GRIEVANCE OCCUR? (Note exact location – department, work station, equipment, etc. Include diagram, sketch or photo if helpful.)**

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**WHY IS THIS A GRIEVANCE? (Violation of contract? Law? Past practice? Safety regulations? Rulings or awards? Unjust treatment? etc.)**

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**WANT GRIEVANCE SETTLED and REDRESSED IN FULL (Adjustments necessary to completely correct situation. In case of discharge, ask for all loss of wages.)**

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EMPLOYER CONTENDS: .....

**Employer record of conduct** (Warnings and/or penalties for lateness, absenteeism, quantity or quality of work, etc.)

**Dates:**

**Reasons:**

Verbal warnings issued:.....  
Written warnings issued:.....  
Penalties 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 if necessary.)

**Documentary evidence** (Seniority list, wage schedule, record of similar grievance, etc.)

Date ..... Signature of Steward or  
Committee Member .....

Signature of Aggrieved Member .....

**CHECKLIST  
FOR GRIEVANCE INVESTIGATION  
HAVE THESE POINTS BEEN COVERED AND ENTERED ON FACT SHEET?**

**\*\* Discharge and Penalties**

1. Just cause.
2. Complete statement of events leading to discipline.
3. Date and times (important to document).
4. Supervisor's name.
5. Name, address, phone and statement of witness (if any).
6. Employee's record.
7. Print or diagram of area (if applicable).

**Temporary Promotion**

1. Grievor's seniority and classification.
2. Grievor's qualification.
3. Classification promotion was made.
4. Time of promotion.
5. Availability of grievor at time of promotion.
6. Name of supervisor involved.
7. Name of employee promoted.
8. Location promotion made.
9. Instructions to grievor (if any).
10. Exact work performed by grievor.
11. Articles violated.

**Overtime**

1. Grievor's classification.
2. Shift or work group.
3. Date and shift overtime was scheduled.
4. Classification scheduled for overtime.
5. Name and classification of employee who worked.
6. Record of overtime from supervisor's book.
7. The actual worked that was performed.
8. Articles violated.

**Job Posting**

1. Grievor's classification and seniority.
2. Grievor's previous classifications.
3. What grievor was temporarily promoted to.
4. Date of promotions (if any).
5. Pay stubs if possible.
6. Grievor's experience in vacancy requested.
7. Name and seniority of employee awarded job.
8. Number of posting and grievor's application.
9. Articles violated.

**Statutory holiday**

1. Same as overtime.
2. Seniority of grievor.
3. Seniority of employees who did work.

**Improper Pay  
(Work assignment)**

1. Grievor's regular posted classification.
2. Grievor's regular work assignment.
3. Grievor's assignment on day in question.
4. Name of employees who worked in grievor's place (if any).
5. Name of employee available (junior to grievor).
6. Date of grievor's last posting.
7. Safety involved (if any).
8. Rate of pay applicable to assignment.
9. Exact work performed by grievor and instructions from supervisor.
10. Articles violated.

**Vacations**

1. Seniority.
2. Time requested.
3. Time allotted.
4. Grievor's qualifications.
5. Name and classification of junior employees.
6. Number of employees in work group.

**Job Postings  
(Improper or Non-Posting)**

1. Classification of vacancy.
2. Area vacancy existed.
3. Name of employee who held vacancy.
4. Name of employee promoted to fill vacancy.
5. Article violated.
6. Shift at time of posting.

**Supervisor Working**

1. Name of personnel doing the work.
2. Type of work performed.
3. Amount of work performed.
4. Area where work was done.
5. Grievor's classification.
6. Availability of grievor.

**Removed from posting**

1. Grievor's posted classification.
2. Date of last posting.
3. Grievor's qualifications.
4. Reasons for removal.
5. Classification assigned to.
6. Name of employees junior and not affected.

**Demotion**

1. Grievor's classification and seniority.
2. Number of employees affected.
3. Grievor's qualifications.
4. Classification demoted to.
5. Name of junior employees holding higher rated jobs (if any).
6. Name of employee performing grievor's regular work (if any).
7. Articles violated.

**Transfers**

1. Seniority.
2. Department requested.
3. Name of new employees.
4. Grievor's classification.
5. Employees available to replace grievor.
6. Date of grievors's request for transfer.

**\*\*Note:**

*If this is a Discharge or Discipline Case: –*

- Did the steward ask about any personal problems of the grievor?
- Did the steward ask about any previous record, good or bad, long or short?
- Did the steward probe any extenuating circumstances in this case?
- Did the steward ask about the personal character of all people involved?
- Did the steward discuss the consequences of the penalty?
- Did the steward consider whether or not the "punishment fits the crime"?
- Did the steward advise the grievor to seek employment while waiting?