

UNION FACT SHEET
CONFIDENTIAL FOR THE UNION ONLY

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

PLEASE PRINT

WHO IS INVOLVED IN THE GRIEVANCE?
GRIEVANT

| | |
|---|-----------------|
| Name: _____ | Check No. _____ |
| Department: _____ | |
| Job and Class: _____ | Rate: _____ |
| SENIORITY – Plant Service from (date) _____ | |
| Department Service from (date) _____ | |
| Job Service from (date) _____ | |

FOREMAN or OTHER MANAGEMENT INVOLVED:

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|-------------------|
| Name(s): _____ |
| Department: _____ |
| Job title: _____ |

WITNESSEES or OTHER PERSONS INVOLVED:

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|----------------------|
| Name: _____ |
| Department: _____ |
| Job and Class: _____ |
| Phone Number: _____ |
| Name: _____ |
| Department: _____ |
| Job and Class: _____ |
| Phone Number: _____ |

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

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

WHERE DID THE GRIEVANCE OCCUR? (exact location – department, machine, aisle, job number, etc.; include diagram, sketch or photo if helpful)

WHY IS THIS A GRIEVANCE? (violation of contract? supplement? law? past practice? safety regulations? rulings or awards? unjust treatment? etc.)

WANT GRIEVANCE SETTLED and REDRESS IN FULL (adjustments necessary to completely correct situation; incase of discharge ask for back pay)

COMPANY CONTENTS: _____

Company record of Conduct (Warnings and/or penalties for lateness, absenteeism, quality of work, etc.)

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, Work Ticket, Record of similar grievance, etc.)

Signature of Steward or Committeeman: _____ Date: _____

Signature of Aggrieved Employee: _____ Date: _____

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

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| **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. Grievant's seniority and classification. 2. Grievant's qualification. 3. Classification promotion was made. 4. Time of promotion. 5. Availability of grievant at time of promotion. 6. Name of supervisor involved. 7. Name of employee promoted. 8. Location promotion made. 9. Instructions to grievant (if any). 10. Exact work performed by grievant. 11. Articles violated. | Overtime 1. Grievant'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 work that was performed. 8. Articles violated. |
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| Job Posting 1. Grievant's classification and seniority. 2. Grievant's previous classifications. 3. What grievant was temporarily promoted to. 4. Date of promotions (if any). 5. Pay stubs if possible. 6. Grievant's experience in vacancy requested. 7. Name and seniority of employee awarded job. 8. Number of posting and grievant's application. 9. Articles violated. | Improper Pay (Work Assignment) 1. Grievant's regular posted classification. 2. Grievant's regular work assignment. 3. Grievant's assignment on day in question. 4. Name of employees who worked in grievant's place (if any). 5. Name of employee available (junior to grievant). 6. Date of grievant's last posting. 7. Safety involved (if any). 8. Rate of pay applicable to assignment. 9. Exact work performed by grievant and instructions from supervisor. 10. Articles violated. | Statutory Holiday 1. Same as overtime. 2. Seniority of grievant. 3. Seniority of employees who did work. |
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| 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. | Demotion 1. Grievant's classification and seniority. 2. Number of employees affected. 3. Grievant's qualifications. 4. Classification demoted to. 5. Names of junior employees holding higher related jobs (if any). 6. Name of employee performing grievant's regular work (if any). 7. Articles violated. | Vacations 1. Seniority. 2. Time requested. 3. Time allotted. 4. Grievant's qualification. 5. Name and classification of junior employees. 6. Number of employees in work group. |
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| Removed from Posting 1. Grievant's posted classification. 2. Date of last posting. 3. Grievant's qualifications. 4. Reasons for removal. 5. Classification assigned to. 6. Name of employees junior and not affected. | | Supervision Working 1. Name of personnel doing the work. 2. Type of work performed. 3. Amount of time worked. 4. Area where work done. 5. Grievant's classification. 6. Availability of grievant. |
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| Transfers 1. Seniority. 2. Department requested. 3. Name of new employees. 4. Grievant's classifications. 5. Employees available to replace grievant. 6. Date of grievant's request for transfer. |
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****Note:**

If this is a Discharge of Discipline Case: -

- Did the steward ask about personal problems of the grievant/
- 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 grievant to seek employment while waiting?