

Checklist for Meetings Called by Management

Use this before any meeting with management to prepare strategically and stay centered. Such as Investigatory Interviews, Corrective Memos, Performance Appraisals.

1. Purpose & Outcomes

Type of meeting

Purpose of meeting

From management's point of view

From our point of view

What do we expect management to do?

Member prepared, knows what to expect (what usually happens at this type of meeting)

Reminder: These types of meetings almost never end in agreement. Getting information, finding out what we're up against, are wins. We can respond later, in writing or in a second meeting.

2. Rights Check (Weingarten & Beyond)

Would it be reasonable to believe that this meeting will lead to discipline?

Have Weingarten rights been asserted?

- Management notified a union rep will attend
- General topic of meeting disclosed in advance (management will not disclose everything they plan to ask about, ahead of time).

We are prepared to say:

"If this meeting could lead to discipline, I request union representation."

We know we can:

- Take notes
- Ask clarifying questions

- Request a break

Document if rights are violated, but do not attempt to leave the meeting, especially if it's an Investigatory Interview

3. Roles in the Room

Who is attending?

- Management: _____
- Member(s): _____
- Steward/Rep: _____

Who will:

- Lead the conversation (in these meetings, it will be management or an investigator)
- Take notes
- Step in if boundaries are crossed
- Watch time and pacing

Agreed signal if the member needs support or a pause: _____

4. Facts & Documentation

Accept that we may not know ahead of time what the specific topics or questions are going to be.

If we do know what the questions are about, are we prepared?

What *facts* do we know? (Dates, times, policies, emails, witnesses)

What documents do we have with us?

- Contract language
- Policies/procedures
- Emails or written records
- Past precedents

- What facts are unclear or disputed?

Strategy: Stick to verifiable facts. Avoid speculation or emotional interpretation.

5. Logistics

- Time and location confirmed
- Notes template ready
- Paper, pen, or device prepared
- Plan for post-meeting debrief

6. Grounding Before You Enter

- Take 3 slow breaths (in through nose, out through mouth)
- Drop shoulders, feel feet on the floor
- Quiet reminder to self:

“I have the right to be here. I am prepared.”

- Final check: Are we steady enough to proceed?