

# Checklist for Meetings Called by the Union

*Use this before any meeting with management to prepare strategically and stay centered. This includes grievance meetings, meetings to present a rebuttal to a corrective memo or performance appraisal.*

## 1. Purpose & Outcomes

- Why are we meeting? (Be specific: contract violation, workload, filing a complaint, presenting a rebuttal, etc.)
- What outcome are we seeking *today*?
  - Information
  - Resolution
  - Time to review/follow up
  - Something else: \_\_\_\_\_
- What does a “good enough” outcome look like if we don’t get everything?

*Reminder:* Not every meeting ends in agreement. Clarity and documentation are wins.

## 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
  - Topic of meeting disclosed in advance
- 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



- End the meeting if rights are violated

### 3. Roles in the Room

- Who is attending?

Management: \_\_\_\_\_

Member(s): \_\_\_\_\_

Steward/Rep: \_\_\_\_\_

- Who will:

- Lead the conversation
- 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

- 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. Likely Management Positions

- What might management say or argue?
- What pressure points might they use? (urgency, policy, tone, authority)



Our prepared responses (short, calm, repeatable):

- “We’ll need to review that.”
- “Please show us where that’s written.”
- “We’re not prepared to answer that today.”
- “Let’s stay on the specific issue.”

## 6. Boundaries & Strategy

Topics we **will** discuss today: \_\_\_\_\_

Topics we **will not** discuss today: \_\_\_\_\_

Questions we are *not* required to answer immediately

Information we may need to take offline

*Reminder:* Silence, pauses, and note-taking are tools—not weaknesses.

## 7. Logistics

Time and location confirmed

Notes template ready

Paper, pen, or device prepared

Plan for post-meeting debrief

## 8. 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?

