INVESTIGATION MEETING
CHECKLIST

BEFORE the Meeting

- [ ] **Find out the purpose of the meeting** – Request clarification (if needed) from the Employer about the meeting, and find out the date(s) of the event being investigated and the general theme of the meeting.
- [ ] **Contact the LRO** – Check in with your LRO and send all information and notes. Talk through any concerns with your LRO.
- [ ] **Check in with member** – contact the member and let them know you are available to attend the meeting with them. Get their perspective about what happened. The member may be anxious and looking for reassurance, so letting them give their perspective will help.
- [ ] **Confirm meeting details** – confirm the date, time, and location of the investigation meeting with the member, and arrange to meet with the member 15-30 minutes beforehand (pre-meeting) to review instructions.
- [ ] **Seek guidance as needed** – if after speaking with the member you still have questions or concerns, speak with your LRO.

PRE-Meeting

- [ ] **Prepare the member** – Meet with the member to go over the process, provide them with instructions, answer any questions, and help calm them down before the meeting. Be reassuring yet realistic, and refocus them on the task.

DURING the Meeting

- [ ] **Stay calm** – model professional, calm behaviour for the member
- [ ] **Take notes** – write down (via handwriting or typing) the names of the people present, who says what during the meeting (using initials), what questions are asked, how they are answered, and any details or important points. *Ask people to slow down or repeat questions and answers if you are falling behind.*
- [ ] **Clarify the purpose** of the meeting if needed.
- [ ] **Intervene** when the Employer asks vague questions if the member didn't already ask for clarification. The member or the representative can ask the Employer to be more specific. The questions should be related to the investigation/issue. Caucus if needed.
- [ ] **Caucus** – take a break when you need to regroup, the member seems distressed, you need to confirm details, or you need assistance from an LRO.
- [ ] **Request copies** of any documents or evidence that the Employer is using and write down what you requested and their response in your notes.
- [ ] **Ask for timelines** – get the Employer's timeline for the outcome meeting.

AFTER the Meeting

- [ ] **Debrief with the member** – ask how they are feeling and let them know that you will be following up with the LRO and them to talk about next steps.
- [ ] **Prepare** the member for next steps, including grievance filing
- [ ] **Report back to your LRO** – make sure to give the LRO copies of all notes and documents and discuss what to do next, such as file a grievance.