

## Investigatory Meetings: Observer Checklist

Use this checklist as a guide when observing an Investigatory Meeting. Write down specific examples in the space provided. What went well? What could be done differently?

### **Pre-Meeting:**

- Learned about the issue and heard the employee's side of the story
- Explained what to expect in the meeting
- Explained the steward's role in the meeting
- Advised member on best practices (be honest, be concise, only answer questions asked)
- Explained the purpose of a caucus and set a signal for calling a caucus

Comments: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

### **During the Meeting:**

- Took notes
- Asked clarifying questions *as needed*
- Objected to a line of questioning *as needed*
- Provided moral support *as needed*
- Asked for a caucus *as needed*
- Didn't argue the case
- Asked supervisor when they would have results of the investigation

Comments: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

### **After the Meeting:**

- Debriefed with employee
- Explained next steps

Comments: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_