

# SAMPLE INVESTIGATION FACT SHEET

(For union investigative purposes only. Keep in union's file. **DO NOT** share with management.)

Worker's Name \_\_\_\_\_ Phone \_\_\_\_\_

Department \_\_\_\_\_ Job Title \_\_\_\_\_

**WHO** is involved? \_\_\_\_\_

\_\_\_\_\_

**WHO** from management is involved? \_\_\_\_\_

**WHO** are the witnesses? \_\_\_\_\_

**WHAT** happened? (If there was an incident, include WHERE and WHEN it took place.)

\_\_\_\_\_

\_\_\_\_\_

**WHAT** else is important to this case? (Worker's record, other history of the problem, questions of "just cause," management's position, etc.?)

\_\_\_\_\_

\_\_\_\_\_

**WHY**, if so, is this a grievance? (contract violation, past practice, company rules, laws?)

\_\_\_\_\_

\_\_\_\_\_

**HOW** do we want the company to make it right? \_\_\_\_\_

\_\_\_\_\_

Steward Name \_\_\_\_\_ Date \_\_\_\_\_