

## **Representational Checklist for Stewards**

When you have made contact with a member or members regarding a claim of bullying/hostile work environment the following checklist offers a path for representation:

- ✓ **Schedule a time to meet with the member(s).**
  - *If you are dealing with a group of members, enlist additional stewards to assist as you move forward as your time can be stretched thin.*
- ✓ **Immediately advise the member(s) to document all incidents including name of abuser, description of behaviors, place and time the incident occurred, and whether or not there were any witnesses.**
  - *If the member(s) has already started documenting, request a copy or review with them. If no prior documenting has happened, the member(s) should, to the best of their ability, retrace prior incidences and fill in as much information as possible. If you are working with a group, consider using a survey to collect the data.*
- ✓ **Make an assessment with your Chief Steward, Regional Lead, and/or other stewards to determine if the behaviors would be defined as bullying.**
  - *If your assessment is yes, continue on this checklist. If no, determine what is actually occurring and establish the best course of action, if any, to address the issue. In addition to your regional team, consult with your Business Agent. Talk with the member(s) about your assessment and give reasons for your decision.*
- ✓ **Ask the member(s) if they have had any discussions about their claim of bullying with management, co-workers, or others.**
  - *This will be important information for you to have as you move forward. Make sure these discussions are documented by yourself and the member(s).*
- ✓ **If possible, the stewards should speak with other employees in the unit/worksites, witnesses to the behavior, or past employees that may have left due to the bullying to take initial statements.**
  - *That way the member(s) and steward(s) know how widespread the behavior has been, what claims are supported by witnesses, and co-workers can be organized to support a healthy work environment.*

- ✓ **Review the Respectful Workplace Policy with the member(s) and make sure they have a copy.**
  - *If you have assessed that the behaviors does not meet the bullying and/or criteria put forth in the policy, the member(s) can still proceed through the process under the policy in order to have the Agency determine whether or not it meet the criteria of “unprofessional/disrespectful” behavior.*
- ✓ **Understand the investigatory process fully by asking questions and monitoring.**
  - *This is not your typical investigatory process for a member that is being questioned for wrong doing. Keep copies of any and all documents you receive related to this process. Challenge any steps that do not fit the criteria of the policy: “all investigations will be conducted in a timely, fair, and impartial manner.”*
- ✓ **If the member(s) decides to file an informal or formal complaint under the policy, follow the process closely.**
  - *The policy refers to an informal resolution and formal investigatory processes under the policy will be “timely, fair and objective. Those are the benchmarks you should be watching for and addressing if not met.*
- ✓ **Determine who in HR you can go to with clarifications or concerns as they may arise.**
  - *There will probably be discussions that you will want to have along the way – especially if you see problems arise in parts of the policy or an outcome to an investigation. Remember, this is a new policy for HR also!*
- ✓ **Be prepared for any retaliatory behavior by the abuser and be prepared to take action to stop it.**
  - *Request the same documentation from the member(s) as in the initial allegation. The Steward is the representative that can demand this behavior cease and desist and can strategize with other representational partner’s ways to move our message loudly and clearly.*
- ✓ **Understand fully the findings, resolutions, and outcome to any claim under the policy.**
  - *Do the findings match your assessment of the behaviors?*
  - *Does the resolution work towards a healthy and respectful work environment free of bullying?*
  - *Is the outcome of the bullying free environment met through this process?*

- ✓ **Create a plan of communications with the member(s) to provide on-going support and guidance.**
  - *Remember that member(s) working in a bullying environment need consistent and frequent communications with the stewards as this will be an emotional and extremely stressful time, even after they file their complaint. They will not hear much from management during the process.*
  
- ✓ **Do not hesitate to contact the EAP (Employee Assistance Program) if you think they can help member(s) to cope through this experience.**
  - *We have had success when partnering with EAP as bullying does create a number of stressful and anxious environments for our member(s).*
  - *Check if there has already been an EAP representative assigned to this complaint process.*
  
- ✓ **Keep your notes throughout the process as your Regional Lead will be tracking your partner in tracking our experience.**
  - *We will be watching and documenting our member(s) experiences under the Respectful Workplace policy; driving discussions regarding issues that come up that will need to be addressed and outcomes/resolutions to a members allegation. Your Regional Leads are posted on the MAPE website and available through your Chief Steward.*
  
- ✓ **When hitting roadblocks or difficulties reach out to your Business Agent.**
  - *Along with your Chief Steward and other stewards, your Business Agent is an important source for strategizing and brainstorming!*