



IRCA Meeting Form: Checklist & Notes

Bring a notepad, pen, Local Contract/National Contract, and a copy of the Checklist and meeting notes form.

Explain the Investigatory Process to the Union Member before starting!

Please use both your notepad, checklist and forms to document the following information

Name of Union Member: _____ Date of Hire: _____

Contact Number: _____ Email: _____

L20 Bargaining Unit: CLS/MLT HH GC/GCC OD/OA Shift: _____

Meeting Date/Time: _____ Meeting Location: _____

LABOR CAUCUS- PREPARING THE MEMBER BEFORE MEETING

MEET WITH THE EMPLOYEE BEFORE THE MANAGER BEGINS QUESTIONING THE EMPLOYEE.

- **Coordinate time to meet** with the Member (~30 avg minutes for initial meeting, ~15 if continuation meeting/member who has participated in IRCA in past)
- **Introduce** self
- **Member Understanding:** Does the member understand why they are being called?
- **Get member's side/version** of incident (who, what, where, when, why)
- **Review Member History:** Does the Member have any active (within 1 year IRCAs)/Is the IRCA connected to the issue (attendance vs. lab error = different issues)
- **Reminders to the member**
 - Do not volunteer information
 - Keep answers short
 - Tell the truth!
 - Remind the member that they have the right to Caucus with Steward/Rep during

LABOR CAUCUS NOTES

Confidential – Internal to ESC L20 only
Please attach all Meeting Notes to this Document



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IRCA MEETING OVERVIEW

Name of Union Member: _____ Date of Hire: _____

Meeting Date/Time: _____ Meeting Location: _____

MANAGEMENT ATTENDEES:

Name: _____ Title: _____

Name: _____ Title: _____

UNION ATTENDEES:

Name: _____ Title: _____

Name: _____ Title: _____

MEETING SUBJECT (Alleged Issue):

Follow Up Meeting Scheduled: Yes _____ No _____ If YES, when? _____

PLAN/NEXT STEPS::

HAND OFF INFORMATION TO UNION REPRESENTATIVE ASAP (MAX OF 5 DAYS)

Date of Handoff: _____ Union Rep Name: _____

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Name of Union Member: _____ Contact Number: _____

Meeting Date/Time: _____ Meeting Location: _____

JOINT DISCOVERY/FACT FINDING/IRCA NOTES



WHO?



WHAT?



WHERE?



WHEN?



WHY?



HOW?
?



WHAT
ELSE?

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