Webinar on

# The Importance Of Documentation For Supervisors And Managers



#### **Areas Covered**

History Of Documentation

Formats of Documentation

*How Documentation impacts the Just Cause Standard* 

Alternative methods and legal challenges to Documentation

Documentation and the Employee's Right to Due Process

*The Importance of Consistent treatment and Documentation* 

Past Practices impact Documentation



Documentation is impacted by your Supervisors and Managers Past Practice in the Workplace.

#### **PRESENTED BY:**

Gerry McLaughlin, Ms. IR, is the author of "Negotiating" The Labor Agreement" His experience covers 40 years of successfully negotiating over 500+ labor contracts in varied industries as Executive Director and Vice President for Fortune 100 Companies and in areas, such as, but not limited to, Manufacturing, Distribution, Telecom, Retail, Healthcare & Senior Care, Food Services, Housekeeping & Facilities.

On-Demand Webinar Duration : 90 Minutes Price: \$200

#### **Webinar Description**

It is Important for Managers and Supervisors to understand the Importance of Documentation regarded their represented employees. It is critical for them to understand the impact and depth that Documentation has on multiple areas of the workplace and operation of the business.

One Key area of impact is the Just Cause Standard and how the failure to properly a document will result in the costly loss of Grievances and Arbitration cases. How Documentation impacts an Employees' Right of Due Process in the day to day operation of your business.

Failure to properly Document impacts the Disciplinary process clearly in the area of consistent treatment of employees. (Example: Billy, our best Employee punched his boss normally that's Termination but we want to issue a Written warning!)



Documentation is impacted by your Supervisors and Managers Past Practice in the Workplace. (Example: Smoking used to be a Verbal Discussion to File, yesterday we Suspended two employees for Smoking in non designated areas!)

This Webinar will address those main areas and much more to ensure that all members of the management team understand the proper methods, the reasoning for Documentation and the results that can be achieved in the Workplace as well as the costly errors that can be avoided.



## **Who Should Attend ?**

Managers, Supervisors Directors, Human Resources and Labor Relations personnel, Potential Supervisors or anyone with oversight responsibility of Represented as well as non represented employees.



#### **Learning Objectives**

We will discuss the" Five W's of Documentation. WHO WE DOCUMENT, WHAT WE DOCUMENT, WHEN WE DOCUMENT WHERE WE DOCUMENT AND TWHY WE DOCUMENT. The overriding goal is DOCUMENT for the continued success of your business NOT to make costly payments to Arbitrators, back pay to Employees, fees or fines to state or federal agencies, as well as Discriminatory agencies and private lawsuits. A discussion will be held covering the Impact of Documentation on Just Cause Standard and how to ensure proper treatment.

There are numerous styles of Documentation: Verbatim or "word for word", Narrative or "create the story", Outline format as an overview, or a fact listing, absent emotions/opinions. The styles of Documentation are listed in order of preference from top to bottom.

We will discuss the formats of Documentation, to include the usage of key language to support the Documentation, what form does Documentation take? Where is it filed? What can the Union have access to during their Grievance investigation or their Attorney in a Discovery process?

We will discuss the Disciplinary process which may consist of Verbal discussion(s), written letters and Suspension(s) and Final warnings leading to termination. The appropriate language needs to be utilized to effectively create any "verbal discussion" or discipline.

Solely mentioning that an employee is "going down the wrong road" doesn't meet the intent of a documented verbal discussion. Verbal discussions need to notify the Employee of his/her violation, what will happen in the immediate future should they fail to maintain satisfactory performance. A verbal discussion absents these above factors is not a Verbal discussion.



We will outline the proper content of Documentation, mention of only relevant facts all too often Supervisors and managers want to indicate the color of an employee's shirt, pants or sunglasses! NOT RELEVANT! Or they want to indicate their Knowledge WHY the employee did it! Again Not relevant, exclude Emotions and opinions!

Two key areas of discussion will be what does Documentation from a grievance look like? The Union is NOT entitled to any documentation before, during or after an Investigatory Interview, only leading up to or at the Grievance meeting. Can we ever "combine " Discipline together? What is Past Practice? How do I change a Past Practice?



### Why Should Attend ?

A Manager, Supervisor, or Director, or any member of the Management Team with the responsibility of managing or interacting with union-represented employees will benefit from this workshop.



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