

Guidelines

- Note taking is often a key to successful grievances. Be organized.
- Do not be afraid to slow the meeting down in order to catch up on your notes.
- Ask management for the list of questions to be asked of the member. If management refuses, slow the process down and make sure to write down all of the questions.
- Imagine that in five years someone is reviewing your notes. Will they be able to understand them?
- Write legibly. Review your notes post-meeting. Make sure to flesh out any missed details. Consider rewriting your notes if they are sloppy. (This can seem like too much work. However, it is worth it. Notes are worth their weight in gold!)
- Do not add personal commentary in your notes. Keep a separate document for theories, to do lists, etc.
- Be mindful of confidentiality. Notes contain sensitive information (e.g., medical, a member's disciplinary record, etc.).
- Be careful with the storage of your notes. Be careful who reads them and how they are used.
- Imagine your notes were presented at an arbitration as evidence. The more professional your notes, the more credibility they will have. You may be called to testify as a witness and speak of your notes.
- Develop a system for writing out your notes (e.g., wide margins, spaces between lines, coloured pens, etc.). Consider developing a template for taking notes to remind yourself of all the needed items.
- Use abbreviations for common terms to make note taking more efficient. (Make sure that you include a legend so that the abbreviations can be understood by someone else).

Make sure to include:

- Who is taking the notes
- Date, time, place, page numbers (e.g., 1 of 3)
- Who is in attendance at the meeting
- Who is speaking (use initials as developed at the beginning of your document)
- Times of breaks
- Document emotions (e.g., if a manager is irate, a member is crying, flippant, annoyed, etc.)

Don't be so concerned about your notes that you stop paying attention to the behaviours and body language of those attending the meeting. If the meeting is serious (e.g., could result in termination) consider bringing more than one union representative. One rep can focus on notes while the other actively participates.