

**AMERICAN POSTAL WORKERS UNION, AFL-CIO
POST CONVENTION WORKSHOP
LAS VEGAS, NEVADA
AUGUST 23, 2008**

William “Bill” Burrus, President

Joyce B. Robinson, Director Research & Education

**DEALING WITH DIFFICULT
PEOPLE**

Instructors:

National Business Agents Clerk Division:

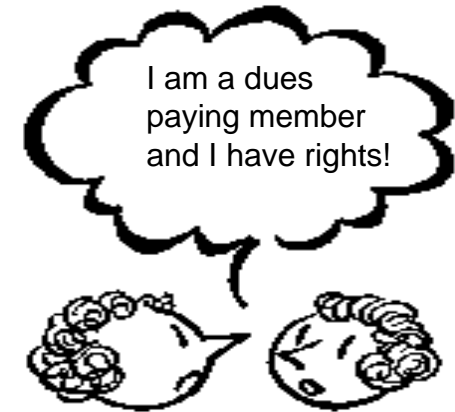
Shirley Taylor

Woodrow Williams

Marilyn “Mo” Merow

Pamela Richardson

Martin “Marty” Barron



INSTRUCTORS:

National Business Agents



Marilyn 'Mo' Merow



Shirley J. Taylor



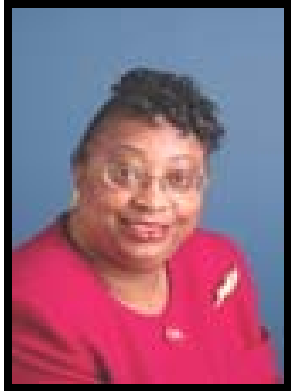
Woodrow Williams Jr.



Marty Barron



Pamela Richardson



**Joyce B. Robinson, Director
Research & Education Department**

SPECIAL THANKS TO:

**Joyce B. Robinson, Director
Research & Education Department
&
First Time Instructors of Psychology 101***



**Pat Williams *
Assistant Director, Clerk Division**



**Shirley Jean Taylor *
National Business Agent**



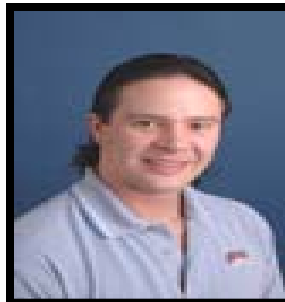
**Marilyn 'Mo' Merow *
National Business Agent
Author of Psychology 101**



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**Woodrow Williams, Jr. *
National Business Agent**



**Marty Barron *
National Business Agent**



**Brian Dunn *
National Business Agent**



PREFACE



(Dealing With Difficult People)

The Art Of Applying Diplomacy to the Unique and Often Difficult Situations That Union Officials Face

PURPOSE:

Enable you to be diplomatic while applying common sense to difficult situations;

To educate our membership that they are responsible for their actions;

To educate our membership that the union is not responsible for all of their problems;

RESULTS:

A change in the attitudes of the small, but vocal minority of the APWU Membership;

Channel negative energy into positive attitudes; Focus on what the Union has done for the Membership.

FOOD FOR THOUGHT

- We can't change people, but we can influence them.
- People don't respond to techniques, they respond to values, therefore, it is important to first look at your own values in applying techniques.
- When dealing with difficult people it is best to begin with the END in mind...

Thumbs-up From Past Participants



“Excellent- Excellent Class!”

-P. Prescott, Greater Forks #139

“Loved the inter active style of instruction”.

-T. St. Armour, Northern Vermont Local 57

“Keep today’s format of roll play and what steward should have done.”

-L. Helsel, APWU Local 735

“Thank you. This was great! I enjoyed this the most. It’s a great class that should be offered more.”

-J. Leachy, NOVA Local 6803

“Wonderful-Totally enjoyable-Loved the audience participation!! Make the class longer-us stewards really need sure ways to vent and sometimes even laugh at ourselves!!”

-S. Hood, Wichita Kansas Area Local

“Very informative”

-D. Culton, Tucson Area Local

“Great info Thanks! Wouldn't change a thing.:

-T. Muzzey, Las Cruces, Deming 402

“Great class! Really fun and great for us as stewards to hear that it's the same nationwide!”

-G. Hebert, Local 1477

“Good class. Thank you!”

-D. Lazano, Las Cruces, New Mexico

“Make the class an all day class”

-M. Scott, Oakland Local 78

“Role playing was great, but took too much time to set up. All in all, a great class!

-K. Hoppe, Akron Ohio Area Local

“Full day class for more participation of registrants. Good concept class anyway!”

-C. Thomas, Memphis Tennessee Area Local

“I would like to see examples with hostile supervisors.”

-P. Felton, 480-481 Area Local

“Sometimes we as steward and officers can be difficult people and need to react better. Something needs to be done about that.”

-L. Gosha, COAL

“We would like a role play on dealing with the non-union member who believes we have to represent them for free.”

-J. Payne, Salem Area Local #604

“Don’t allow grievant to yell at you, but don’t be rude to them. A grievance form given early gives them time to express themselves and blows off steam.”

-N. Jurman, NJAL

“Some problems can be resolved more in a labor management meeting. Poor staffing on the window, not enough change, not enough stamps, safety issues, etc.”

-S. Gajtka, Weirton Area Local

“Past EEO problems and grievance examples would be interesting, especially successes. Very good steward/member activities and role play.”

-A. Weyden, Local 7156 Pahrump, Nevada

“The role play in which the SSA was told by the steward to tell the customer “I don’t staff this place, I only work here,” has gotten Sass in trouble. I always tell the Sass to ask the customer who are upset if they would like to speak to management. They get paid to deal with the pissed off customers.”

-D. Barron, Tampa Florida Local 259

“Keep perfecting”

-D. Bailey, California Area Local

“Very good class!

-R. Reed, San Fernando Valley Area Local

“Instead of bringing and handing out tickets to get your volunteers, try after everyone is seated to pick a row like everyone in the first seat of each row or something like that.”

-J. Bradley, President Delaware Area Local #5885

“Loved the interaction. Next time have the scenario where the participants answer questions on their own, not pre-written. It would be interesting to hear the responses (smile). Had a ball!”

-J. Hunt, Greater Los Angeles Area Local

“Cut out Role Playing and get to the meat of the subject. Give guidance for dealing, not stories that don't give (give) much info. If time left, do role playing, not role playing then if we have time left we will go over the material.”

-D. Nelson, Tri County 423

“Make a problem box that people can write down problems we can discuss on a large forum, because my new stewards want to ask questions, but are afraid. I know there was many more who had that same problem. If you had a place they could let you know without them coming to a mike it would have been a big relief.”

G. Hoy, Long Beach

“Sometimes we as steward and officers can be difficult people and need to react better. Something needs to be done about that.”

-L. Gosha, COAL

“As a new steward -2 months and newer employee-1.5 years, I enjoyed this class. Thank you. Maybe as a suggestion offer this class more time, maybe once in the morning and session and another in the afternoon. Enjoyed this very much. Thanks again.”

-A. Riordan, Lubbock Texas

“See how to resolve and handle the difficult member. See more role playing on dealing with and resolving situations with difficult people who are abusive with stewards.”

-P. Mort, SFVAL

“Despite difficult member it is important to remember all the good you’ve done as a steward. The difficult member does not define your abilities as a steward.”

-J. Jenkins, Boston Metro

“Possible skit about employee who is intoxicated or under the influence. Role playing was very good. Great job!”

-J. Moore, New York Metro

“Excellent Class!! Can you include a segment about how to deal with difficult manager (SDO,MDO,SMDO) example: uncooperative, disrespectful, belligerent, etc.”

-A. Parrish, South Suburban 6591

“Incorporate a part II to include dealing with difficult management. This class was enlightening and I did learn from it.”

-P. Royster, Phoenix Arizona

“I enjoyed the class, but would have liked some help dealing with supervisors.”

-H. Mitchell, California Area Local

“The class was very informed. I think you for the input on the class!”

-M. Hill, Detroit District Area Local

“This would be a great subject but change the difficult situations on how to deal with a difficult or dishonest supervisor/manager. I know we could give a numerous amount of scenarios for this.”

-M. Sayoc, Wichita Ks. GMF

“Cell phone” “Use to be we had to give to COPA. So very few phones rang. All week the classes have had phones ringing and people talking on them, What’s up with that? This is very disruptive.”

-L. Davis, 6669 San Mateo

“If a steward has a problem after this conference we get more information through the web site.”

-A. Brown, Local 251

Do You Recognize These People?



The Passive Communicators

These people
never offer
ideas or let
you know
where they
stand.



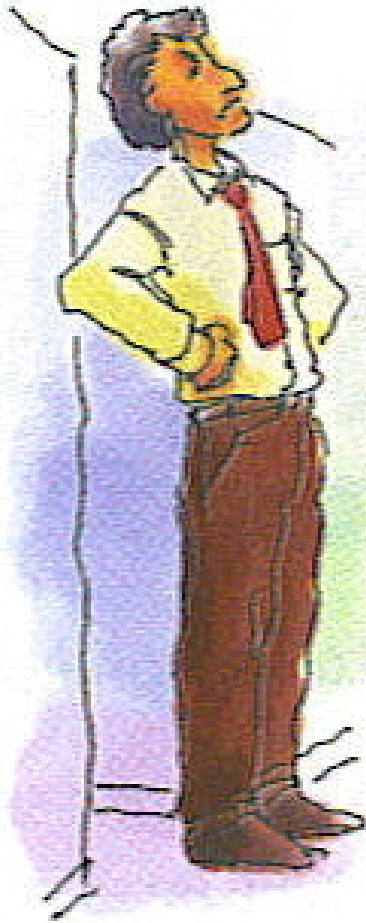
The Know It-Alls

They're arrogant and usually have an opinion on every issue.

When they're wrong, they get defensive.



The Dictators



They bully and
intimidate.

They're constantly
demanding and
brutally critical.

The 'Yes' People

They agree to any commitment, yet rarely deliver. You can't trust them to follow through.



The 'No' People

They are quick to point out why something won't work. What's worse, they're inflexible.



The Gripers

No real grievances!
Just 'Gripes

“Is anything ever right
with them?”

They prefer complaining to
finding solutions.



THE TWO MOST COMMON REASONS PEOPLE ARE DIFFICULT

- **LOW SELF-ESTEEM**
- **POOR COMMUNICATION SKILLS**

$$E+R=0$$

(IS HOW WE RESPOND TO EVENT)

➤ Event + Response = Outcome

WHAT DO WE NEED

- **SKILL**- is the ability/ expertise; proficiency
- **TACT**- the skill of handling difficult or delicate situations

NOTE: Tact = Diplomacy

CONFLICT

- **Occurs-** because of individual differences
- **Many conflicts arise-** from what you consider to be another person's difficult behavior
- **Conflict can be-** destructive and constructive

DESTRUCTIVE CONFLICT

- **Interferes-** with other important activities
- **Undermines-** morale
- **Hinders-** productive output
- **Obstructs-** goals and objectives of an organization

CONSTRUCTIVE CONFLICT

RESULTS IN:

- **Clarification** – understanding
- **Solutions** – How do we build them
- **Reduces** - Stress

ESSENTIAL COMMUNICATION SKILLS

- Assertiveness
- Listening
- Body language
- Conflict Management and Resolution

Conflict Management Vs Conflict Resolution

- To manage conflict is to maintain control
- Managing conflict does not necessarily eliminate it
- Everyone handles conflict differently
- Our effectiveness in dealing with conflict is largely dependent on how we choose to react to it.

How We Can Handle Conflict

- **Ignore-** and forget it
- **Strive-** to improve the relationship
- **End-** the relationship

NOTE: Every conflict is unique

FOOD FOR THOUGHT

- The most basic of all human needs is the need to understand and be understood.
- **If you always do what you've always done, this is what you always get -----**
- The best way to understand people is to listen to them.

WAYS TO IMPROVE YOUR LISTENING

- **Develop-** a desire to listen
- **Increase-** capacity to listen
- **Develop-** ability to evaluate what you hear

Communicative Skills

Passive Communicators

Don't always stand up for their rights

- Let others take shots at them

Try to avoid conflict

- Tend to become angry, hurt, disappointed

- Resent the other person

Note: This is not a healthy place to be

AGGRESSIVE COMMUNICATORS

- Get in people's faces –
 - 1) To maintain control
 - 2) To get the job done

NOTE: We don't have to hurt people to get things done.

ASSERTIVE COMMUNICATORS

- Standing up for their rights without violating the rights of any other person.
 - a) Have good listening skills
 - b) Show good body language

BODY LANGUAGE CAN BE EVEN MORE POWERFUL

The way you position your body:

- ❖ Tells others how available you are to interact
- ❖ Tells others how interested you are in what they have to say

DIFFUSING ANGER IN OTHERS

- Modeling behavior you want them to exhibit
- Sitting down
- Leaning forward
- Maintaining open stance to show interest
- Speaking softly and slowly
- Making eye contact, but avoiding staring

MINIMIZE THREATENING BEHAVIORS

- Avoiding personal space
- Avoiding pointing
- Maintaining confident body stances

INCREASE COMMUNICATION EFFECTIVENESS

Practice Some of the Following:

- ✓ Nothing Crossed – implies openness and honesty
- ✓ Leaning Forward - demonstrates interest
- ✓ Maintaining Eye Contact- builds trust

COMMUNICATIVE SKILLS

Passive _____ **Assertive** _____ Aggressive

UTILIZE ASSERTIVE COMMUNICATION

WHAT IS ASSERTIVE COMMUNICATION?

- It means appropriately and honestly expressing our views or feelings with another person while respecting the other person.

BASIC ASSERTIVE MESSAGE

- This is- what I think.
- This is- what I feel.
- This is- how I see the situation.

WHY I USE 'I' MESSAGES

- Not accusatory
- Show willingness to listen
- Show willingness to understand
- Agreeable solution

ADVANTAGES OF ASSERTIVE BEHAVIOR

- Equalizes the balance of power
- Establishes ones relationships with others
- Makes messages more clear and have more impact

NOTE: The problem is your problem!

CAN YOU NAME SOME?



Complainer

No acknowledgment

Overly-emotional

Have to have their way

Condescending

Interrupt

Disrespectful

Belittle

Confrontational

Rude

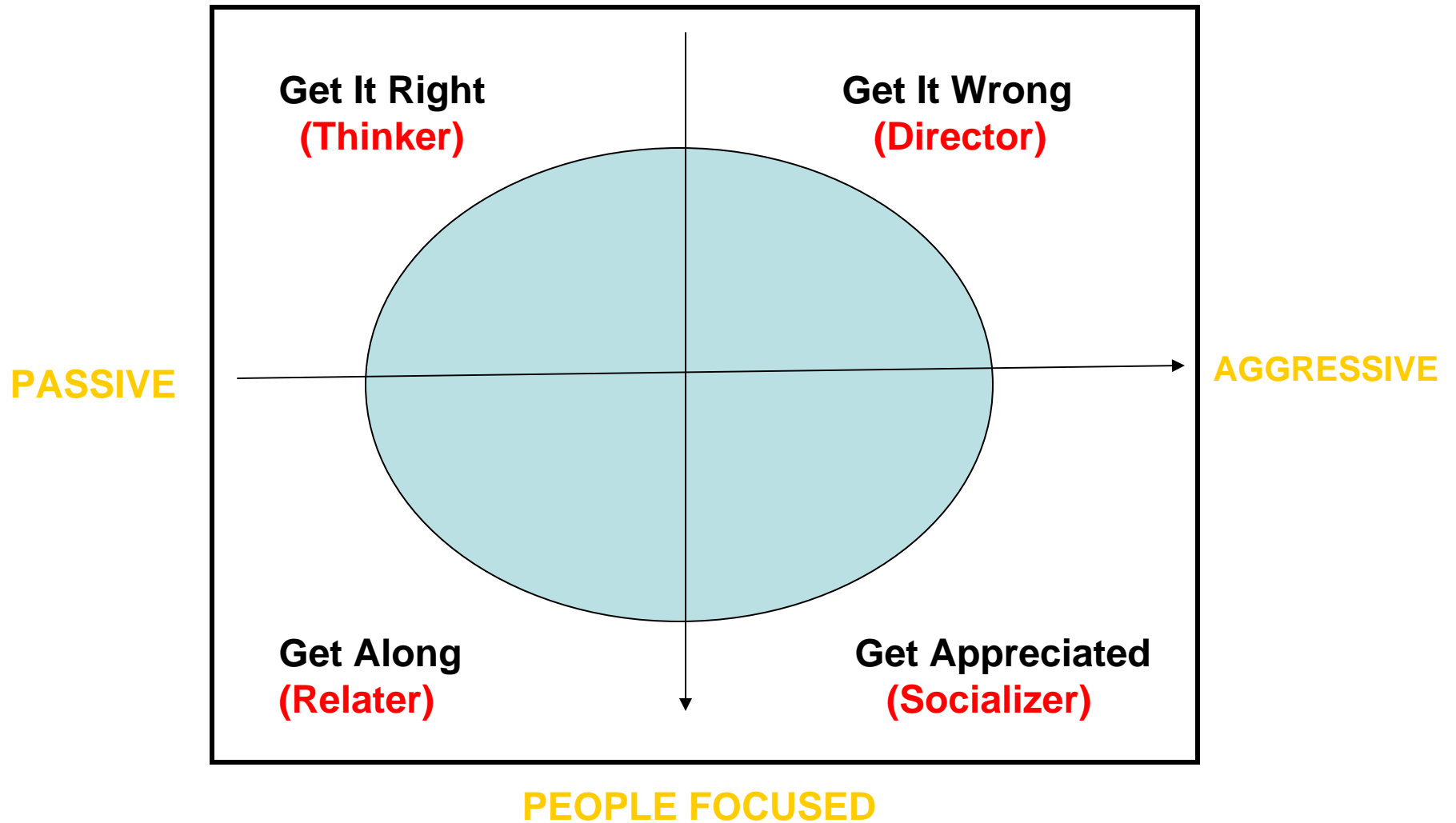
Judgmental

Non Listener

Impatient

THE FOUR QUADRANTS

TASK FOCUSED



NOTE: When a person's behavior goes outside the reasonable zone, challenges arise.

GET IT RIGHT
(Thinker)

Analytical, practical, least emotional,
Have list, poker face, Ha Ha person

Passive

GET ALONG
(Relater)

People person, your pain is his/her pain,
Dislike confrontation, often sensitive,
you hurt their feelings and won't be able
to know it.

Task Focus

GET IT DONE
(Directors)

Not by job title- very direct, driven,
accomplish task-on to next, continue to
Juggle, get it done person

Aggressive

GET APPRECIATED
(Socializer)

Think work is to be fun,
Accomplish task through party,
Talk about themselves, win
argument, creative out of box
Like to see reward.

People Focus

WHAT STEPS DO I NEED TO TAKE

- **Analyze how you-** behave with other people
- **Analyze how they-** behave with others

GET IT RIGHT PEOPLE

BEHAVIOR CHARACTERISTICS

- Focus on tasks
- Intend to 'get it right'
- Pay attention to details; think systematically
- Need to be correct
- Communicate indirectly and detailed

When Under Pressure

("Get it Right" People)

Tend to:

- ✓ **Become-** silent
- ✓ **Flee-** or withdraw
- ✓ **Exhibit-** negative behavior

EFFECTIVE BEHAVIORS OF “GET IT RIGHT PEOPLE”

- **They prefer-** clear instructions
- **They want-** adequate time
- **Want you-** to be responsive

What To Say In Tough Situations (Get It Right People)

Know your stuff-

Research your recommendations carefully. Get it right people are often subject experts, and to deal on their level you need to earn their respect.

Go step-by-step-

Example: “John, I’d like to explain to you how I came up with this information. First, I _____ **(first step in process)**, then _____ **(next step in process)**” _____ and so on.

Note:

These people want to get it right. Show them how, where, and why you got your information so they can see and understand your process.

GET IT DONE PEOPLE

BEHAVIOR CHARACTERISTICS

- **Focus-** on tasks
- **Intend to-** 'get it done
- **Focused-** direct, blunt
- **Need-** to be in control
- **Communicate-** directly and to the point

When Under Pressure ("Get it Done" People)

Tend to:

- ✓ **Raise-** their voice
- ✓ **Bully-** and take pot shots at others
- ✓ **Behave-** arrogantly

EFFECTIVE BEHAVIORS OF “GET IT DONE PEOPLE”

- **Get- Results**
- **Meet- Deadlines**
- **Gain- Profit**

EXTREME GET IT DONE BEHAVIORS

- **Tank People-** are motivated by an intense need to get things done
- **Snipers-** Exhibit sarcasm, rude comments, and exaggerated body language
- **Know-it-Alls-** are highly competent and knowledgeable people that know their stuff.

Note: They are assertive and excel in presenting their viewpoints

What To Say In Tough Situations

(Get It Done People)

Example:

Understand and support their goals.

“Emily, I understand that your goal for this issue is _____,
and I support you on (Find a point of agreement to build upon.)

Get to the point-

“To move us both closer to our goals, I’m proposing that we
_____ (Give a succinct synopsis of your recommendation.)

Be businesslike-

“To accomplish this would require that we _____,” (Be specific
about your needs, and back them up with facts.)

GET APPRECIATED PEOPLE

BEHAVIOR CHARACTERISTICS

- **Focus-** on people
- **Intend-** to 'get appreciated'
- **Display-** creativity, warmth, charisma, and energy
- **Need to be-** recognized and applauded
- **Communicate-** directly and elaborately

When Under Pressure

(“Get Appreciated” People)

Tend to:

- ✓ Talk more loudly and quickly
- ✓ Throw tantrums
- ✓ Exaggerate

EXTREME

“GET APPRECIATED PEOPLE”

- **Grenade People-** have a high need-crave-appreciation. May explode if not noticed.
- **Think They Know It All-** have a ravenous desire to be appreciated. They are aggressive and extremely people-focused.
- **Sniper People-** want the attention of people they like and admire. This need for attention results in sarcasm, rude comments, and exaggerated body language.

What To Say In Tough Situations (Get Appreciated People)

Example:

Be flexible-

Choose a time when the Get Appreciated Person is relaxed and open to discussion.

Be enthusiastic-

Remember these individuals seek appreciation. Begin your conversation with a sincere statement about something they do that you like. “Jay, I want you to know how much it means to me that you _____.” Then, when they’re feeling appreciated, describe the problem behavior that you’ve observed. “I also notice that when _____ happens you get very upset.”

GET ALONG PEOPLE

BEHAVIOR CHARACTERISTICS

- Focus on people
- Intend to 'get along'
- Behave in an agreeable, personable, friendly, caring, and helpful manner
- Need to be liked
- Communicate indirectly and considerately

When Under Pressure

("Get Along" People)

Tend to:

- ✓ Submit
- ✓ Accommodate
- ✓ Exhibit passive-aggressive behavior

EXTREME GET ALONG PEOPLE

- **Yes People-**

Extreme desire to get along with others. When confronted generally perpetuate 'yes' behavior.

- **Maybe People-**

Focus on 'getting along'. Decision making is extremely difficult because their decision may make someone unhappy.

- **Nothing People-**

Practice the belief that 'unless you have something nice to say, don't say anything at all.'

What To Say In Tough Situations (Get Along People)

Example:

Be casual and sincere-

Reinforce your interest in getting along with this individual. “Robert, I really enjoy _____ with you, and because of that, I’m hoping we can find a way to make that happen more smoothly.”

Slow down and listen-

Give them a chance to tell how they’re feeling about the issue. Ask clarifying questions until you understand their perspective well.

Make honesty safe-

Be open and patient. “Our relationship is important to me. I really want to hear what you think about this issue, good or bad.”

Build them up-

Reinforce to them how important it is to you that you both continue to get along. “It sounds like this may work better for both of us, and I’m so glad. It’s really important to me that we _____ well together.

FUNDAMENTALS FOR DEALING WITH DIFFICULT PEOPLE

- Prepare- do your homework
- Listen
- Identify priorities

**PUT DIPLOMACY AND TACT
INTO ACTION**

BEHAVIOR

STRATEGIES FOR DEALING WITH BEHAVIOR

Get It Right People	Know your stuff Go step-by-step Use facts, logic and structure Backtrack to address their concerns Turn the person into a mentor
Get It Done People	Understand and support their goals Get to the point Be business like Be task-oriented
Get Appreciated People	Be flexible Be enthusiastic Let them talk Use demonstrations
Get Along People	Be casual and sincere Slow down and listen/ Build them up Make honesty safe/ Set Goals

DEVELOP A PERSONAL ACTION PLAN

- Understand the problem / issue you're trying to resolve
- Develop goals and solutions to the problem
- Evaluate possible goals and solutions
- Make a decision
- Identify the steps you're going to take to achieve goals and solutions

(4) STEPS TO TAKE WHEN COMMUNICATING

1. Establish a direction- begin with the end in mind
2. Focus on the pattern of communication
3. Be flexible
4. Commit to a solution

COPING MECHANISM

- **Distance yourself-** from the behavior to help you think clearly and gain perspective
- **Change-** how you interact
- **Select an optimal time-** to confront the person(s)
- **Choose techniques-** that respond to specific difficult behavior
- **Understand-** the other person's point of view or point of reference

SAVE FACE

- **WHEN-** stakes are minimal, a lose-lose situation exists, or one of the parties doesn't want a confrontation
- **HOW-** use 'I' instead of 'You,' avoid backing your opponent in a corner, give the other person a way out.

Note: Face-saving skills allow you to leave a conflict situation not just unharmed, but depart gracefully.

IF YOUR EFFORTS DO NOT WORK

Difficult behavior can be:

- Intentional
- Aggressive
- Sustained
- Extreme

Note: If your efforts do not work, it makes
senses to seek help...Mediation/Arbitration

TEN TIPS FOR TELEPHONE

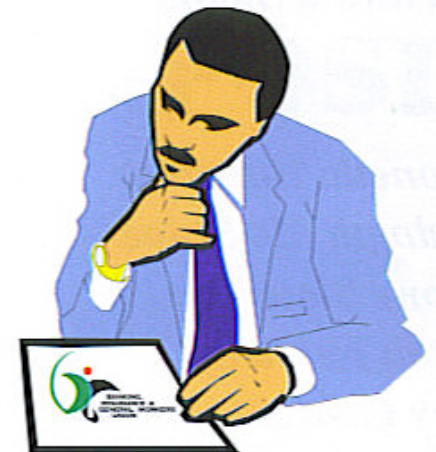
1. Speak professionally and calmly at all times
2. Do acknowledge their concerns-
3. Communicate desire to help resolve concerns
4. Repeat what they said- Gives you more mileage
5. Take notes-
6. Don't interrupt
7. Don't yell or use sarcasm
8. Don't disconnect the call
9. Don't leave them on hold indefinitely
10. Don't allow abusive behavior to continue



SHOP STEWARDS (REPRESENTATIVES)



APWU OFFICE



WHY WE NEED SHOP STEWARD

- They are one of the most important work floor figures
- The best Union Contract in the world is not worth the paper it is written on if it is not properly policed and enforced
- Article 17, Section 3: the parties recognized the mutual benefit of having Shop Stewards available during working hours to discuss problems and potential grievances with the Bargaining Unit

****Arbitration Decision N8C1EC24632**

Summed up the method for policing and enforcing agreements:

“...Stewards are the best vehicle for airing complaints, and resolving potential disputes to avoid escalating into grievances....”

ATTRIBUTES OF AN EFFECTIVE SHOP STEWARD

- Awareness of challenges he/she faces
- Desire to compete and achieve
- Courage to stand out among the crowd and be different
- Enthusiasm for creating new opportunities
- Ability to serve – Understands DFR

Union Representatives

Often employees ask for our assistance in issues that are not contractual violations, but instead:

- Valid complaints
- Personality conflicts
- In some cases gripes

The member is often

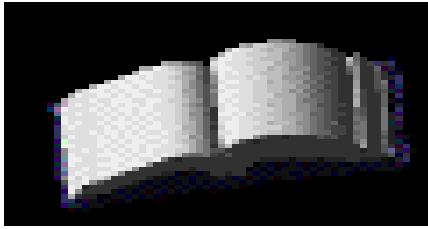
- Angry
- Hostile
- Demanding

Their solution is

- Often self serving

SECTION 1: DFR





DFR

**IS REQUIRED OF ALL
SHOP STEWARDS/ OFFICERS**

Duty of Fair Representation- Derives from Section 9(2) of the National Labor Relations Act (NLRA) and Section 2 of the Railway Labor Act (RLA).

The First Supreme Court decision reg. duty of fair representation was *Steele Vs. Louisville & Nashville Railroad*, a case under the RLA.

Workers increasingly bring lawsuits against their union and employers outside the normal channels of dispute settlement .

Most generally, the claim of performing their duty in a capricious or perfunctory manner is the charge against the union.

DFR AND THE UNION

➤ The Union is vested with responsibility to represent:

All employees (members and non members) to the BEST of its ability.

➤ Duty of Fair Representation dictates that:

No union official may represent an employee in a capricious, perfunctory, arbitrary or bad faith manner.

- **Arbitrary**- Shop steward doesn't have an explanation why he/she failed to appeal the grievance.
- **Capricious**- Shop steward has a reason why he or she did not appeal the grievance, but the reason is not logical. (i.e. it ended in #5)
- **Perfunctory**- Shop steward does not conduct a proper investigation before closing the case and puts forth little or no effort to determine the facts.
- **Bad Faith**- Shop steward allows personal feelings, union politics or bias to interfere with the representation of the employee.

Rights of the Employee Under DFR

- To clear and unquestionable terms of the CBA. Union cannot refuse to follow or enforce the rules and standards that it has established on behalf of B.U. employees.
- To have his/her grievance decided on its own merits. Union is in violation when it trades a meritorious grievance, to secure a benefit for another individual or group of individuals

Rights of the Union Under DFR

- Has no duty to process frivolous grievances, and it **must be free to settle a grievance in accordance with any reasonable interpretation.** However, in settling disputes, similar complaints should be treated consistently.
- **Steward** can make good faith judgments in determining the merits of a grievance, but **must use reasonable care and diligence in investigating, processing and presenting grievances on the employee's behalf.**

WEINGARTEN/MIRANDA RIGHTS

Federal labor law gives employees the right to representation during investigatory interview which the employee reasonably believes may lead to discipline.

Originated in NLRB v. J. Weingarten, U.S. Supreme Court 1975, Commonly called "Weingarten rule" or "Weingarten Rights."

Weingarten only applies to an investigatory interview when management is searching for facts relevant to determining an employee's guilt or deciding whether to impose discipline.

Weingarten rights do not apply when management issues a disciplinary action to an employee.

(For example, issuing an employee a letter of warning).

Steward cannot exercise Weingarten Rights on the employee's behalf, unlike "Miranda rights," which involve a criminal investigation.

Management is not required to inform the employee of the Weingarten rule.

Weingarten rule includes the right to a pre-interview consultation with a steward.

Federal Courts have extended this right to pre-meeting consultations to cover Inspection Service interrogations.

(Postal Service v. NLRB, D.C. Cir. 1992).

Employee has right to steward's assistance, not just a silent presence during an interview covered by the Weingarten rule.

Employee's Weingarten rights are violated when union representative is not allowed to speak, or is restricted to the role of a passive observer.

Although ELM, Section 666.6 requires all postal employees to cooperate during investigations, an employee with Weingarten rights is entitled to have a steward present before answering questions.

The employee may respond that he or she will answer questions once a steward is provided.

SECTION 2: GUIDELINES FOR UNION OFFICERS/STEWARDS

- ✓ **FIRST-** INTERVIEW THE GRIEVANT
- ✓ **SECOND** – INTERVIEW INDIVIDUALS MENTIONED BY GRIEVANT
- ✓ **THIRD** – FULLY INVESTIGATE EACH COMPLAINT
(Who, What, When, Where, Why & How)
- ✓ **FOURTH** – NEVER ASSURE CASE WILL BE ARBITRATED
- ✓ **FIFTH** – ALWAYS KEEP GRIEVANT INFORMED
- ✓ **SIXTH** – IF DECISION NOT TO PROCEED INCLUDE REASON IN FILE
- ✓ **SEVENTH** – KEEP FILE DOCUMENTED
- ✓ **EIGHTH** – DISCUSS YOUR DECISION OF THE GRIEVANCE
- ✓ **NINTH** - RETAIN CASE FILES FOR MINIMUM OF THREE (3) YEARS

1st

INTERVIEW THE GRIEVANT

- Interview grievant , especially in discipline cases.
- Keep precise notes of interview
- Get a written statement from grievant and/or witnesses

2nd

INTERVIEW WITNESS (S)

- Interview each witness
- Question them fully
- Keep precise notes
- Have witness sign and date statement

3rd FULLY INVESTIGATE EACH COMPLAINT

- Investigate while on the clock
- If denied, file a grievance
- Include the information on the grievance

4th NEVER ASSURE CASE WILL BE ARBITRATED / WON

- Never assure grievant the case will be arbitrated
- Never assure grievant that they will be appealed and **won**
- We can never be certain of the outcome of a case

5th ALWAYS KEEP GRIEVANT INFORMED

- Keep grievant informed of progress
- Notify them in writing of different steps taken in grievance process

**6th IF DECISION
NOT TO PROCEED
KEEP REASON IN FILE**

- If decision is not to proceed with case include a statement in file
- If you settle the case, include a statement of reason in file

7th

KEEP FILE DOCUMENTED

- File should include relevant documents:
 - a) Copy of document notifying grievant of decision to drop case in file;
 - b) Copy of Certified Notifications to grievant and other pertinent documents

8th

DISCUSS YOUR DECISION OF THE GRIEVANCE

- A review committee or grievant committee should be established
- Each issue should be fully discussed
- Seek additional advice or counsel, if necessary

9th

RETAIN CASE FILES FOR MINIMUM OF THREE (3) YEARS

- Retention time of files or grievances should be established
- Statue of limitations has been established by Supreme Court as six (6) months
- Closed files may also be retained with an adequate retrieval system

A STEWARD'S NEED FOR REPRESENTATION

A Steward may need representation. There is an official policy position from the American Postal Workers Union on this issue:

Article 15 states- “The employee shall be represented by a steward or a union representative. The APWU interpretation of the foregoing part of Article 15, is that the Steward or Union Representative could also be the grievant and represent himself or herself.”

Yet, it is not recommended to represent ones' self!!!

FOOD FOR THOUGHT

- Officers and Stewards are discouraged from automatically appealing every case
- We are not required to be right in every case
- You may be called upon to prove that your decision was not careless or perfunctory