



GUIDE TO GRIEVANCES

In Arizona Schools



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(877) 828-1983



Introduction

The Arizona Education Association (AEA) is committed to helping our locals build capacity to effectively address workplace problems at the building or site level. AEA's Advocacy Center has created this guide to help members and locals understand and work through the grievance procedure. Whether you are a building representative or an individual member, this manual can guide you step-by-step during the grievance process. It includes the typical definition of a grievance and information on how to follow timelines, prepare the grievance, process the grievance, and work with management to solve workplace problems.

If you need additional information or assistance with the grievance procedure, contact your Organizational Consultant or arizonaaea.org/helpdesk.

The Arizona Education Association thanks the Communications Workers of America and the Illinois Education Association for their assistance in creating this grievance guide.

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What is a Grievance?

Often employees have a “complaint” and immediately want to file a “grievance.” It is important to know the distinction between the terms. A complaint expresses concern about a workplace situation. It could be just a gripe or a serious protest about an act adversely affecting an employee. A grievance is a formal way to air an unresolved complaint. Many complaints are settled with a discussion between the employee and the immediate supervisor. The complaint becomes a grievance only if it is not settled at this level.

Although Arizona law does not require school districts to have grievance policies, most districts have a grievance policy. The most common definition of a grievance is a claim that there has been a violation, misinterpretation, or misapplication of district policy, rule, or regulation governing or affecting the employee’s terms and conditions of employment. Terms and conditions of employment include the hours of employment, compensation (including fringe benefits), and the district’s personnel policies directly governing or affecting the employee.

Some districts have a broader definition of the term grievance. For example, in districts with a meet-and-confer or bargaining agreement, a grievance might include a claimed violation, misinterpretation, or misapplication of an agreement provision. In a few districts, a grievance includes a claim of inequitable treatment. **Always check your district’s policy for the definition of a grievance.**

The purpose of the grievance policy is to provide a method for good communication among the district employees, the administrative staff, and the Governing Board. A clear process is essential for facilitating constructive solutions to workplace problems in an atmosphere of courtesy and cooperation to enable the effective operation of the schools. The Governing Board usually establishes a grievance procedure as the prescribed means of resolving workplace issues at the earliest possible date and the lowest possible level. These issues may involve one employee (such as protesting a denied promotion) or many employees (such as clarifying a policy).

The Association’s Interest in a Grievance

Processing grievances can be an important tool for the local association and can serve many purposes, including:

1. Protecting employee rights under the district’s policies, rules, and regulations and perhaps the meet-and-confer agreement or other documents.
2. Ensuring consistent and fair treatment of employees.
3. Establishing the Association as the advocate for the employees.
4. Helping the administration realize the significant role the Association plays in solving problems and maintaining employee morale.
5. Building respect for the Association’s commitment to positive action.
6. Increasing the role of the Association in policy decision making. Eventually, administrators will begin to check with you before they make decisions to avoid having grievances filed. You also may have the opportunity to be involved in negotiating policy changes as a result of successful grievances that identify problematic policies.
7. Advancing Association interests through increased membership and improved policies, rules, and regulations.
8. Establishing precedent-setting resolutions that help other employees. Grievance remedies may become the district’s practice.

For any grievance in which the Association is involved, there are legitimate interests of the administration, the grievant, and the Association to be considered. Don’t forget to include consideration of the Association’s interests in every grievance action you contemplate.

The Steps in a Grievance Procedure

Grievance procedures usually have several steps, beginning with an informal level and proceeding with several levels of review or appeal. It is important to know the sequence and timing of these levels. **Remember to check your district's grievance policy.** Most districts have their policies on the Arizona School Board Association website at www.azsba.org. Grievance policies are in the G policies.

Are timelines important?

Yes – **timing is critical.** Failure to bring the issue up within the specified amount of days according to your district policy waives your right to a grievance. Failure to process a grievance to the next level within the time limits may be acceptance of the decision, and you may lose the right to appeal the decision to the next level.

What is a day?

Timelines are measured in “days,” and most district policies define a “day.” For example, a day could be any day in which the schools of the district are operating. A day also could be a calendar day. Always check the definition, which may be in a different section of the policy.

Right to representation

An employee usually may be accompanied by a person of his/her choosing when a meeting is held on a grievance. Some grievance policies limit the participation of lawyers. For example, a lawyer may not be allowed to represent the employee at the informal grievance level. If you bring a lawyer, the school district will insist upon having its lawyer present.

Informal Level

Before filing a formal grievance, an employee usually must attempt to resolve the problem with the immediate supervisor through a meeting. More than one informal meeting is possible, but the first meeting usually must be within the number of days specified in policy after the employee knew or should have known of the problem. Any subsequent conferences at the informal level must be held prior to the deadline for filing a formal level grievance.

Formal Level

If the result of the informal meeting is not satisfactory, the employee may initiate the formal grievance, which usually has at least two levels of review.

Level I

Written Grievance to Immediate Supervisor: Within the number of days specified in policy from the last informal meeting, you must present the written grievance to the immediate supervisor. Many districts require a particular form, which includes a statement of the policy violated, the decision at the informal level, and the remedy sought. A sample format is included in the Appendix.

Response to Grievance: The immediate supervisor must communicate a written decision regarding the formal grievance to the employee within the number of days specified in district policy after receiving the grievance.

Note: Check your district policy to determine whether either party may request a face-to-face conference during the supervisor's response time. Think about whether this conference could help resolve the matter as face-to-face communication is usually most effective.

Level II

Appeal to Superintendent: Within the number of days specified in policy of receiving the immediate supervisor's decision, you may appeal to the superintendent or designee if not satisfied with the supervisor's decision. The grievance policy usually requires the appeal to include a copy of the original grievance, a copy of the immediate supervisor's decision, and a clear and concise statement of the reasons for the appeal.

Check your district policy to determine whether the superintendent holds a hearing to get additional information about the grievance. Find out if the superintendent will just meet and attempt to resolve the matter.

Response to Appeal: Within the specified number of days of receipt of the appeal, the superintendent or designee must issue a written decision.



Level III

Some school districts provide another appeal level.

Appeal of the Superintendent’s Decision: Within the specified number of days of receiving the superintendent’s decision, you may appeal, in writing, to the Governing Board.

Response to Appeal: The Governing Board reviews the appeal and issues a response within the number of days specified in policy. Often the Board reviews the matter “on the record,” without taking additional information or comment from the grievant. Check your district policy to determine whether the Board holds a hearing or simply reviews the written documents from Levels I and II.

Some local associations have obtained arbitration as an additional step of the grievance process. An arbitrator usually is a trained third party who provides an impartial review of the grievance. The arbitrator’s decision is only a recommendation, however, which the Governing Board considers in making a final decision on the grievance. A sample grievance checklist for the various levels is included in the Appendix.

Note: For most grievances, the Governing Board’s decision is the final step of the process. Although the grievant could seek judicial review of the Board’s decision, such lawsuits are extremely time-consuming, difficult, and expensive. The Legal Defense Guidelines severely limit what litigation AEA might fund. A judge would review the record and decide whether the Board’s decision is arbitrary and capricious or an abuse of discretion. Judges rarely overturn a Board decision if there is any rationale.

Confidentiality

Certain kinds of conversations are legally confidential. For example, conversations between an attorney and client, between a doctor and patient, or between spouses are “privileged.” This means that neither party to the conversation may discuss what is said or be compelled to disclose what is said.

In contrast, discussions between you and the grievant are not legally confidential. Nevertheless, you should try to maintain confidentiality as an essential part of the grievance process. All parties involved in resolving the problem, including the Association representative and the grievant, should keep confidential all discussions related to the grievance.

A valuable way to remember the importance of confidentiality is to put yourself in the place of the person you are assisting and ask yourself if you would want this information shared about you. A grievance is a confidential matter.

Steps in Handling a Workplace Problem

Step 1 – Investigating the Problem

When a member comes to you with a workplace problem, you must gather some basic information. Interviewing the member is the first step of the investigation process. The Association representative’s first job is to listen as the member expresses his or her feelings about what happened. The following “Listening Ladder” is a tool for developing effective listening skills.

LISTENING LADDER

- L Look** directly at the person talking. Use your eyes. Concentrate on the other person.
- A Ask** open-ended questions like “Tell me about it,” or “How did you ...?”
- D Don’t** interrupt.
- D Don’t** change the subject.
- E Emotions.** Check yours. Hear others first. Don’t overreact, argue, or jump to conclusions.
- R Be a responsive** listener. Body language says a lot. Lean forward, maintain eye contact, and use head and hand gestures to indicate empathy and understanding.

Be aware when you have “tuned out.” Check yourself to see if you can repeat what you have heard. If not, your mind wandered. Concentrate on what is being said.

Use the interview to get as much information as possible. A sample interview worksheet is included in the Appendix. Recordkeeping is important. You and your local association should decide who keeps copies of the interview worksheet and other grievance documents. For example, decide whether the Association President or a Grievance/Advocacy Chair should receive copies. The Association should establish a system for keeping track of grievances.

Answers to the following questions usually provide useful information.

1. *What is the problem?*
 - Briefly describe the member’s issue or concern.
 - What happened?
2. *Who is involved?*
 - Administrator or Supervisor
 - Witnesses
3. *Where did the problem occur?*
 - State the exact place the incident occurred.
 - Be specific (in what group, in which building, etc.).
4. *When did the problem occur?*
 - Be specific (date, time, shift, week, year, etc.).
5. *How has the member been affected?*
6. *How should the problem be solved?*
 - Include the “remedy” or desired outcome of the possible grievance.
 - Brainstorm, and be sure to include all possible reasonable remedies.

The following questioning techniques are helpful in interviewing the member:

1. **Ask open-ended, short questions.**
 - Can you tell me how this dispute started?
 - How do you see the problem?
 - What are possible solutions?
 - What do you see as alternatives?
 - Don’t ask “Why?” Say, “Help me understand.”
2. **Use reflective responses.**
 - Sounds like you
 - I get the impression
 - What you are saying is that you
 - I am hearing you say that you feel
3. **Use clarifying statements.**
 - What do you mean by ...?
 - Are you saying that ...?
 - Let me see if I understand what you are saying
4. **Use summary statements.**
 - From what you are saying, I have heard two things
 - You mentioned at least two possible options
5. **Use silence to think and listen.**

Give the member time to think about the answer to a question.
6. **Ask the member if there is anything else about this situation you should know.** Explain that it is better to be prepared than surprised with new information during the grievance process.

Some points to remember while interviewing:

- Be objective, not judgmental.
- Request relevant evidence.
- Take notes.
- Avoid personal involvement in the issue.
- Do not commit the Association to a course of action.

A checklist of interviewing tips is included in the Appendix.

Sometimes it’s helpful to have the member write his/her own statement of what happened. A sample form is included in the Appendix.

Step 2 – Determining Whether the Problem is a Grievance or a Gripe

The following questions will help determine whether to file a grievance.

1. Is the problem within the scope of the definition of a grievance? Does it involve a violation, misinterpretation, or misapplication of a district policy, rule, or regulation?
2. Which policy, rule, or regulation was violated? Are there any other applicable or related policies, rules, or regulations?
3. Is it timely?
4. Is the language of the policy clear? If the language is ambiguous, is there a past practice, negotiations history, or other evidence of what the policy means?
5. Has the Association submitted grievances in similar situations?
6. What written evidence is there?
7. Are there credible witnesses? Find out:
 - What do they know?
 - How do they know it?
 - What statements did they hear? From whom?
 - Where were they when they heard the statements?
 - Did they see the incident?
 - How far away were they?
 - What did they see?

Interview the witnesses separately and note inconsistencies in the stories. Talk to as many people as possible who may have witnessed the incident or are able to verify facts surrounding the grievant’s story.

It may be helpful to have each witness read and sign a written statement of the interview.

8. What remedy is sought? Is there a remedy that addresses the harm?
9. What is the effect of a win?
10. What is the effect of a loss?
11. How important is the issue to the Association?
12. Does the case have merit?
13. What are the chances of winning the case?
14. Can the problem be solved in another manner?
15. Is the Association required to file a grievance on behalf of the member?

Step 3 – Preparing for Informal Level Discussion

Prepare for a discussion with the immediate supervisor by knowing the relevant facts and the basis for the grievance.

Try to anticipate the supervisor’s side of the story and understand his/her viewpoint. Be prepared to respond to the supervisor’s interests in the situation.

Be prepared to listen for areas of possible agreement to a solution.

A sample worksheet is included in the Appendix.

Decide whether the grievant is going to participate in the presentation of the case. Prepare the grievant to answer questions carefully. These tips for witnesses, which appear in the AEA Advocacy booklet *Tips for Witnesses* are helpful:

1. Listen carefully to the question.
2. Answer only the question that is asked.
3. Answer in as few words as possible.
4. Ask for an explanation if you don’t understand the question.
5. If you don’t remember or know the answer to a question, don’t guess or make up an answer.
6. Ask for a break if you become tired, flustered, intimidated, or confused.
7. Always tell the truth.
8. Don’t volunteer information.

Step 4 – Presenting the Informal Level Grievance

Two possible options are available to present the informal level grievance to the immediate supervisor.

1. State the grievance as clearly and completely as possible. When the supervisor is cooperative, this method is probably best. If you present your facts completely, you can expect that the supervisor will understand and do his/her best to protect the grievant.
2. Try to get the supervisor to state his/her side of the story first. When the supervisor is less than cooperative, you might want him/her to speak first.

Here are some tips for a productive discussion:

1. **Organize your presentation effectively.** Have an outline and present the positive information first. Decide what exhibits you need and have copies for the Supervisor. Do your best to stay on the subject.
2. **Determine your opening and bottom-line demands.** Have the member think about possible remedies. Make sure you have authority to settle the grievance, and be firm when necessary. While it’s often important to stick to your guns, you also need to recognize when compromise or settlement is advisable.
3. **Anticipate problems.** Think about various contingencies. For example, what will you do if new “bad” facts are identified?
4. **Always be professional.** Be an advocate and believe in your case, but never lose your temper. The grievance representative who loses his/her temper loses the ability to think and communicate clearly. Disagree in a calm, firm manner.
5. **Take breaks, if necessary.** If you and the member disagree during the meeting, ask for a break and work out the problem in private. Breaks also can be used to calm down the member or review new information.
6. **Explain why a resolution is best.** Give the Supervisor sound reasons for resolving the grievance at this level.
7. **Decide how to document any resolution.** If you and the Supervisor agree on a remedy, confirm it with a letter, e-mail, or other documentation.
8. **Confirm next steps.** If you and the Supervisor don’t agree on a remedy, clarify the deadlines and procedures for the next grievance level.

A checklist of tips for presenting the informal level grievance is included in the Appendix.

It's helpful to make a written record of the informal meeting. A sample form is included in the Appendix. Again, decide who should receive copies of this form.

Step 5 – Writing the Formal Level I Grievance

Complete the grievance form accurately and completely. Most grievance forms contain three elements:

- 1) A concise statement of the issue;
- 2) What policy violations have occurred; and
- 3) A statement of the remedy requested.

A sample form is included in the Appendix. Again, decide who should receive copies of this form.

Provide enough information so that the supervisor understands:

- What the basic problem is;
Example: Grievant was wrongfully denied a promotion.
- What policy violations have occurred;
Example: The district failed to comply with Policy GDP on support staff promotions. The position was not offered to current employees, and grievant's seniority was not considered.
- The remedy to solve the problem.
Example: Grievant should be made whole in every way, including payment of all the wages and benefits of the denied promotion retroactive to the date the grievance was filed and placement in the next available vacant position.

Make it easy for the supervisor to understand what happened. Organize the facts in a logical manner. Usually it is helpful to tell the story in chronological order. Emphasize the important facts, and use separate paragraphs for each new idea. Avoid extreme statements, profanity, and unfounded accusations. Add a plea for fairness.

Look up all relevant policies, and be sure that you have a complete and current version of each policy. The most up-to-date policy book often is at the district office, maintained by the governing board secretary, the superintendent, or the personnel director. Some districts also have policies available on the Internet.

District policies are public records. Districts must make public records available upon reasonable request, and they may charge a reasonable amount for photocopying. Attach copies of relevant policies to the written grievance.

Many districts belong to the Arizona School Boards Association ("ASBA"), which publishes sample policies. The policies that are most often involved in grievances are found in Section G, Personnel, in the ASBA format. See: www.azsba.org on the Internet. Note that districts may not have adopted all of the ASBA policies, however. Get a copy of your district's index of personnel policies to use as a reference.

Consider the following points when stating the remedy requested:

1. How has the grievant been affected?
2. What harm has been done?
3. What will resolve the problem?
4. Anticipate the district's interest.
5. Identify multiple remedies.
6. Is it feasible?
7. Don't expect an apology.
8. Think of a win that permits the other side to save face and still meets the grievant's interests.

Brainstorm all possible remedies and then choose the one(s) to request in the written grievance. The remedy must be one that fixes the problem or resolves the issue. It cannot violate or change policy—you can't fix a violation with another violation.

Finally, if time permits, ask an association leader, grievance chair, or AEA Organizational Consultant to review the written grievance. Ask them for any suggestions to make the grievance easier to understand or more persuasive. Ask them for other possible remedies.

Note: School districts usually have separate policies and procedures for handling discipline matters. Many of the skills used in processing a grievance are helpful in appealing proposed discipline.



Follow-Up

Be aware of some “follow-up” steps after completion of the grievance process.

1. Check in with the member. If the grievance obtained a remedy, was that remedy provided?
2. If the grievance was unsuccessful, how is the member doing? Is there another solution to the problem? For example, would a transfer help? Is there another procedure for solving the problem? Refer to the following section entitled “What Kind of a Problem is It?”
3. Use a recordkeeping system to track the number of grievances on the same policy violation.
4. Does the grievance result show a need to negotiate changes or modifications in district policy?
5. What has been gained by the grievance?
6. Identify the win for the Association and how to communicate the win, while maintaining confidentiality.

What Kind of a Problem is it?

This guide deals with grievances. Note, however, that workplace problems may involve other procedures. It is important to analyze the problem, identify what methods are available for solving the problem, and then develop a strategy for solving the problem.

1. Does the problem involve a violation, misinterpretation, or misapplication of a district policy, rule, or regulation? Is it within the definition of a grievance?
2. Does the problem involve a violation of federal or state laws? For example, was there discrimination based on race, national origin, religion, sex, age, or disability? Harassment based on these characteristics is a form of discrimination.
3. Does the problem involve getting assistance to enable an employee to do his/her job? For example, is a request for “reasonable accommodation” under the “Americans With Disabilities Act” needed?
4. Does the problem involve disclosing a violation of law, waste of monies, mismanagement, or abuse of authority? Disclosing this information is “whistleblowing.” **See:** A.R.S. Section 38-532 for requirements.

5. Is this a question of fair and equitable treatment? Does the district have some other “complaint” procedure?

Gather information about the problem and brainstorm possible solutions. Consider trying to resolve the problem informally through discussions with co-workers, the immediate supervisor, or other administrators. Usually, you should follow the “chain of command” unless the problem is very serious.

Building representatives should try to resolve all legitimate complaints. Involving the member in determining the solution helps the Association build capacity through collaborative problem solving. When the problem is not grievable and involves legal issues like making a discrimination complaint or whistleblowing, seek assistance from AEA Legal.

Most assistance to AEA members is provided by volunteer local leaders and AEA Organizational Consultants. AEA Organizational Consultants are paid professional staff who serve local association members and leaders. They provide training, consultation on local association issues, assistance to individuals, and assistance to local associations during meet and confer. AEA also provides a variety of seminars, workshops, and training materials to assist members and local associations with educational employment concerns.

The AEA Defense Fund primarily provides legal representation to defend members in adverse job actions initiated by their employers, such as dismissal hearings and certificate disciplinary proceedings. For other employment-related legal problems, AEA Organizational Consultants can refer members to the AEA Legal Team for a brief initial consultation to help explain legal rights and options.

Resources

1. AEA Advocacy Center booklets, which are available through the Organizational Consultant or the AEA Legal Team.
2. Arizona Revised Statutes, which also are found at www.azleg.gov
3. Other Local Association Leaders and Grievance Representatives at other sites
4. AEA Organizational Consultant
5. Visit arizonaaea.org/helpdesk
6. AEA General Counsel (in serious cases) like dismissal, nonrenewal, suspensions of over 10 days).



Grievance Checklist

- Meet with member; fill out interview form.

Date completed: _____

- If grievable, schedule informal meeting with supervisor within the specified timelines of your district policy.

Deadline for informal meeting: _____

Date of informal meeting: _____

Date of informal decision: _____

- If the supervisor fails to resolve the situation, present the formal Level I written grievance.

Deadline for Level I grievance: _____

Date Level I filed: _____

Deadline for Level I decision: _____

- If the supervisor's Level I decision is not satisfactory, submit the Level II grievance to the superintendent or designee.

Date Level I decision received: _____

Deadline for Level II grievance: _____

Date Level II filed: _____

Deadline for Level II decision: _____

- If the superintendent's Level II decision is not satisfactory, submit the Level III grievance to the Governing Board.

Date Level II decision received: _____

Deadline for Level III grievance: _____

Date Level III filed: _____

Deadline for Level III decision: _____



Worksheet for Association Representative

Date: _____

Member's name: _____

Position: _____ School/site: _____

Home address: _____ Email address: _____

Work phone: _____ Home phone: _____

1. **WHAT** is the issue/concern? _____

2. **WHO** is involved? _____

Administrator/Supervisor: _____

Witnesses: _____

3. **WHERE** did the incident occur? _____

4. **WHEN** did the incident occur? _____

Within grievance timelines? _____

5. **IS** the incident grievable? _____

WHICH policy was violated? (Cite specific section(s) of policy) _____

6. **HOW** has the member been affected? _____

7. **WHAT** resolution does the member seek? _____

8. **DOES** the member want to file a grievance? _____

9. **COMMENTS:** _____

Name of Association Representative: _____

Work phone: _____ Home phone: _____

Original to: Association Representative

Copies to: Association President Grievance/Advocacy Chair Association Grievance File





Interviewing Tips

I. Purpose of the Interview

- Gather general background information.
- Gather information about the incident.
- Develop rapport.
- Clarify expectations/roles.
- Inform about procedures and options.
- Lessen the risk of unpleasant “surprises.”
- Determine what member wants.
- Brainstorm possible reasonable remedies and strategies.
- Decide on next steps.

II. Interviewing Tips

- Put member at ease; establish rapport.
- Set parameters – for example, time, topic.
- Take time to reflect and outline question areas.
- Develop a form or format for background information.
- Pay attention to body language, eye contact, tone of voice, etc.
- Take notes.
- Use open-ended questions, not “yes” or “no” questions (Who, what, when, where, how, describe, explain, tell me).
- Make questions understandable (short, not compound).
- Use clarifying questions (What do you mean?).
- Use reflective responses (I am hearing you say _____).
- Use summary statements (You mentioned at least two issues _____).
- Use silence to think and listen.
- Use the question “Is there anything else?” to complete each area before going to the next.
- Ask if there is anything else you should know to understand the situation.
(This is when you may find out about personal problems that may affect the situation.)
- Ask what member wants; brainstorm reasonable possibilities.
- Ask if the member has any questions.
- Touch base with the emotions, at least briefly (It sounds like this is a rough time for you. How are you handling it?)
- Agree on strategies and additional tasks.
- Assign additional tasks, such as checking policy or obtaining a document.
- Don’t be judgmental.
- Don’t argue.
- Don’t be a therapist – refer emotionally distraught members to the Employee Assistance Program or similar district resource.



Member’s Statement

Name: _____

Address: _____

Email Address: _____

Home Phone: _____ Work Phone: _____

Position: _____ School/Site: _____

Date of Hire: _____ Date of Membership: _____

Local Association: _____

Name of Supervisor/Administrator: _____

The following is a statement of what happened to me on _____ :
(date)

This statement is an accurate account of the incident that occurred.

Signature _____

Date _____

Original to: Association Representative

Copies to: Association Representative Member Association President Grievance/Advocacy Chair Association Grievance File





Preparing for Discussion with Supervisor

1. List major points you want to make in your presentation. Do not use full sentences, just memory joggers.

Four horizontal lines for writing notes.

2. List possible administrative comments and responses.

Four horizontal lines for writing notes.

3. List your interests and those of the supervisor.

Supervisor Interests

Grievant/Association Interests

Two columns of five horizontal lines each for listing interests.

Informal Level Grievance – Meeting with the Supervisor

Checklist

- I. Organize your initial presentation effectively.**
 - Have an outline.
 - Present positive information before dealing with weaknesses.
 - Determine what exhibits to share at this level and have copies for the Supervisor.
 - Be explicit about your proposed remedy (your “offer”).
 - Decide when it is strategic to make your offer... and make it!
 - State the offer with confidence.
- II. Determine your opening and bottom-line demands.**
 - Have the member prioritize the components of his/her initial demand.
 - Make sure you have authority to settle the grievance at or above your bottom line.
 - Deal realistically with the member’s expectations.
- III. Anticipate problems–What will you do if...**
 - The member is too emotional or fails to respond appropriately to questions?
 - New “bad” facts are identified?
- IV. Always be professional at the meeting.**
 - Be an advocate.
 - Believe in your case.
 - Be logical, but add a touch of emotion.
- V. Take breaks, if necessary.**
 - Calm down the member.
 - Review new information.
 - Revisit strategy.
- VI. Explain why it is in the Supervisor’s best interest to resolve the grievance.**
 - Avoid time, effort, and hassle of dispute.
 - Build morale.
 - Because it is fair.
 - Avoid taking up Superintendent or Board time or losing before the Superintendent or Board.
 - Other
- VII. Decide how to document any resolution.**
 - Verbal understanding, confirmed by letter or e-mail
 - Letter agreement, jointly signed
 - Other
- VIII. If no resolution, be certain of the next steps.**
 - Confirm the points of agreement and disagreement.
 - Determine whether and exactly when the Supervisor will notify the member in writing of the decision.
 - Clarify the member’s rights to proceed to the next grievance level.
 - Clarify the relevant deadlines.



Summary of Informal Grievance Meeting of school/site administrator/supervisor, association representative, and member

1. Date of Informal Meeting: _____
2. Who attended? (Indicate their names and positions.)

3. Statement of complaint: _____

4. Summary of meeting: _____

5. Resolution requested: _____

6. Was resolution obtained/satisfied? _____
7. Will a Level I Grievance be filed? _____ Due Date: _____

Original to: Association Representative

Copies to: Association Representative Member Association President Grievance/Advocacy Chair Association Grievance File



Level One Grievance

(Check District policy for prescribed format)

1. Grievant(s): _____

2. Administrator/Supervisor: _____

3. Date: _____

4. Date of Informal Meeting: _____

5. Decision of Informal Meeting: _____

6. District Policy Violated (Attach copy): _____

7. Statement of Grievance: _____

8. Remedy Requested: _____

Original to: Association Representative

Copies to: Association Representative Member Association President Grievance/Advocacy Chair Association Grievance File





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A Final Note

For more information and assistance, contact your local association, arizonaaea.org/helpdesk, or your AEA Organizational Consultant.

arizonaaea.org/helpdesk

(877) 828-1983



This brochure is a general guide for AEA members and is not intended to provide complete information or legal advice on specific problems. Changes in laws and cases may modify the information provided. To find Arizona statutes on the Internet, go to www.azleg.gov.



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