

Tips for Effective Record Keeping



Imagine that you're working on three big, complicated grievance cases. You've done your research and you're well prepared. For each case, you have 10 to 25 individual pieces of paper – documents, notes, letters, affidavits from eyewitnesses – that you keep in file folders.

Paperwork in hand, you're walking down the hallway to meet with your local union officials, your International representative, the company human resource people, and the grievants. But just as you enter the meeting room, you drop all the folders. Papers go flying to the floor, all mixed up. You'll have to read every piece to get it back in order. Everyone's looking on, and you're feeling a little foolish.

To late, it hits you: Straightening up this mess would be so much easier if each document had a number in the upper right hand corner showing which case it belongs to.

Don't Let This Happen To You!!!

Information doesn't organize itself. It is not uncommon to end up with a large amount of paperwork while handling grievances. Letters, information requests, notes from meetings, witness statements and grievance forms are just some of the many documents that find their way into the process. Stewards are responsible for keeping track of all the paperwork.

It's not an easy job. Stewards must develop a systematic approach for tracking grievance documentation. A good organizational system helps win grievances as well as provides valuable information for the negotiating committee during bargaining.

Some Basics:

- File folders work wonders. Use a separate folder for each grievance. Include the grievance form, steward fact sheets, and other supporting documents.
- Use paper clips and staples on documents that need to stay together. Also, invest in a staple remover. Ripping apart stapled documents gets messy.
- Make copies of steward notes for the file rather than ripping them out of notebooks or steno pads. Keep the original notes intact and on file.
- Use a different note page for each issue. This makes locating and copying crucial notes quick and efficient. Keeping notes this way also helps keep the issues separate in your mind.

- Put a date and time on everything. This can help jog memories regarding a particular conversation or event. In addition, if conflicting statements evolve over time, it is helpful to know which description came closest to the event in order to determine which is most accurate.
- Code everything. Each set of notes and supporting documents should have a number that corresponds to the respective grievance. Numbers help keep track of papers that might get lost or misplaced. A group of papers or a single witness statement lying loose can be identified and routed back to the file where it belongs.

No matter what type of system you adopt it is important to be consistent. Keep papers in the same order in each file. Date order works for most cases. If a file gets very large, it helps to create an index or table of contents for the front of the folder. The index is a working document that organizes information and helps make sure your file is complete. It allows you to double-check to make sure everything is in the folder. It also lets you identify any documents you haven't yet put in the file and areas you still need to investigate.

Staying organized and consistent makes the steward's tough job that much easier. It can be a pain, but in the end it saves time and stress if you can easily put your hands on paperwork surrounding a grievance. Likewise, stewards who follow in your footsteps or fill in for you when you're not available will be able to take the ball and run with it without trying to track down random pieces of documentation.