**Homework sheet for Reps Part 2** Online session 1

**Your name:**

Read session 5 in workbook pages 49 & 50, pages 56-61 (some of this was set as pre-reading).

You will have started activity E in the session with the tutor playing Alex.   
Please send your completed proforma, as below, to your tutor.

Both of the videos (as mentioned below) will be in our Prospect online collection. Your invite email will have the details and password to access these.

Watch the *How to improve your listening skills* video: <https://www.youtube.com/watch?v=D6-MIeRr1e8>

Watch the video (Activity F) on Andy’s investigation meeting, read the invitation letter on page 72 and answer the following questions:

**Did Elaine listen to Andy?**

**Looking for reps to identify that Elaine had her own agenda and was not listening to Andy and his concerns. Elaine was focusing on the issue of management and not preparing Andy adequately.**

**Did Elaine understand what the management wanted at the meeting?**

**No, I don’t think she did – she was being quite obstructive. She was fixated on what she wanted to talk about (which was not helpful to the meeting or Andy.) She hadn’t advised or prepared Andy at all.**

**Do you think she represented the member correctly?**

**No, she was very antagonistic, and she didn’t even let Andy speak or give him any support, kept talking over him. Reps can expand further – we don’t want just yes/no answers…..**

**Do you think it was appropriate for Elaine to attend?**

**According to the letter Andy received (on page 72) Elaine was able to attend as the trade union representative. Nevertheless, ideally, we’d like reps to acknowledge that they’d need to check their own policy on what they can/can’t do at investigation meetings.**

**What would you have done differently?**

**Looking for the reps to list how they would have represented/prepared Andy. (hopefully no one thought Elaine did a great job!)**

Personal case pro-forma

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| --- | --- | --- |
| **1. Basic details** | | |
| **Name:** | **Membership number:** | |
| **Does this issue pre-date membership?** (tick one) | **YES** | **NO** |
| **Employer name and work address (including postcode):**  As known | | |
| **Work telephone number:** | | |
| **Email address:**  As known – check you have another email just in case the member is off work | | |
| **Mobile:** | | |
| **Home contact details:**  As known | | |
| **Preferred contact details:** (tick one) | **HOME** | **WORK** |
| **Employer contact details:**  (ie HR Advisor or Line Manager as appropriate) | | |
| **Type of case:**  (eg grievance, disciplinary, discrimination, capability, absence-management etc) | | |
| **Has the member kept a diary of events?** (tick one) | **YES** Request a copy | **NO** Suggest they do |
| **Has anyone else been involved in advising the member?** (tick one) | **YES** | **NO** |
| **If yes, who?** | | |
| **Has member been provided with appropriate contact details for the Rep or Prospect office/Full-time officer who will deal with their enquiry?**  **YES**  Name/contact details provided | | |
| **2. Outline of case**  The following questions are examples to guide you.  Ask other questions as appropriate or relevant to the circumstances of the case. | | |
| **Have you raised the issue with your line manager/HR/anyone else and what,  if any, advice was given or action taken?**  **Looking for reps to have taken the information from the activity and give an accurate account of the information received. This can be in story form or bullet points (whichever is the preference.) In terms of content, we’re looking for enough information that if the case was escalated to the officer, they would know the details from reading the proforma** | | |
| **When did the issue arise?**  **Reps to identify the incident on the 22nd January but Alex had tried to raise with line manager over their difficulties.** | | |
| **What has happened?**  **Reps to list prior information from Alex regarding their circumstances and how they have changed. Noting the incident of Alex telling Roger to F\*\*k off on the 22nd January.**  **A complaint made and subsequently a formal meeting called** | | |
| **Who is involved?**  **Reps to list** | | |
| **Why has it happened?**  **Reps to list details around the stress and pressure the whole department is under/understaffed and comments around other staff members leaving. Roger’s lack of duty of care as a manager to take Alex’s changes in their homelife and the impact on work seriously.** | | |
| **Are there any mitigating circumstances?**  **Reps should list the content around Alex’s changed circumstances, also citing off work with stress, taking anti-depressants, main carer for two young children**  **We’re hoping reps will also acknowledge that there has been no investigation prior to Alex being invited to a disciplinary hearing. (Reps are set the workplace policy as pre reading and we as tutors should remind them to refresh their memories before finalising/sending in this form. )** | | |
| **Is it still going on?** | **YES** | **NO** |
| **Mitigation to be taken into account?** | **YES** | **NO** |
| **Timescale/key dates:**  **Reps to identify and list the timeline of events. We would like reps to highlight the length of time in between the incident and the invite to the hearing.** | | |
| **Have any meetings taken place or are any future meetings arranged?** | **YES** Give dates and details of any planned meetings | **NO** |
| Ask member for copies or any letters, emails or notes relating to the case; attach them to pro-forma. | | |
| **Are there any witnesses you  need to speak to?** | **YES** | **NO** |
| **If yes, what are the names of the key witnesses?**  **Mention possible witnesses but may be fearful to come forward.**  **REMEMBER:** It is not your role to undertake an investigation; your role is to  support the member | | |
| **What does the member expect/look for as a solution?**  **We want reps to identify that;**  **Alex doesn’t want to lose their job**  **Wishing the company to learn from how they’ve dealt with Alex and change attitude.**  **Looking to take out a grievance against Roger/Employer.**  **To put in place an agreement for Alex to pick the kids up around the child care** | | |
| **Make a note of any guidance you have given to the member.**  **We want reps to list and guidance/signposting. Further support for Alex, Prospect legal helpline, asking Alex to bring doctor notes etc to next meeting, draft grievance letter. Actions for Alex as well as them as the rep.** | | |
| **Make a note of any Prospect materials given/signposted to the member.**  E.g. applicable member guides, etc | | |
| **What are your next steps as the rep?**  **Advise Alex re the stages of grievance and start this process.**  **Speak to Ian regarding the timing/date of the meeting and ask for a delay/move to informal given grievance/cite no investigation has taken place.**  **Employer in breach of their own policy.**  **As a new rep they may wish to speak to their officer/more experienced rep re the advice.** | | |
| **3. Reassure the member…**  …that the case will be dealt with confidentially  …that the information you have gathered will not be shared with others unless agreed, and it will be kept securely.  If they wish to have a copy of this form, please let them have one. | | |