



# NOTE TAKING & DOCUMENTATION

SEIU 503 STEWARD'S CONFERENCE

# AGENDA

INTRODUCTION

WHY NOTES AND DOCUMENTATION ARE  
IMPORTANT

THE ELEMENTS OF NOTE TAKING

DOCUMENTATION

HELPFUL HINTS

ACTIVITY

KATIE STURGEON

ULPs



Rise  
unite  
fight  
Win

## INTRODUCTIONS

### MEET THE TEAM

Cristal DeJarnac

Katie Spurgeon

Hawa Abdulahi

Ezri Meier



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# WHY ARE NOTES & DOCUMENTATION IMPORTANT?

LET'S DIVE IN



# THE ELEMENTS OF NOTE TAKING

What do you need to capture?

## Who

- Names and titles of persons present

## What

- Clearly identify the issue
  - What resolution is desired
  - What is needed to resolve it

## When

- Date and Time

## Where

- Location

## Why

- Policies cited
- This may not be known



# THE ELEMENTS OF NOTE TAKING

In what spaces do you need to take notes?

- Investigatory/Weingarten meetings
- Pre/Disciplinary meetings
- Grievance Meetings
- Disciplinary
- Contract Interpretation
- Staff meetings (i.e. when a supervisor is acting inappropriately)
- In the workplace (i.e. witness an incident involving others, or experiencing inappropriate behavior)



# DOCUMENTATION

What kinds of documentation would be important to save?

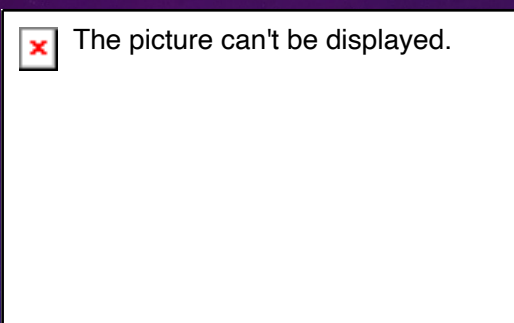
- Notes
- Emails
- Recordings of meetings
- Text Messages
- Instant Messaging
- Team Meeting notes
- Logs kept by workers
- Call logs

# HELPFUL HINTS



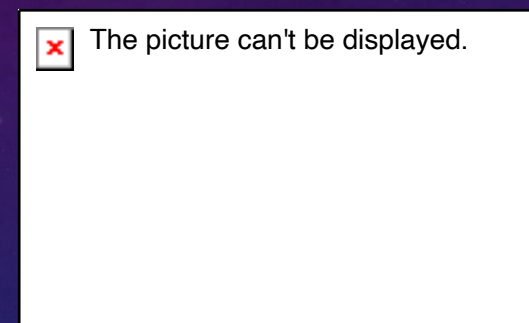
## Texts and Instant Messaging

- Get a screen shot
  - Messages can disappear over time.
- Follow-up text messages with an email as a back-up.
- Keep in a place that you can easily access.
  - Not on the employer's server



## Emails

- Follow-up verbal conversations with an email
  - I heard you say... is my understanding correct?
- A non-response is considered as the understanding is correct.
- Print emails to a PDF
- Keep in a place that you can easily access.
  - Not on the employer's server



## Recorded Meetings

- Do not rely on tape recordings.
  - Technology is great but doesn't always work.
  - Take handwritten notes.
- Always get consent, if there is not consent DO NOT record the meeting.





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# ACTIVITY



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# KATIE STURGEON

STEWARD/CHAIR  
SUBLOCAL 212