THE HFACTOR

Grievance Checklist

A structured checklist for handling employee concerns fairly, promptly and with an appropriate level of independence.

Receiving the Grievance

- [ ] Acknowledge the grievance promptly.
- [ ] Identify the issues, desired outcome and any immediate safeguarding concerns.
- [ ] Check whether informal resolution is appropriate without pressuring the employee.
- [ ] Consider conflicts of interest when appointing the decision-maker or investigator.

Investigation

- [ ] Define the scope of the investigation.
- [ ] Gather relevant documents and interview necessary witnesses.
- [ ] Keep information confidential on a need-to-know basis.
- [ ] Test competing accounts fairly rather than seeking evidence for a predetermined conclusion.

Meeting & Outcome

- [ ] Invite the employee to a grievance meeting and explain accompaniment rights.
- [ ] Allow the employee to explain the grievance fully.
- [ ] Address each material point in the written outcome.
- [ ] Set out any action to be taken and the reasons.

Appeal & Follow-up

- [ ] Provide a genuine right of appeal.
- [ ] Use an impartial appeal manager where practicable.
- [ ] Monitor agreed actions and workplace relationships afterwards.
- [ ] Keep complete records of the process and outcome.

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This checklist is a general guide and is not a substitute for advice on the facts of a particular case.