

FORMAL DISCUSSIONS: FEDERAL LABOR RELATIONS AUTHORITY CHECKLIST

(Note: The totality of the meeting circumstances and conditions must be considered when using this table; when in doubt consult with your HR Advisor).

FORMAL DISCUSSION ELEMENT	FACTORS INDICATING A FORMAL DISCUSSION	FACTORS NOT INDICATING A FORMAL DISCUSSION
FORMALITY	Do you intend to require employees to attend?	Do you intend to make attendance voluntary?
FORMALITY	Do you intend to take notes or minutes or record the results of the meeting, use an agenda or a plan for conducting the meeting?	Do you intend to have a casual conversation?
FORMALITY	Do you intend to hold the meeting in a conference room or other non-workplace area?	Do you intend to hold the meeting on the shop floor?
FORMALITY	Do you intend to invite higher level management officials or other agency employees not involved in the day-to-day work with the employees?	Do you intend to only have a first line supervisor present?
FORMALITY	Do you intend to schedule the meeting in advance?	Do you intend to inform employees just before the meeting is to take place to gather together?
FORMALITY	Do you intend to conduct the meeting for a scheduled amount of time?	Do you intend to plan to only talk for a few minutes?
FORMALITY	Do you intend to discuss a significant topic of concern to the employees and the union?	Do you intend to discuss a routine topic?
SUBJECT MATTER	Do you intend to discuss any pending grievance, whether at the informal or formal stages of the negotiated grievance procedure?	Do you intend to discuss a matter of concern raised by a particular employee?
SUBJECT MATTER	Do you intend to discuss a workplace matter of concern to employees generally?	Do you intend to meet only with one employee to discuss a performance matter that concerns only the employee?
SUBJECT MATTER	Do you intend to discuss a personnel policy that pertains generally to all employees?	Do you intend to meet with one or a few employees to discuss the routine monitoring of job functions?
SUBJECT MATTER	Do you intend to discuss with one employee a formally proposed or final decision on a performance or disciplinary matter?	Do you intend to discuss an employee's job performance or conduct?
SUBJECT MATTER	Do you intend to discuss a formal EEO complaint?	Do you intend to discuss an informal EEO complaint?