

This checklist is designed for OPEIU Local 109 Stewards representing AMC pilots in investigatory meetings. It integrates Article 9 and 10 of the Collective Bargaining Agreement (CBA) with the Equality Rule and the Railway Labor Act (RLA) framework.

Phase 1: Pre-Meeting Preparation

- **Confirm the pilot made a request:** Under the RLA and Article 9.2, representation is a contractual right that the pilot must explicitly request representation.
- **Establish the reason for the meeting:** Management is contractually required to inform the pilot of the reason(s) for the investigatory request.
- **Assert the right to prep time:** You have the right to meet privately with the pilot to consult **prior to the pilot responding** to management's questions.
- **Verify the 48-hour rule:** Ensure the meeting is scheduled within a reasonable time, not to exceed **48 hours**, to allow for representative availability.
- **Conduct a preliminary "Six Ws" investigation:** Use the private prep time to document **Who, What, When, Where, Why, and Witnesses** from the pilot's perspective.
- **Remind the pilot of the "Gold Rule":** Advise them to listen carefully, keep answers short and factual, and never volunteer extra information.

Phase 2: Inside the Meeting (The Equality Rule)

- **Assert your equal status:** When functioning in a representational capacity, you are the **legal equal of management** and not a subordinate.
- **Monitor the questioning:** You are not a "potted plant"; you have the right to stop the supervisor from harassing the worker or to ask for clarification on compound or misleading questions.
- **Apply the 80/20 Rule:** Spend **80% of your time listening** and **20% talking** to ensure you fully understand management's evidence and position.
- **Take meticulous notes:** Use a **Grievance Fact Sheet** to record the specific questions asked and the pilot's responses for the official record.
- **Use the Private Caucus:** You have a contractual and legal right to pause the meeting at any time to speak privately with the member if the meeting takes an unexpected turn.
- **Challenge the "Right-to-Work" Myth:** If management suggests they can fire at-will due to state law, state clearly that the **CBA's Just Cause protections** apply in all 50 states regardless of local law.

Phase 3: Escalation Triggers (Call the Executive Representative)

STOP and contact your Executive Representative immediately if any of the following occur:

- Management indicates the pilot may be **removed from the payroll** or suspended without pay.
- The allegation involves **FAA violations**, safety deviations, or FAR non-compliance.
- The incident involves alleged **Drug or Alcohol policy** violations.
- A **customer (hospital program)** requests **removal** of the pilot from their base.
- The pilot is placed on **paid administrative leave** that is likely to exceed **7 days**.

Phase 4: Closing the Meeting

- **Confirm the allegation:** Before leaving, state: *"Just to confirm for the record, the pilot is being investigated for Specific Allegation, is that correct?"*
- **Request the timeline:** Ask for the expected next steps and a written timeline for the investigation's resolution.
- **Final Pilot Briefing:** Instruct the pilot **not to discuss the case** with anyone, including coworkers or on social media, until the union advises otherwise.
- **Finalize the record:** Complete your notes immediately while the details are fresh to ensure accuracy for a potential grievance.

Disclaimer: *The Collective Bargaining Agreement (CBA) always controls. If a conflict arises between this checklist and the contract, follow the Agreement.*