

Aisha Patel
HR Advisor
Employer HR file

Date: 14 July 2026
Our Reference: GC/135294C4
Document Type: Checklist

Grievance Checklist

1. OVERVIEW

This document provides a detailed operational checklist to guide the handling of the formal grievance raised by Aisha Patel, HR Advisor, concerning alleged repeated curt treatment and perceived unfair overtime allocation within the Leeds site project team, including foreman and apprentices.

The grievance was received by email on 4 March 2026 and relates primarily to events during February to March 2026.

The procedure is conducted under the GraniteWay Grievance Procedure (draft v2, Jan 2026).

The formal grievance meeting is scheduled for 25 March 2026 with the employee, foreman, Operations Manager Harriet Lowe, HR Advisor Aisha Patel and an apprentice witness in attendance.

The grievance investigation is in progress, led initially by Aisha Patel with scope to escalate to an external investigator if unresolved.

This checklist supports fair, consistent and transparent grievance process management, capturing actions, responsibilities, timelines, evidence and completion notes.

CHECKLIST DETAILS

Employee
Aisha Patel

Role
HR Advisor

Case type
Grievance Procedure

Reference
HRA-135294C4

KEY DATES

Completed
14 July 2026

First review
25 March 2026

Owner
Harriet Lowe

Attachments: Evidence log | Investigation action plan

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Grievance Checklist

2. CHECKLIST OF GRIEVANCE PROCESS TASKS

TASK | OWNER | PRIORITY | DUE DATE | EVIDENCE REQUIRED | STATUS | COMPLETION NOTES

Evidence Log

Evidence Item	Source	Date	Relevance	Reviewed By
grievance-evidence-synt	Synthetic Sample Reviewer	14 July 2026	Synthetic fixture evidence for sample generation.	Synthetic Sample Reviewer

Follow-up Action Plan

Action	Owner	Due Date	Evidence Required	Status
Review the grievance outcome record and confirm it reflects the agreed facts.	Harriet Lowe	25 March 2026	Completion note or supporting evidence	Open
Review the grievance outcome letter and confirm it reflects the agreed facts.	Harriet Lowe	25 March 2026	Completion note or supporting evidence	Open
Grievance Follow-up is due on 01 April 2026.	Harriet Lowe	25 March 2026	Completion note or supporting evidence	Open
Arrange a grievance meeting where appropriate.	Harriet Lowe	25 March 2026	Completion note or supporting evidence	Open
Record the grievance outcome and appeal route.	Harriet Lowe	25 March 2026	Completion note or supporting evidence	Open
Review the completed documents for factual accuracy before issue or filing.	Harriet Lowe	25 March 2026	Completion note or supporting evidence	Open

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Continued**Grievance Checklist****3. CHECKLIST DETAIL**

1. Grievance Receipt and Acknowledgement | Harriet Lowe | High | 04 March 2026 | Grievance email from Aisha Patel | Completed | Grievance formally acknowledged and logged (Ref: HRA-135294C4).
2. Initial Review of Grievance | Aisha Patel | High | 10 March 2026 | Employee's statement, rota, timesheets, toolbox talk minutes | Completed | Preliminary assessment conducted; noted employee's reports of curt language, exclusion from overtime.
3. Investigation Planning | Aisha Patel | High | 12 March 2026 | Investigation plan documenting interview schedules and evidence list | Completed | Investigation plan approved; includes review of witness statements and rota records.
4. Informal Support Offered | Project Manager | Medium | 12 February 2026 | Records of informal discussion | Completed | Informal discussion held with project manager; no formal adjustments applied.
5. Conduct Grievance Meeting | Harriet Lowe | High | 25 March 2026 | Meeting minutes, attendance records, companion details | Scheduled | Meeting arranged with all parties including companion rights confirmed.
6. Witness Interviews and Additional Evidence Gathering | Aisha Patel | High | 10 April 2026 | Interview notes, witness statements (including apprentice Jamie Clarke), rota audits | In Progress | Additional witness accounts requested and statements being reconciled for consistency.

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Continued**Grievance Checklist****4. CHECKLIST DETAIL CONTINUED**

7. Review and Reconcile Evidence | Aisha Patel | High | 10 April 2026 | Reviewed rotas, timesheets, witness testimony, toolbox talk minutes | In Progress | Preliminary findings indicate inconsistent overtime allocation; no conclusive bullying evidence yet.

8. Draft Grievance Outcome Record | Aisha Patel | High | 12 April 2026 | Outcome draft balancing operational needs and interpersonal conduct, referencing policy | Pending | Draft to reflect formal acknowledgement, review of overtime allocation, manager coaching recommendations.

9. Manager Coaching Arrangements | Harriet Lowe | Medium | 20 April 2026 | Coaching session records | Pending | Plan in place to provide coaching for foreman to improve communication and fairness.

10. Outcome Communication to Employee | Harriet Lowe | High | 15 April 2026 | Outcome letter, appeal route information | Pending | Formal written outcome and appeal instructions to be issued by email as PDF.

11. Follow-up Review and Monitoring | Aisha Patel | Medium | 15 April 2026 | Follow-up meeting notes, progress reports on rota fair allocation | Pending | Follow-up scheduled to ensure implementation and monitor workplace climate.

12. Appeal Handling (if submitted) | HR Advisor | Medium | Within 10 working days of outcome | Appeal submission, independent review notes | Not Applicable | Appeal route specified in outcome letter; process outlined for impartial review.

Attachments: Evidence log | Investigation action plan

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Grievance Checklist

5. IMPORTANT CONSIDERATIONS AND SAFEGUARDS

- Verify consistency and reliability in witness statements before finalising outcome.
- Confirm accuracy of rota calculations and overtime allocation records.
- Ensure compliance with GraniteWay Grievance Procedure and statutory employment law obligations.
- Maintain strict confidentiality of all grievance-related information.
- Remind all parties of available wellbeing support including Employee Assistance Programme and referral to occupational health if required.
- Preserve neutrality and avoid predetermination of outcome prior to full evidence and hearing.
- Include companion rights advice in grievance meeting communication to employee.
- Record any deviations from process and rationale transparently in file.

6. CONFIDENTIALITY STATEMENT

All information gathered during the grievance process is confidential and will be handled in accordance with data protection principles and company policies to protect the privacy of all individuals involved.

Attachments: Evidence log | Investigation action plan

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7. **APPEAL RIGHTS**

Should Aisha Patel wish to appeal the outcome, she may submit a written appeal to the Director within 10 working days of receipt of the outcome letter.

The HR function will log any appeal and appoint an independent reviewer to ensure impartiality.

Appeal procedures will follow the guidelines set out in the GraniteWay Grievance Procedure (draft v2, Jan 2026).

8. **WELLBEING AND SUPPORT**

The employee has been offered access to the Employee Assistance Programme (EAP).

If preferred, reduction in immediate shift allocation may be arranged to support wellbeing during the grievance process.

Signposting to occupational health services is available should any health-related concerns arise or require assessment.

9. **AMENDMENT CONTROL**

Any changes to the facts, decisions, actions, evidence, responsibilities or review dates should be agreed in writing and recorded as an amendment to this document.

Appendix A - Amendment Log

Amendment Date	Section Updated	Previous Position	Updated Position	Approved By

Attachments: Evidence log | Investigation action plan