Best Practices for Meetings

This fact sheet answers:

• Why Do I Need to Meet With My Employer?
• What Should I Do Before the Meeting?
• What Should I Do After Important Meetings?
• And More
Why Do I Need to Meet With My Employer?
There are many reasons you may need to meet with your employer. For example, your employer may ask to meet to talk about your performance or discipline.

There are also reasons you might ask for a meeting, such as to talk about a discrimination complaint or ask for a reasonable accommodation.

Whatever the reason, these best practices can help make sure your meeting is effective and productive.

What Should I Do Before the Meeting?
Prepare for the meeting. Tips:
• Think carefully about what you hope to accomplish in the meeting. Use the Employee Worksheet at the end of this fact sheet to organize your thoughts.
• Make an outline to use during the meeting. An outline will help you remember what you want to say, even if the meeting becomes hectic.
• If your meeting is about a reasonable accommodation or an employment complaint, consider sending the request or complaint in writing in advance.
• Collect any relevant documents and bring at least two copies with you.
• If you are a member of a union, tell your union representative.
• Practice what you are going to say.

What Should I Do During the Meeting?
• Arrive on time.
• Be polite and calm.
• Stick to the points you prepared before the meeting. Don’t try to bring up other issues.
• Take notes of everything that you and your employer said. If you do not want to take notes during the meeting, write down everything you remember right after the meeting.
• Ask your employer to follow up with you in writing about everything that was agreed upon during the meeting.
• Do not record the conversation without asking if it is okay with your employer (this is against the law in Illinois).
• Remember: You don’t have to agree to anything on the spot. You can say you need time to think over your employer’s response or comments.
What Should I Do After the Meeting?
Follow up in writing, recapping everything that was discussed and agreed upon. One way to do this is to send a thank you note.
- Thank you for meeting with me to discuss my request for an accommodation...
- Thank you for your time today to discuss my concerns about... During this conservation, you said that...

Should I Know Anything Else if My Meeting Is About My Request for Reasonable Accommodations?

Before the meeting
- Ask for the meeting in writing or email. See the CAP’s “Asking For a Reasonable Accommodation” fact sheet for a sample letter and more information.
- Think about what accommodations will allow you to do your job. Try to come up with as many alternative accommodations as possible. Make a list of possible accommodations that would help.
- Gather any necessary medical documentation.

During the meeting
- Go in with an open mind.
- Be prepared to negotiate and talk about alternative accommodations.
GETTING READY FOR A MEETING
Use this worksheet to organize your thoughts to prepare for your meeting. You can use this worksheet as an outline for your meeting as well.

List All Issues That You Want to Address
1. 
2. 
3. 

What do you need to share with your employer about this issue? Do your best to share critical information, but not unnecessary information.

What is your idea for a solution? Why is this solution best for you? Why would it work for your employer? Do your best to focus on how to resolve the issue.

What are alternative solutions? Do your best to be open-minded.

Gather but not always needed to share. What support do you have for your position? Possible support can include relevant documents, notes, emails, etc.

What else do you need to share about this issue?