



Reference Guide

How to Use This Packet

<p>1 Complete the Cover Page Fill out the Facility Name, Date, Purpose of the walkthrough, and any Preliminary Notes before the visit begins.</p>	<p>2 Pre-Meeting with Union Leadership Convene with local union leadership prior to the walkthrough. Log member concerns, identify priority areas, and establish the scope and ground rules for today's visit.</p>
<p>3 Meet with Administration Meet with facility administration to introduce the team and state the purpose of the visit. Identify any areas requiring escort or restricted access.</p>	<p>4 Rip Out & Pass Around Sign-In Sheet Tear out the Sign-In Sheet (last 2 pages) during the meeting with administration and pass around for signatures from all parties present.</p>
<p>5 Walkthrough — Observation Notes Complete one Observation page per area visited. Check the applicable concern categories and document all findings, conditions, and observations in detail.</p>	<p>6 Post-Walkthrough Meeting with Administration Meet with administration to present and discuss all observations, findings, and recommendations. Record all responses, agreements, commitments, and any refusals by name and title.</p>
<p>7 Complete Action Items & Share with Administration Transfer every unresolved issue into the Action Items Tracker with a responsible party and target date. Provide a copy to administration before leaving. Retain the original in PEF unit records.</p>	<p>8 Share Findings with Members & Follow Up Report all findings, agreements, and action items back to the membership. Monitor outstanding issues, track commitments made by administration, and follow up to ensure corrective actions are completed in a timely manner.</p>

Degree of Risk Matrix

Combine Likelihood and Severity to assign a risk level to each observation.

Likelihood	Minor	Moderate	Serious	Critical
Almost Certain	Moderate	High	Imminent	Imminent
Likely	Low	Moderate	High	Imminent
Possible	Low	Low	Moderate	High
Unlikely	Low	Low	Low	Moderate

LOW	MODERATE	HIGH	IMMINENT
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No immediate danger — schedule for correction.

Potential for harm — address in reasonable timeframe.

Likely harm if unaddressed — prompt corrective action.

Immediate danger — notify administration immediately.



Action Items Tracker

#	Action Item / Description	Responsible Party	Priority	Target Date	Status
1					
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Facility: _____

Date: _____

#	Printed Name	Title / Position	Email Address
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Facility: _____

Date: _____

#	Printed Name	Title / Position	Email Address
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