

How to Participate in a Third Party Complaint Meeting

BEFORE MEETING

- When possible, meet with member.
- If member has prior knowledge of why they are being called into a meeting, try to get all the information about the incident from the member.
- Say, “If I hear anything for the first time during the meeting, it will make it harder for me to help you.”
- Get the story - the Who, What, Where and Why are important but the **WHEN** may be the most important. Get a comprehensive timeline of events.
- Have them practice the timeline to you out loud. Remind them to keep a level head, not to volunteer unnecessary information, joke, or trail off onto asides.

What if they don't know why they're called in for a meeting?

- They should be **honest** but not pontificate. Lying will only come back to bite them.
- If the member is floundering or a bomb of an accusation is dropped, ask to take a moment talk to them member privately (caucus, see below). This will help them collect themselves.

DURING MEETING

Roles in meeting:

- Member – answers questions as succinctly as they can.
- Human Resources and/or Principal – asks questions.
- Union Rep – makes sure:
 - Questions asked are fair and relevant.
 - Asks member clarifying questions that you already know the answers to provide relevant context for shared information.
 - Request caucuses (sidebars with the member) if necessary
 - Make sure HR/Principals focus on specific issue (*do not allow background/personal information*)—Articles 8.2 and 8.3

Red Flags – questions or issues that are off limits for HR/Principals to ask member.

- Health issues - either mental or physical
- Personal life – anything outside of school

When to caucus:

- Common practice is for HR/Principal to leave room so you can talk privately.

- A caucus can be called as often as needed. Do not feel like you are wasting time.
 1. If you did not get to meet with member prior to meeting; as soon as issue is revealed it may be best to ask to confer privately.
 2. Member is getting flustered. Call a caucus to allow the member to calm down and review facts.
 3. New evidence is presented that you and/or member have not heard before.

ENDING A MEETING

- Have a clear plan on the next steps.
- Questions to ask HR/Principal:
 - Will there be a next meeting? If so, when?
 - What is the next step?
 - When will the member hear back from you?
 - Will this go into personnel file?
 - Which way are you leaning? (they do not have to answer this)

AFTER THE MEETING

Immediately find a spot to conference with member.

1. Have member take a deep breath.
2. Ask the member questions:
 - How do you think it went?
 - Why do you think that?"
 - How do you feel?
3. Give your honest opinion of how it went, even if it is different than the member's opinion.
4. Set clear expectations of next steps.
5. Call UniServ Director to debrief situation: (410) 535-2518 or (443) 454-1169.

Written Statements

These can be helpful to recollect the situation in the member's own words. It should not be written during the meeting, and it can be reviewed by the UniServ Director prior to submission to the principal or the Department of Human Resources. If the member does not want to submit a statement, they should request to review what will be submitted in lieu of their statement as part of the investigation to ensure it accurately accounts for the events as they have discussed them.