

## **ADVICE SHEET 6 SORTING OUT PROBLEMS/GRIEVANCES updated 25<sup>th</sup> January 2022**

In any organisation, problems and grievances will occur from time to time and it is important that all members know where to turn for help, advice and support, so that whatever the issue, it can be dealt with quickly and objectively and appropriately.

**PROBLEMS FOR A GROUP LEADER WITHIN AN INTEREST GROUP** Problems will arise within a group and most of these will be resolved within the group and without recourse to this document. Examples of these could be -

- Poor attendance or timekeeping
- Failure to pay fees

In most cases the Group Leader will be able to sort it out by talking to the member/members in question and resolving the problem informally and amicably.

However sometimes problems may appear simple at the outset but can mask other possibly more serious issues. Group leaders need to be aware of this to ensure that the correct action is taken.

Examples could be –

- Disruptive or unsocial behaviour
- Disagreements between members

A group leader should not allow a situation to continue which impacts on other members of the group. Any issue which cannot be resolved amicably within the group in a timely fashion should be referred to the General Coordinator. Both Group Leader and General Coordinator should consider the following –

- Could this be a bullying or harassment issue? (see appropriate policy)
- Is there any element which could be discriminatory? (see Equality, Diversity and Inclusion Policy)
- Could anyone concerned be classed as vulnerable? (see Safeguarding Policy)

If there is even the slightest concern that any of the above could be part of the problem then the General Coordinator should seek the advice and guidance of the Executive Committee.

**PROBLEMS WITH THE GROUP LEADER** Initially the member/members should try to resolve the problem by discussing it with the group leader. However, if this is unsuccessful or if the member/members involved feel unable to do so, the matter should be referred to the General Co-ordinator or the designated trustee.

### **GROUP LEADERS SHOULD NOT HAVE THE AUTHORITY TO EXCLUDE A MEMBER FROM THE GROUP**

#### **PROBLEMS WITHIN THE U3A AS A WHOLE**

- Member to member
- Member and the committee
- Member and an individual trustee
- A member who brings the U3A into disrepute or acts in a way which is prejudicial to the U3A
- A member who causes damage to property and/or equipment through misuse/negligence etc. The above should all be referred to the designated trustee in the first instance unless that person is personally involved, in which case, the Hon Secretary or Vice Chairman should take over.

## **INITIAL PROCEDURE WHEN A PROBLEM/GRIEVANCE IS REFERRED**

- Establish the facts quickly, consulting as many people as possible but observing confidentiality.
- Have an informal discussion with all concerned to summarise the problem, hear everybody's views and clear the air
- If you feel there is a case to answer but that nevertheless it is a relatively minor issue, make it clear to all present that there must be no repeat of the sort of actions/behaviour which led to this problem
- If you feel that the situation warrants a more formal approach eg where harassment, discrimination, vulnerability could be an issue, or a particular course of action e.g. exclusion from an interest group, you should refer the matter to the committee which will agree a course of action.

## **COMMITTEE PROCEDURE**

- The relevant people should be invited to a committee meeting, accompanied by a friend if required.
- The matter should be fully discussed with the individual/individuals concerned who shall be given the opportunity to state their case
- Written records must be kept
- The committee will then take into account any mitigating circumstances and make its decision which should be communicated in writing.

## **POSSIBLE FORMS OF DISCIPLINARY ACTION**

Level 1 - a verbal warning about future conduct by an elected officer with another officer present, which should be confirmed in writing

Level 2 - a written warning which clearly states what will happen if the situation is repeated

Level 3 - a final written warning Level 4 - exclusion from an interest group

Level 5 - termination of U3A membership

Ideally you will be able to sort out most problems either through an informal chat or through Levels 1 or 2. However, in the case of an extremely serious proven misdemeanour, for example,

- Sexual/racial abuse, discrimination, harassment, bullying
- Dangerous or violent behaviour
- Falsification of expense claims
- Theft
- Malicious damage
- Conduct which brings the U3A into disrepute or is prejudicial to the U3A or the running of the U3A the committee has the right to move immediately to Level 3-5.

**RIGHT OF APPEAL** Before a member is excluded from an interest group or has his/her membership terminated, a right of appeal should be offered. An appeal, providing it is lodged within a 7 day period, can take the form of written representation for the committee to consider or a request for a right of reply. If it is the latter, a meeting of the whole committee should be called and the member(s) in question should be asked to attend accompanied by a friend/friends who may also speak. The whole issue should be summarised and then the member(s) given the opportunity to speak, along with the supporter(s) if so desired. In both cases, the committee will review its decision, taking into account any mitigating circumstances, and then make a final decision, which must be communicated in writing.

## **PLEASE REMEMBER THE FOLLOWING**

- You must ensure every action you take is documented
- You must deal with problems and grievances quickly and fairly
- You should do all you can to settle the issue without having to resort to formal disciplinary action
- You should maintain confidentiality