



## Bridlington U3A Policy – Problems - Grievances

Problems and grievances will occur from time to time and it is important that 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.

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

**If you are contacted about a problem, you must ask the person/persons involved to contact either the Group Co-ordinator or the Chair in writing. You also must maintain confidentiality.**

**When an incident is reported it should be referred immediately to the Group Co-ordinator if it concerns a group or the Chair for any other incident.**

**The Group Co-ordinator or Chair must**

- Ask for the problem/grievance to be written down by both sides
- Establish the facts quickly by consulting as many people as possible.
- Ensure every is documented.
- Deal with problem/grievance quickly and fairly.
- Do all they can to settle the issue without having to resort to formal disciplinary action.
- Maintain confidentiality.

**All the procedure must be documented and kept on file for 12 months.**

### **2. PROBLEMS WITHIN AN INTEREST GROUP**

Problems can arise within a group e.g.

- Disruptive and/or unsocial behaviour.
- Poor attendance/timekeeping.
- Unsuitability.
- Failure to pay fees.
- Disagreement between members.

If a problem arises the Group Leader must inform the Group Co-ordinator or Chair as soon after the problem occurred as possible. The Group Leader should not allow a situation to continue which impacts on the enjoyment of other members of the group. The Group Co-ordinator or Chair can initially be contacted by phone but the problem **must** be written down and sent to them as soon as possible after the incident. The written account **must** state what the problem is in as much detail as possible, include; names of person/persons involved and anyone who may have witnessed it; the day, time and place it occurred; the day and time it is reported.

The Group Co-ordinator or Chair will then decide on the next steps as below:

- Ask the Group Leader to try to resolve the situation informally and amicably by having a **quiet** word with the member/members in question. Maintain confidentiality – do **not discuss it with the group or anyone other than the Group Co-ordinator or Chair unless told to by them.**
- If it requires more or this fails, then the problem will be dealt with as in Section 4.

Group Leaders **cannot** exclude a member from the group permanently. That decision must be made by the committee. A Group Leader **cannot** refuse to have a member in the group without good reason approved by the committee. If a Group Leader refuses to have a particular member in his/her house, then it will not be possible for the group to continue to be hosted there. If the Group leader does not abide by this then an alternative Group Leader must be sort.

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## **2. PROBLEMS WITH THE GROUP LEADER**

If a member has a problem with a Group Leader they must try to resolve the problem by discussing it with the Group Leader. If this is unsuccessful or if the member involved feels unable to do so, the matter should be referred to the Group Co-ordinator. The Group Co-ordinator will decide the next course of action

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## **3. 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 **must** be referred to the Chair in the first instance unless that person is personally involved, in which case, the committee will decide who should take over.

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## **4. PROCEDURE WHEN A PROBLEM/GRIEVANCE IS REFERRED**

**Possible next steps (whichever is most appropriate):**

- Discuss the problem with the Group Leader/member to try to resolve it.
- 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 it is a minor issue, it must be made clear to all parties that there must be no repeat of the sort of actions/behaviour which led to this problem.

- If the situation warrants a more formal approach or a particular course of action e.g. exclusion from an interest group, you should refer the matter to the committee to agree a course of action.

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## **5. COMMITTEE PROCEDURE**

All the people involved must attend a minuted meeting with either some or all members of the committee so that the matter can be fully discussed and an opportunity provided for everybody to state their case. The committee will then consider the matter, taking into account any mitigating circumstances and agree what action to take.

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## **6. COURSE OF ACTION**

- Level 0 – no formal action (action taken but not given official warning)
- 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.

Formal disciplinary action will start at level 1. 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 Levels 3, 4 or 5.

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## **7. 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 and in the case of expulsion from the U3A, must 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 in question should be asked to attend and can be accompanied by a friend who may also speak in a personal capacity. The whole issue should be summarised and then the member given the opportunity to speak, along with the supporter 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.