

INVESTIGATION MEETINGS GUIDE

WEAC strongly recommends that a member bring an Association Representative (AR) with them into any investigatory meeting. That can be a Building Representative (BR), a local union officer, or even just a trusted colleague if there is not a BR or officer in the local.

BEFORE

Before the Meeting

1. Identify an AR. The member who is being investigated should ask a BR to come to the meeting with them. If there isn't a BR, then a local union officer or even a trusted colleague who is a union member can serve as your association representative.
2. You and your AR should review the FAQ together.
3. Write down a detailed account of what happened if you know what the subject of the investigation meeting is or is likely to be about so the details are clear in your mind (who was there, what was said, who witnessed it, when and where it happened). Do this as soon as possible while the details are still fresh in your mind.
4. You or your AR should ask (via email is fine) why they have decided to investigate you (dates, times, locations, and alleged misconduct), what rules they believe that you may have violated, and for copies of any information (witness statements, payroll records, video recordings, etc.) that they have already collected that led to their decision to investigate.
5. Once you have the information, either beforehand or at the beginning of the meeting (take a caucus if needed in order to do this), prepare how to respond.
6. If there is an allegation against you and it might be criminal, have your AR contact the UniServ Director assigned to the local. You will likely want to consult a criminal defense attorney (see the FAQ for additional information)

7. Review the basic protocol for the meeting:

- Answer honestly (and be aware that school premises are often recorded and the District may have video of the incident that resulted in the allegation that they can compare your response to)
- Don't volunteer information that hasn't been asked for, and answer yes/no questions with yes or no. The exception would be if you have a specific piece of exonerating information to share.
- You or your AR can call a brief caucus to get the meeting back on track if needed.

DURING

During the Meeting

1. Find out what the investigation is regarding, even if you already have some idea or administration previously indicated what it might be.
2. If you are only hearing for the first time what the investigation is about, which is not uncommon, or it is different than what was initially stated, take a caucus in order to prepare to respond.
3. The AR should take good notes during the meeting, using initials to indicate who said what. It is especially important to capture a timeline of events, details of what is alleged, the information provided by our member, and the names of any witnesses that administration or our member references.
4. The AR or member should ask clarifying questions if things are unclear.
5. The AR may wish to ask the member to share additional information that might be helpful to the member or provide useful context that the member may not recall in the moment.
6. The AR or member should ask administration to be more specific if they ask very broad or open-ended questions such as "tell us what happened yesterday afternoon?" You do not want to provide them with details that they weren't aware of that might put you in further jeopardy.
7. The AR should conclude the meeting by summarizing what has been shared and explain why the member should not be disciplined.

AFTER

After the Meeting

1. The AR should share a brief email summary and their notes with your local president or grievance chair and the UniServ Director assigned to your local.
2. Save any documents related to the investigation, including your notes, in a non-public place.
3. Be patient. Sometimes investigations can take a long time. Your AR can check in with administration from time to time for an update.