

# Ledbury & District u3a

## Grievance Procedure

### 1) Definitions

**Complaints procedure:** this may include complaints from members about an issue that has arisen or complaints from an external organisation or individual. Depending on the nature and source of the complaint, the committee will make a decision as to how best to approach reaching a resolution.

**Disciplinary procedure:** is a procedure to deal with infringements of the rules and standards of u3a by a member or trustee.

**Grievance procedure:** is a procedure to deal with a problem or concern a member or trustee has with the organisation or their relationship with a person/persons in it.

### 2) Responsibilities of the committee

This procedure sets out how Ledbury & District u3a will approach a grievance of a member or Trustee. This procedure is intended to ensure any issues are dealt with promptly, fairly and consistently. All parties are encouraged to take a problem-solving approach to achieve resolution.

In the event of a report of a grievance, any member or Trustee allegedly breaching the Code of Conduct or if a breach becomes apparent, the Chair will be notified immediately.

In carrying out this procedure, Ledbury & District u3a will ensure the following:

- Every action will be documented.
- Grievance matters (including the appeals procedure) will be dealt with quickly and fairly.
- Ledbury & District u3a will strive to de-escalate any situation and to settle the issue without having to resort to more formal procedure.
- Ledbury & District u3a will seek additional support from Trust staff, the Regional Trustee and Trust Volunteers, as required. All requests for support will go via the National Office.
- Confidentiality will be maintained at all times. For more serious issues Ledbury & District u3a will liaise with the Third Age Trust to seek advice and guidance about procedural issues. Sharing of information with the Trust will not constitute a breach of confidentiality due to the affiliation with the Trust. Members involved in the grievance procedure will be informed of the Trust's involvement.
- Decisions will be based on facts and evidence.
- A grievance may arise as a result of disciplinary action or it may require the use of the disciplinary procedure. Care should be taken to distinguish between the two procedures.

### 3) Confidentiality

All discussions and documents relating to a grievance must be kept confidential at all times. Information will only be shared with those who have a genuine need to receive it and this will include Trust staff and volunteers, as required. All situations should be dealt with discreetly and by showing respect for the parties and views involved.

### 4) Grievance Procedure

#### **a) Informal Stage**

It is very important to try and resolve grievances and disagreements amicably and informally in discussion with the group leader/committee member in charge. This is more likely to lead to a better relationship between the parties in the longer term.

A confidential written record of the outcome of the informal discussion may be kept.

Where the grievance cannot be resolved informally, it should be raised under the next stage of the procedure.

### **b) First Stage**

Members or trustees should put their grievance in writing to the appropriate person in charge of the group/committee. If the grievance is against this person, it should be raised with someone with more authority.

The grievance should be dealt with confidentially, promptly and within 14 days. Explanation should be given if there is delay and a time given for when a response can be expected, which should be in writing.

A meeting may be called to discuss the grievance at which the individual has a right to be accompanied.

### **c) Second Stage**

If the grievance is not resolved at Stage 1, it can be raised at a higher level, at regional level and with the Third Age Trust as appropriate. The same principles apply regarding time, confidentiality, documentation and the right to be accompanied at any meeting or appeal hearing.

At Stage 2 or in the event of an appeal, the Chair or Vice Chair may choose to ask committee members from a neighbouring U3A to participate or seek advice or request attendance from Third Age Trust staff or Trustees to resolve the grievance.

### **Decision**

The decision should be communicated in writing to the member or Trustee advising him/her of the outcome.

If applicable, they will be informed:

- Of the action that will be taken as a result;
- That they have the right of appeal;
- That the appeal request must be lodged with the Chair within 14 days from the date the decision is communicated.

### **Related documentation:**

Complaints Procedure U3A-KMS-DOC-037;

Disciplinary Procedure U3A-KMS-DOC-038

This policy was drafted April 2021

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