

**Society of Ortho-Bionomy International  
Conflict Resolution, Complaint & Filing a Grievance**

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**Introduction**

The purpose of the Society of Ortho-Bionomy International® (“Society”) is to promote the practice, advancement and evolvement of Ortho-Bionomy® education/practice. The Society has the responsibility of establishing professional standards and ensuring compliance with our Code of Ethics.

As Ortho-Bionomy Practitioners, we share a mutual interest in the practice and teaching of Ortho-Bionomy. We apply these universal principles of:

- gentleness
- movement away from pain and tension
- movement towards ease
- non-judgmental healing interaction in all relationships
- recognition of on-going pattern and when to interrupt it

These principles apply in their fullest measure whenever one of our trainees or members makes a complaint about another trainee, a teacher, a Society officer or anyone else associated with the Society.

While the complaint & grievance procedures are, of necessity, somewhat impersonal in their logic, the actual process is served best by the model of healing rather than that of legal retribution. It is of creating a sense of safety for all involved in the process. **This is a process of good faith.** Our hope is that, by  
Revised January 2018

following the procedures *with a caring and supportive attitude*, activities that have led to complaints can be corrected in such a way as to improve the overall functioning of our Society. It should be handled with integrity, fairness and active observation, including good listening skills.

If a grievance or complaint does not reach the level of a breach of the Code of Ethics or professional standards, then the Grievance Committee may recommend or assist in informal conflict resolution. The Board of Directors has created “Conflict Resolution Guidelines” which contain steps and recommendations to resolve conflicts between Society members. When possible, the Grievance Committee may assist in negotiation, mediation or arbitration between members.

Unfortunately, in some circumstances it will be necessary for the Board to take disciplinary action. We also recognize there may be actions, activities or behaviors that require the termination of a membership in the Society.

### **Glossary of Terms:**

- **Complaint & Grievance Handbook** - Full document of forms and the process for a person (who may become the Complainant) to have support in an complaint or formal grievance
- **Complaint/Request for Conflict Resolution** – Person – member or nonmember – completes form requesting conflict resolution support regarding a claim against a member. The complainant does not want to file a formal grievance to go to committee. This may be a request for conflict resolution third party support or mediation.
- **Grievance** – Person – member or nonmember-completes form requesting a formal committee investigation on a complaint against a member.
- **Grievance Committee Handbook** - Full document of forms, the Grievance process, committee role and responsibilities and the Board process
- **Grievance Packet** - complainant’s grievance form, signatures and support documentation
- Signed Grievance form, support documentation
- **Grievance Committee**- Three member committee who are neutral and impartial, that will review the current grievance
- **Board Grievance Liaison (BGL)**- Board member that is the point of contact for person filing grievance
- **Complainant** - Person/member filing the grievance, complaint, or request for mediation support and conflict resolution.
- **Respondent** - Person/member the Grievance is against, person named in the grievance, informal grievance or mediation.
- **Support Person** - Both parties may have a support person to help them through the Grievance process.
- **No hearing of Grievance investigation findings** - No further action required.
- **Mediation of Grievance investigation findings** - A mediator (neutral party) to mediate the Grievance between the complainant and respondent.
- **Hearing on Grievance investigation findings** - After the Grievance findings have been sent to both parties, if the Board votes that a hearing is necessary, a date is set for the Respondent to speak and be interviewed by the Board.
- **Procedural justice/fairness** - is the idea of fairness in the processes that resolve disputes and allocate resources. Procedural fairness is concerned with the procedures used by a decision-maker, rather than the actual outcome reached. It requires a fair and proper procedure be used when making a decision for all involved.

## Suggestions for Conflict Resolution

When conflict arises within the Ortho-Bionomy community we encourage a process of resolution that preserves the integrity of all parties involved. Disagreement and conflict are a part of all communities and most relationships.

Turning away from conflict is likely to lead to negative feelings and disharmony, not only for those directly affected by the conflict but the community as a whole. Silence, rationalization, assigning of blame, minimizing what happened and an unwillingness to listen are some of the ways that leave conflict unresolved. Whenever possible, disputes and disagreements should be settled directly between the people concerned.

We recognize that some conflicts may require a formal resolution process and the Society has a formal grievance procedure. The formal process may be used for disputes concerning administrative actions, trademark violations and for member misconduct and or violations of our Code of Ethics.

For a formal grievance please contact the Board of Directors or the Society office as soon as possible. For clarification regarding a grievance, you may read through this handbook and if not clear, contact the SOBI Office.

There are many ways to achieve resolution, the following are some suggestions:

### A) Preparing Yourself

Before contacting those involved in the conflict, we recommend that you prepare yourself and consider the following:

**1) Timeliness:** While it is usually helpful to allow reactive emotions to settle before attempting resolution, it is important to attend to matters of dispute or misunderstanding without undue delays. If too much time passes, the other person may not accurately remember the event and unexpressed feelings may grow out of proportion, making resolution of the situation more difficult.

**2) Reflection:** Look within yourself and identify how your own actions, reactions and interpretations may have contributed to the conflict. Find out whether you are deriving benefit from the conflict even though it feels uncomfortable. Some questions you might ask yourself. Is there a “secondary gain” that you may not have been aware of? Is this situation a recurrent pattern in relationships for you? What fears do you have around the issue?

Keep in mind that misunderstanding can occur on many levels within us and between us and be willing to acknowledge that you may not know all there is to know about the situation.

As a practitioner of Ortho-Bionomy, remember what it is like to be curious, open and in the spirit of non-judgmental awareness to be willing to recognize that we all do the best we can at any given time. If we could do differently, we probably would and sometimes a conflict, illness or problem can be the doorway

to more choices, skills and understanding. Be curious, open and willing to recognize that we all do the best we can at any given time.

Exercise your ability to empathize and see the larger picture. Imagine yourself stepping into the other person's shoes and be curious about what happened for the other(s), how they may be feeling or viewing the situation.

Taking the time to reflect on the person(s) involved and the misunderstanding as separate and parts to the whole process towards resolution will exercise your ability to empathize and see the larger picture. Separate the people from the problem. Focus on interests, commonality, options for mutual gain rather than on positions. This may help you to put things in perspective and to soften your communication with the other person(s).

**3) Imagining a Best Case Scenario:** Identify and then actively imagine resolution(s) of the situation. Imagine the best possible way a face to face meeting may take place and identify how you and the other person(s) involved could grow and learn from the experience.

### **B) Asking for Help and Receiving Support:**

**1) Seeking Advice:** To gain perspective and inspiration about dealing with a conflict, it may be helpful to talk to someone and seek advice on how to resolve the conflict. Remember to accept responsibility for your role in the situation when you talk to friends or other Society of Ortho-Bionomy members so that you are seeking advice rather than simply gossiping about a fellow member. You may also contact the SOBI National office for assistance.

**2) Achieving Resolution with Assistance:** When a situation is emotionally charged, it may be helpful to invite one or more uninvolved persons to take part in the conflict resolution. A third party may simply be a silent witness, providing a sense of calm and neutral presence, or may be an active participant who helps to ensure that each person is given uninterrupted opportunities to speak and helps to clarify what has been said. This person may also help distinguish opinion/blame/interpretation from direct statements of what happened and what feelings were experienced. Facilitators can be anyone whom both parties trust and respect, such as friends, neutral acquaintances, Ortho-Bionomy Instructors or Practitioners, or someone trained to be impartial in mediation.

### **C) Resolution**

To achieve resolution, it is usually necessary to get in contact with the person(s) involved in the conflict. This may happen in a face to face meeting, by telephone, by letter or a combination of the above. The following guidelines and suggestions are meant to support in the process of clarifying what happened, what interpretations and meanings the different parties have ascribed to the events and what may be needed to resolve the conflict.

A practice of applying the principles of Ortho-Bionomy with all persons involved in this dispute is a chance for everyone to be heard in an environment of respect, fairness and goodwill.

**1) Stating the Facts:** You may want to open the conversation by stating your hoped-for outcome, if that feels appropriate. Otherwise start with what happened as best as you remember. Share the events in chronological order so it is easy for the other persons to follow what you are saying. A crucial aspect of

conflict resolution is discerning between our interpretations and opinions of what took place and a factual description of events. Realize that another person may believe as strongly in their interpretation of what happened as you believe in yours. In this process, state the events as clearly and simply as possible. Then state how you felt about and interpreted those events. Specifics are essential. Focus on what occurred to create this conflict rather than on positions or personalities when possible.

**2) “Active Listening” and the Opportunity of “Being Heard”** It is important that everyone be given an opportunity to be heard, to recount the event as they remember it, to state their feelings regarding what happened, and to declare the goals they have for its resolution. In face to face meetings or phone conversations, preparing notes to help you stay focused on what you want to communicate or even having a written account that you can read is likely to reduce the emotional charge and ensure that you include everything that is important to you. Keep your statements factual rather than blaming or defensive.

For instance, rather than saying: “You humiliated me by the way you talked to me in front of...” use the following formula for clear communication: "When you (said, did...) \_\_\_\_\_, I felt (humiliated) \_\_ rather than (how you wanted to feel, were hoping to feel) \_\_\_\_\_, because I \_\_\_\_\_.

When differences in perception, feelings of frustration and anger, and difficulties in communication are acknowledged and addressed, each party may then be able to better understand the interests and sensitivities of the other party. Separating the people from the problem allows you to deal directly and empathetically with the other person as a human being, hopefully making it possible to reach an amicable agreement. Then, the parties involved can generate options and goals that are mutually satisfying and come to an agreement that will not harm and improve this particular relationship and the community in general.

Allow adequate time for a calm, deliberate and complete account of the situation from all parties concerned.

### **3) Restating What Was Said.**

To facilitate understanding, it is helpful for each party to briefly restate or summarize what the other has said, highlighting what was most important. For this to work, the listener must have the opportunity to summarize after a few sentences rather than trying to remember a fifteen or thirty minute speech. After the restatement, the other party says whether the restatement is accurate and complete or clarifies it, if needed. Not only does this process make sure that the speaker has the listener's full attention, but it also helps to divide the issue into manageable chunks and allows for misunderstanding to be cleared up quickly rather than letting them influence the listener's perception of the whole issue.

This process of listening attentively and being understood may be the first and sometimes only step necessary to resolve the conflict, as it clears up misunderstanding and brings to light sensitivities and prior history that the other person may have been unaware of.

### **4) Accepting Personal Responsibility.**

When each person takes responsibility for her/his contribution to the conflict, resolution and reconciliation is greatly facilitated. Even when one person seems to be more responsible, it is important

for all parties to assess and own their contribution to the misunderstanding. Assuming personal responsibility is more likely to provide a safe, more trusting environment which allows everyone involved to open up, speak the truth, gain understanding, and possibly apologize for their part of the conflict and move forward towards a desired outcome. In addition to improving the climate for the conversation, accepting personal responsibility for a situation is empowering. It provides the opportunity for each person to leave the "victim role" and to realize that they are in charge of their own perceptions and change.

Rather than making resolution dependent upon an outside force or person, we can decide on the changes we need to make within ourselves to accept personal responsibility and therefore diminish the pressure for the other person to act differently than they do.

#### **D) Documenting a Dispute.**

If you have gone through the above steps and have not been able to arrive at an agreeable resolution or if you feel it is important to file the complaint even though the conflict was resolved, use the enclosed form to report your general "Conflict or Dispute" to the Board of directors (c/o SOBI National Office). Your report will be recorded and filed. Someone representing the Board will contact you to acknowledge receipt of the complaint, make suggestions or offer further support for resolution, as needed.

If it is requested, or if the Board deems the situation beyond the level of a general "Conflict or Dispute", "Guidelines for Filing a Formal Grievance" will be sent to you and the case will be forwarded to the Grievance Committee for formal investigation.

Disagreement and conflict are a part of all communities and most relationships. When resolution is not easily achieved, we can imagine that learning and healing needs to take place on a deeper level. We offer this process in hopes of facilitating that healing and learning for all concerned.

**Filing: File a Complaint/Request for Conflict Resolution or File a formal Grievance  
- How complainants (members and nonmembers) file**

**Complaint or Request for Conflict Resolution Support filing:**

A complainant, member or nonmember, requires conflict resolution support with a member (Respondent). The complainant does not want to file a formal grievance that would go to committee, and feels it can be resolved in a less formal manner. This may be a request for conflict resolution third party support or mediation. The process includes completing the form requesting conflict resolution support on a complaint, and providing support documentation regarding the complaint. Complainant has an issue or challenge with a member that requires support to address.

**A. Complaint/Request for Conflict Resolution Filing & Follow On Process:**

- Complainant pulls Complaint and Grievance handbook on SOBI website, and chooses option of Complaint
  - Complainant obtains and submits a Complaint packet
    - Complaint/Grievance form -with Complaint selected
    - Support documentation for Complaint
    - Complainant release of information form
    - Sent via email to [office@ortho-bionomy.org](mailto:office@ortho-bionomy.org) or by fax 317-536-0065.
  - See appendix for Complaint packet forms
- By choosing Complaint, complainants are supported by the Board Grievance Liaison without the formal Grievance and Grievance committee process.
- The Board Grievance Liaison emails the complainant
  - to confirm next steps and support, which could include
    - setting up a conference call
    - mediator
    - inquiry
    - support person for the complainant
  - Contact with Respondent will be set up accordingly

**B. Grievance filing**

A complainant, member or nonmember, believes there has been a breach in Code of Ethics, and requires a formal Grievance to go to a Grievance committee. They have read through the Conflict Resolution and Complaint option, and feel their complaint better meets the formal Grievance process. The process includes completing the form requesting Grievance filing and providing support documentation and forms regarding a potential Grievance against a member.

**The process to file a complaint or grievance packet:**

- Complainant obtains and submits a Complaint/Grievance packet
  - Complaint/Grievance form -with either Complaint or Grievance selected
  - Support documentation for Complaint or Grievance
  - Complainant release of information form
- Sent by email to [office@ortho-bionomy.org](mailto:office@ortho-bionomy.org) or certified U.S mail to the Society of Ortho-Bionomy International®, 5335 N. Tacoma Ave, Ste 21G, Indianapolis, IN 46220, by e-mail to [office@ortho-bionomy.org](mailto:office@ortho-bionomy.org), or by fax 317-536-0065.
- See Addendum for Complaint/Grievance packet forms



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**Complaint and Grievance Form**

I wish to file an:

- Complaint** – Request for Conflict resolution/mediation support
- Grievance** - Formal – Request will go to Grievance Committee

**Important:** Please Print or Type

Date:

**Complainant Name** (person filing):

Address:

Telephone:

E-Mail:

Best time to reach you: daytime \_\_\_\_\_ evenings \_\_\_\_\_

**Name of Subject of this Complaint** (Respondent):

Contact information of respondent (if known)

**Code of Ethics believed to be breached:**

**Nature and outline of the Complaint** (attach additional sheets if necessary). Please be specific.

The information given above (and attached) is true and accurate to the best of my knowledge. I realize the serious nature of filing a Complaint or Grievance. I recognize that the Grievance Committee will not be able to take action without my cooperation to provide additional information if needed. I understand that a copy of this complaint will be sent to the individual named above as the subject of this grievance in accordance with his/her legal rights.

Signed \_\_\_\_\_ Date \_\_\_\_\_



### **The Role of the Grievance Committee**

- The committee embodies neutrality and impartiality.
- Support and take the parties, in the grievance, from the past issues to some sort of resolution in the future for the Board to review.
- Equal support to both parties in their recommendation to the Board.
- Conduct preliminary investigation and determine breach of Code of Ethics
- Recommend or assist in conflict resolution.
- Complete a full investigation if it feels warranted.
- Provide a full report in writing at the conclusion of the investigation.
- Keep confidentiality around the Grievance process.

### **The Role of the Board Grievance Liaison**

- The Grievance Board Liaison embodies neutrality and impartiality.
- Equal support and communication to both parties.
- Outlines the possible ways a complaint can be processed - Informal & Formal.
- Recommend or assist in conflict resolution.
- Keep confidentiality around the Grievance process.
- Follows up with the Grievance committee to support a timely response.
- Responds in a timely manner to all parties:
  - Even if the response is we have received your question and will get back to you
  - Try to include a date/range of time for response i.e. by next week
  - If can't respond in the timeline given, email to let them know of the new timeline
- Throughout the process - the Board Grievance Liaison communicates with the Board:
  - Status/Timing of the Grievance process
  - Informs Board of Requests for Board documents and gets approval from the Board to send
  - Requests for Board Response from committee, respondent or complainant on behalf of the Board need to be approved by the Board prior to being sent
  - Follows up with Board to assist with a timely response
  - Does not share details of the Grievance or prior Grievances outside of the Board

### **Timeline and Outline of Steps in the Complaint & Grievance Process**

This is an outline of the steps of the Grievance process. The goal is to be a process of seventy-five days or less, with the understanding that it will not be a process that is rushed. Details on the sections of this process are outlined in this document.

#### **Stage One – Complainant Reviews Complaint and Grievance Handbook, reviews the Conflict Resolution suggestions, and choose to File a Complaint or Grievance**

- Complainant has an issue or challenge with a member (Respondent) that requires support to address.
- Complainant opens Complaint and Grievance handbook from SOBI website
  - Reads through and processes the Conflict Resolution suggestions
  - If they feel they need additional support:
    - fills out the Complaint and Grievance form
    - compile support documentation
    - and chooses the option of Complaint, or option of a formal Grievance
- If chooses Complaint, they are supported by the Board Grievance Liaison without the formal Grievance and Grievance committee process as outlined in Complaint section of this handbook
- If chooses Grievance, they are requesting the formal Grievance process, with Grievance committee as outlined in this handbook.

#### **Stage Two-The set up of Grievance process**

- Grievance is received from Complainant by the SOBI Office.
- SOBI Office replies to the complainant that their grievance was received by the Office, confirms that it is complete, and will forward the grievance confidentially to the Board Grievance Liaison.
  - SOBI Office includes within the email response, a receipt of the email, the full complaint or grievance packet submission received from the complainant, having the complainant confirm the packet includes:
    - the complaint or grievance request form
    - support documentation of the complaint or grievance
  - If it is multiple documents or emails, the Office will combine the documents into a PDF and have the complainant confirm the packet is complete.
  - The complainant confirms that the packet is complete and ready to go to the Board Grievance Liaison
  - This is a confidential communication, and will be forwarded to the Board Grievance Liaison
- The Board Grievance Liaison informs the complainant that they have received the complaint or grievance. The Board Grievance Liaison will request that the complainant reconfirm they have received the complete Grievance packet.
- The Board Grievance Liaison informs the Board that there is a grievance filed
- Board votes for the Board Grievance Liaison to have permission to
  - start the Grievance process
  - contact the parties
  - contact Ombudsman/Grievance Committee Chair
- The Board Grievance Liaison emails both parties, the complainant and respondent,
  - to inform them that a Grievance has been filed
  - that a Grievance Committee is being formed.

- The email from the Board Grievance Liaison will include a copy of the Grievance handbook, the grievance, which the complainant has confirmed is the complete packet - grievance filing and support documentation
- If there is not a current Grievance Committee, the Board will vote for the Board Grievance Liaison to have permission to begin the process to gather a Grievance committee, using the Guidelines in this document
- Board Grievance Liaison sends the Grievance Committee form and letter of confidentiality for their signatures
- Board votes to approve the Grievance Committee members
- Board Grievance Liaison accepts, signs and returns the executed document on behalf of the Board

### **Stage Three- The Grievance Committee**

- Grievance Committee designates the Chair.
- The Grievance Committee will implement the Grievance process with procedural fairness/justice which includes the principles of Ortho-Bionomy.
- Chair sends an email to both parties (complainant and respondent), letting them know the committee is formed and will be in contact. Chair lets the complainant know the committee has the grievance. The Chair has the complainant reconfirm the committee has the full and complete Grievance packet.
  - Chair lets the respondent know the committee has the grievance. The chair confirms that they received the Grievance Packet.
  - The Chair confirms both parties have a support person. If they do not have a person to support them, the Grievance Committee will assist them to find a support person to help them through the Grievance process. Ex. Be silent witness when the party is being interviewed by the Committee. Person for both parties to have as a sounding board. It is not up to the Support person to resolve the issue.
- The Grievance Committee has a neutral and impartial discussion of the Grievance packet.
- The Committee interviews both parties, and the parties provide their responses in writing.
- Throughout the process - the Board Grievance Liaison communicates with the Board
  - Requests for Board documents has to be approved by the Board to send
  - Responses on behalf of the Board need to be approved by the Board
- If after the initial interviews, the Committee determines the Grievance does not need to move forward, the Board Grievance Liaison alerts both parties of the finding.
- The Chair alerts the Board Grievance Liaison whether the investigation will or will not need to proceed.
- The Committee may conduct additional interviews and continue to investigate the Grievance.
- The Chair notifies the Board Grievance Liaison that the investigation is complete.
- The Committee discusses and compiles their recommendations for the Board in a report including response to the questions in the Grievance Committee handbook listed in detail in the Grievance Committee handbook.
- The report from the Grievance Committee to the Board includes the following:
  - Grievance committee report form, a summary which includes:
    - the complainant and respondents' names
    - a brief description of the original Grievance
    - Committee conclusions and recommendations
  - Details of the Grievance process that back up the findings
  - the issues underlying Grievance

- the agreed common facts
- the information gathered from the interviewing process
- the conclusions and the recommendations to the Board from a neutral and impartial perspective.

The Grievance Committee will state and sign that this Grievance has been implemented with procedural fairness.

- The Committee forwards a PDF version of their report to the Board Grievance Liaison with a copy to the Office for file.

#### **Stage Four-The Board**

- Board Grievance Liaison forwards the report to the Board.
- Board members will review the report.
- Board can ask questions or inquiries to the Grievance Committee through the Grievance Committee Chair.
- Board votes for the report to be sent to both parties (complainant and respondent), informing both parties that the Grievance Committee portion of the investigation is complete, and the Board review has begun.
- Board discusses the Grievance Committee findings, and next steps.
- Board can again ask questions or inquiries of the Grievance Committee through the Grievance Committee Chair.
- When the Board discussion is complete, the Board votes on next step - Mediation, Hearing, No Action.
  - Board alerts both parties of next step - No Hearing Required, Mediation, Hearing, No Action. See below for more details regarding these three possibilities.
    - Board Decision, no Hearing required,
  - Hearing, the Board votes on the date of hearing,
    - Board Grievance Liaison provides minimum of 15 days notice of the hearing date via email and mail.
  - Mediation
  - No Action
- Board compiles final recommendations.
- Board votes on final recommendation.
- Board Grievance Liaison forwards formal recommendation to both parties.
- Board of Directors shall decide whether or not a member has engaged in conduct seriously prejudicial to the interests of the Society and should be expelled, or whether some lesser course of action or redress would be best for all involved.
- Party has right to appeal within 15 days of the Finding by mail or email.
- The Appeal may require a second investigation.
- Within 30 days of received appeal, the Board will appoint an ad hoc committee. This ad hoc Grievance Committee will address both the findings of the Grievance Committee and the action taken by the Board in response to the original Grievance Committee's report.
- The Grievance Ad Hoc Committee will follow the same procedure as the Grievance Committee.
- The Grievance Ad Hoc Committee will report their findings to the Board.
- No more than one appeal may be made for any investigation.
- The Board votes on the final decision.
- Board notifies both parties of their decision and includes it, dated, on final report.

- The decision of the Board of Directors shall be final.

### **Confidentiality**

All investigations are sensitive and must be kept confidential. Only the Grievance Committee members, the Board of Directors and Legal Counsel (when appropriate) will have access to the records regarding a grievance.

### **Conflicts of Interest**

Anyone who is a party to any of the investigated activities or with any direct involvement in the case or personal ties to the parties in the case will not serve in the investigation or resolution of the grievance.

### **Board Member Involvement**

If a Board member is a party to any of the investigated activities or has any direct involvement in the case or personal ties to the parties in the case they will not serve in the investigation or resolution of the grievance.

They will recuse themselves and are not involved in process or vote.

If the board member is the respondent, ie has the Grievance filed against them, they will voluntarily remove themselves temporarily from the Board. If the Board member does not voluntarily remove themselves, the Board may decide that due to the complaint, it would be best for the organization to direct them to be temporarily inactive until the Grievance process is complete.

### **Legal Issues**

As an investigation proceeds, any party involved in a grievance or its investigation who recognizes a potential legal impact on the Society due to the activities under investigation will notify the Board of Directors as soon as possible.