

Investigation Tip Sheet 1

Meeting with Your Member

Preparing for the First Meeting

The member contacts you. This could be the complainant or respondent. Ensure that you are speaking to the member in a private location/situation. Always try to make the member feel as comfortable as possible. Listen intently to what they have to say. Give the member your undivided attention. Turn your cell phone off.

Gathering Information

Take detailed notes! **Always take detailed notes.** Always ask questions. The W5 (Who, What, Where, When, Why and How). You need to gather as much information as you possibly can to start building your case file. Request copies of any e-mails, letters, speedy memos etc. that the member might have in their possession.

Strongly encourage the member to make their own notes or a chronology of events.

There are a couple of reasons why:

1. It can be therapeutic.
2. More importantly - it helps keep points straight, many times it will jog the members' memory and possibly bring up other issues or recollections of things/events/times/places. This will help establish a foundation for the members' version of events. This will also help to add to the credibility of the member. **(Remember that credibility is always weighed by investigators and arbitrators in drawing their conclusions on the case)**

Having the member make notes also provides you as the representative some additional documentation for the case file.

This process may take several days and will probably require a follow-up meeting(s).

Building Your Relationship with the Member

Try to be understanding, don't be cavalier, no matter how embarrassing the situation may be to the member

Ensure confidentiality as much as you can. Advise the individual that at some point information will have to be disclosed.

It is very important to gain the trust and confidence of your member at this stage. The member is likely upset, emotional, and irrational and might not be thinking straight.

Make sure that you feel safe and that the member is not a danger to you, your co-workers or themselves.

A Note of Caution:

Do not get caught up in the emotions. As the representative you need to keep a cool head and the facts straight. You can't afford to get emotionally attached – for your sake and the members.

You also need to be very aware of manipulation and avoid getting drawn in. (Transference)

Remember that empathy is appropriate but sympathy will hurt you.

Very Important: You need to start building your case file.



MEMBER EDUCATION