

## Documenting an event

---

<b>Date Time Location</b>	<b>Who was involved</b> (include witnesses, anyone who saw or heard what happened)	<b>Describe the Situation or Event</b> State words used, as well as tone and describe behaviors, & gestures (include non-verbal)	<b>Describe the Impact</b> a) on your ability to do your job b) personal impact <small>Consider Suppression Techniques: felt invisible, ridiculed, withholding information, shame &amp; blame, double bind (no right answer)</small>	<b>Desired Outcome:</b> What do you feel would appropriate remedy(ies)

Submitted to: \_\_\_\_\_ Employee Name \_\_\_\_\_ Signature \_\_\_\_\_  
Date: \_\_\_\_\_

## Documenting an event

---

While some interactions in the workplace may be upsetting and hurtful, it may not be bullying in the way of showing: a repeated and persistent pattern of behavior, may become worse over time, occurs with a (perceived) imbalance of power, is intended to offend, humiliate, intimidate

Documentation can help to establish if there is a pattern of behavior and can help guide you and the employer in taking constructive action to stop it. You may not be able to document in the moment but even brief notes will help in memory recall. In establishing if there is a pattern of bullying toward you by one or more co-workers you may be recording several events unless a single event is extreme and requires immediate action.

1. **Date, time and location.** Be as accurate as possible. But it is better to state that it was 'at *approximately* 11:30 in the morning', unless you are absolutely certain. The other person may counter that they did not arrive until 9:45. Identify the location not just as being 'at work' or in 'a restaurant over lunch' or, 'at a meeting.' Remember the workplace is not confined to the building where you normally work, but any location, even somebody's home if it is in the course of a work-related event. Identify if this has happened more than once.
2. **Who was involved?** You are naming the person as well as other people who may have seen or heard what happened. Is there someone who did not directly witness the event, but who you immediately spoke to. For example, "I left the floor and spoke to Jean, who could see that I was upset, angry, tearful, frightened, etc."
3. **Describe the situation or event.** Be specific and brief, stick to the facts, or use point form to identify what was said or done, and include non-verbal gestures, expressions, actions. Example, "Bob came up to me in the lunch room and started yelling and swearing. He said.....Jim, Julie and Janice were also at the table and looked embarrassed. Jim told Bob to take it easy, but he continued to yell at me and blamed me for not having gotten the order out on time, Julie looked scared. Janice got up and left. I tried to explain why the order was late, but Bob cut me off by putting his hand in my face."
4. **Describe the Impact.** Following the example above, "I couldn't finish my lunch and went back to work with a lump in my stomach, and could hardly work the rest of the shift. I felt bad for Julie who looked scared and I felt intimidated and angry at Bob who has publicly yelled at me on other occasions (see earlier documentation). He does it when other people are around, instead of taking me aside and asking me first. The order didn't go out in time because it needed Bob's signature and he wasn't there, but he blamed me anyway. I felt the rest of the group ignored me for the rest of the day, and I had no one who I could talk to until I got home. I still couldn't eat supper and wasn't able to get to sleep. I was thinking about how Bob treats me. I am ridiculed and blamed and Bob lets me and everyone else know he thinks I am a screw-up. I was so tired the next morning I had to call in sick, which was going to put me and the rest of the team behind."
5. **Desired Outcome.** We want it to stop! How will we know by actions and words that things have changed. For example, If Bob made a sincere apology so that I know he realizes how his words and actions have affected me I might be able to let it go because he would be less likely to do it again. But Bob has been spoken to in the past and is not likely to apologize. I believe Bob should have some skills training, like listening, being respectful, or anger management, but management may not go for it. Be specific and concrete. Consider what is actually do-able. Examples:
  - Obtain agreement from 'Bob' that issues will not be presented or discussed in front of co-workers as such conduct can seriously impact other coworkers and team dynamics.
  - Agreement that either 'Bob' or myself are free to say, without an immediate response from the other party, "That didn't feel/sound/look... respectful".
  - Agreement that you will greet each other with a simple "Hi", "Hello", or "Good-morning" to acknowledge the other person and set the tone for the day with other workers as well.
  - Have a brief meeting, initially weekly, facilitated, mediated, or coached as appropriate by a 3rd party who is mutually agreed to co-worker/manager/steward.... Specific situations might be responded to/resolved at these weekly meetings.

**Submitted to:** \_\_\_\_\_ . Sign and Date when you are submitting your documentation. You may have been documenting over time and several events are recorded . **Keep a copy for yourself.**