

Human Resources and Talent Development

PSA Advocate Checklist

One of the roles of the PSA Advocacy committee is to review concerns on behalf of the professional staff, and if necessary, act as an informal mediator between professional staff and the administration.

Often times, the PSA Advocate is called upon to assist a PSA employee during an investigatory interview when a supervisor is questioning an employee to obtain information which could be used as a basis for discipline or is asking an employee to defend his or her conduct.

Investigatory interviews usually relate to subjects such as:

- ✓ absenteeism
- ✓ dishonesty
- ✓ insubordination
- ✓ tardiness
- ✓ poor attitude
- ✓ work performance

The following checklist has been provided as a guideline for the PSA Advocate:

- The Advocates' role is to assist and counsel the employee during the interview
- The Advocate should be aware of the subject of the interview
- The Advocate is allowed to speak privately with the employee before the interview
- During the questioning, the advocate may object to the relevancy of a question or clarify a vague question.
- The Advocate may not obstruct, delay or otherwise prevent an investigatory interview.
- If the Advocate perceives that the interviewer is using an unprofessional tactic, they may question it under relevancy or professional conduct.
- The advocate can serve as a witness to prevent false accounts of the proceedings.
- At the end of the interview the advocate may contribute additional facts/information in support of the employee's version.

Please keep in mind; non-union employees do not possess a right to have a coworker accompany them to an interview with their employer. The University has extended this opportunity for the PSC to have a PSA Advocate present in the interest of fairness.

How to Prepare for the Meeting:

- Familiarize yourself with relevant policies
- Ask the employee why the process is taking place

How the Meeting is Conducted:

Investigatory Interview
The purpose of the investigatory interview is to gather as much information as possible to determine appropriate disciplinary action, if any, for the employee that violated the University's rules and regulations
The employee will be informed that the meeting is an investigatory and not a formal hearing
The employee will be made aware of the nature of the complaint made against him/her
Detailed questions and explanations put forward will be reviewed until the investigator is satisfied that all of the facts have been obtained
Each side should have someone taking notes at all times
At the end of the interview the investigator will summarize the total situation prior to adjournment. The summary should reflect the key points of the interview: ✓ Key points of the case ✓ How these have changed during the interview ✓ Key points raised in reply ✓ Matters to be checked