

**Workplace Bullying: Investigation Plan**

Name of Complainant: Name of Respondent: Name of Investigator: Summary of the Complaint:

# Notification of Parties

|  |  |  |
| --- | --- | --- |
|  | **Communication Method** | **Date of Communication** |
| Complainant |  |  |
| Respondent |  |  |
| Witness |  |  |
| Witness |  |  |
| Witness |  |  |

# Interview Schedule

|  |  |  |
| --- | --- | --- |
|  | **Location** | **Date and Time** |
| Complainant |  |  |
| Respondent |  |  |
| Witness |  |  |
| Witness |  |  |
| Witness |  |  |

**Interview Schedule with (Complainant)/(Respondent)**

Date: Investigator: Scribe:

|  |  |  |
| --- | --- | --- |
|  | **Response** | **Findings/Comments** |
| Allegations (based formal/informal complaint….) |  |  |
| Allegation #1 |  |  |
| Allegation #2 |  |  |
| Allegation #3 |  |  |
| Allegation #4 |  |  |
| Allegation #5 |  |  |
| Other:  Is there anything else you think I need to know which is relevant to the issue raised?  Are there names of witnesses you think relevant to the matter at hand whose names you want to put forth? If so, what incident or allegation do you think they have information about?  Is there documentation that you think relevant to the matter at hand and, if so, what is the documentation? |  |  |

# Findings of Fact:

Upon review and analysis of the evidence, I make the following findings of fact:

# Did the behavior constitute bullying?

Based on my findings of fact, I find that the behavior did / did not constitute bullying for the following reasons:

# Recommendations:

I recommend the following:

