

Calgary IMS Issues and Grievance Policies and Procedures

An important function of the CIMS Board of Directors is to encourage an intention of mutual respect and reconciliation when issues arise that are related to or impact our ability to serve our members and the general public according to our mission and values.

Through the course of Calgary IMS's work, it is natural that difficulties may arise from time-to-time between individuals due to the varied nature and needs of both ourselves and the people we serve. Issues may present in a number of ways, including, but not exclusive of the following:

- Between Calgary IMS directors
- Between Calgary IMS members or non-members and directors
- Between Calgary IMS and teachers or leaders who provide services to Calgary IMS (e.g. teachers, other facilitators, caterers, facility operators, etc.)
- Between participants in Calgary IMS programs, retreats, workshops, etc.
- Between participants in Calgary IMS programs and the teacher/facilitator or other leader of the program¹

A. Standard Issues Management

It is our policy to encourage individuals to seek to respectfully resolve issues or disputes directly with one another. Calgary IMS Directors reserve the right to not intervene in cases where the primary issue is one of personality or interpersonal conflict and/or not likely to negatively impact Calgary IMS's normal operations or reputation.

However, there may be occasions when issues or events are of concern to members and/or the Board of Calgary IMS. In these cases, it may be appropriate for the Board of Directors to attempt to mitigate the situation:

- For immediate danger to health or safety, emergency services (911) should be called, where appropriate.
- Where a leader directly witnesses or is advised of an incidence of behaviour or communication which appears to negatively affect individuals involved in the delivery of or participation in Calgary IMS activities, the leader may choose to respectfully and mindfully address the situation at that time. The leader will complete an incident report and share it with the Calgary IMS President (or other Director, if the leader is the President).
- If it's not appropriate for the leader to address the incident at the time, the leader will bring the matter to the attention of the Calgary IMS Board of Directors at the earliest possibility to determine what, if any, actions should be taken to address the situation.
- Where an individual's behaviour may pose significant risk to his/her health or safety or that of others, but is not an emergency, the leader must consider her/his own capacity to intervene, his/her personal safety and comfort, and the safety and comfort of the group, as well as the safety of the individual causing the disturbance. If necessary, the individual may be asked to leave or the event may be cancelled to allow others to remove themselves from the situation.
- An incident report will be made as soon as possible by the leader present at the time of the incident, or to whom the incident was reported. The incident report will be shared with the Calgary IMS President

¹ For the purposes of this policy statement, "leader" will refer to Directors, teachers, or anyone else engaged by Calgary IMS to deliver or enable the delivery of Calgary IMS programming and/or other activities.

(or other Director if the President completed the report) and will be kept as a record by the Secretary.

- Following receiving an incident report or other notification of an incident, the Calgary IMS President will notify the Board of Directors in a timely manner. If the President is the intervenor, he or she must inform at least one other Director as soon as possible, and the rest of the Board must likewise be notified in a timely manner.
- When a leader has intervened, or has chosen not to intervene, and the Board and/or complainant still seek resolution regarding the matter, the Board of Directors may consider further action. This could include but is not limited to the following options:
 - To set the matter aside if it is deemed outside Calgary IMS's purview or capacity to address and/or is not likely to significantly impact Calgary IMS operations, reputation, or those involved in delivering or participating in Calgary IMS activities.
 - If appropriate, to invite or accept an invitation for a conversation between members of the Calgary IMS Board of Directors and the relevant party or parties to determine the best way to resolve the issue.
 - In the case of conduct which poses a threat to the safety and/or unhindered participation of individuals in Calgary IMS activities, or the delivery thereof, Calgary IMS may issue a warning or impose a sanction:
 - To do so, at least two directors (after consultation with the complainant if a director was not a witness to the incident) must be involved in the decision and the remainder of the Board notified in a timely manner after the incident.
 - As soon as possible after imposing a sanction, the Board will review the sanction conditions and time period for which it is in effect. The individual to whom the sanction applies will be informed of the conditions and time period.

- **Grievance Process**

The measures described in Section A must be attempted prior to moving to the formal Grievance Process. In the rare occasion where a formal intervention may be necessary, the Board may invite the complainant to submit a grievance request.

- A formal grievance may also be initiated by any person involved in a dispute or complaint, provided the other avenues described in Section A for issues management have been attempted.

The Grievance Procedure is as follows:

1. A formal grievance request is made

A formal grievance is initiated by communicating in writing with the Calgary IMS Board of Directors. This letter of request must include:

- A clear statement that a formal grievance process is requested.
- The name of the person(s) whose behavior the complaint concerns.
- A description of the issue sufficient enough to allow the CIMS Board of Directors to decide whether the complaint is appropriate for initiating a formal grievance procedure.
- A history of the attempts, if any, to resolve the issue through other means.
- A statement about the resolution desired.

2. The Board considers the request

The Calgary IMS Board of Directors will consider the request at its earliest convenience.

- The Board reserves the right to set the matter aside if it is deemed outside Calgary IMS's purview or capacity to address and/or is not likely to significantly impact Calgary IMS operations, reputation, or those involved in delivering or participating in Calgary IMS activities.

- As part of its considerations the Board will contact the party or parties named in the complaint to inform them of the issue and provide appropriate details of the complaint and next steps in the grievance process. The information provided may, at the Directors' discretion, include a copy of the letter requesting the formal grievance. As well, the Board at this time will offer the party or parties named in the complaint an opportunity to respond to Director(s) regarding the issue.
- Prior to making a decision to proceed with the formal grievance, the Board will carefully consider information provided by both the complainant and party/parties named in the complaint.
- Where a grievance is against the Board of Directors, the Board will invite a third party from the Calgary IMS registered membership to participate in consideration of the request.
- Where a grievance is filed against individual Directors, the Board will consider the request and, at its discretion, may also choose to invite a third party from the Calgary IMS registered membership to participate.

3. A determination is made to accept or deny the formal grievance

- If on reviewing the request the Board determines a formal grievance is appropriate, it must convey its acceptance within in a timely manner to both the person filing the complaint and the party/parties named in the complaint.
 - If the party/parties named in the complaint have not already been provided with the original letter of request, a copy must now be provided.
- If on reviewing the request the Board determines a formal grievance procedure is not appropriate, both the person making the request and the party/parties named in the complaint will be notified as soon as possible. The notification will include the Board's decision and the reason for declining the grievance.

4. A Resolution Committee is formed

Once a complaint is accepted, the Calgary IMS Board of Directors will form a Resolution Committee consisting of 3 members. This committee will investigate, issue findings, and render a decision on the complaint.

- The Calgary IMS Board of Directors may also appoint one of its members to be a moderator of the process who guides the procedures but does not participate in any decisions.
- Where a grievance is against the Calgary IMS Board of Directors, the Resolution Committee will include a third party from the Calgary IMS registered membership.
- Where a grievance is filed against individual Directors, the Board may, at its discretion, choose to invite a third party from the Calgary IMS registered membership to participate.

5. The Resolution Committee investigates the complaint

- The Resolution Committee will give the complainant and the party/parties named in the complaint a chance to present their understanding of the issue under investigation. The committee may at its discretion, interview these persons separately or together, and may request additional information.
- The proceedings will be documented by a member of the resolution committee. Audio of the proceedings may be recorded with the permission and knowledge of all parties involved. Any recordings are the property of Calgary IMS and will not be distributed to either party.
- The Committee may ask other individuals to provide information pertinent to the complaint.
- The complainant and the party named in the complaint will have a full and fair opportunity to respond to all information gathered by the committee.

- Except for informing the Calgary IMS Board of Directors, the proceedings will be held confidentially for the duration of the proceedings. In instances where the Board deems it necessary to inform other pertinent parties, the complainant and person(s) named in the complaint will be informed that the information is being shared.

6. The Resolution Committee renders a decision

- When the Resolution Committee members are satisfied they are adequately informed they will review and discuss the case among themselves.
- At its discretion, the Committee may seek non-binding advice from any other source.
- The Resolution Committee's decision will be made by consensus.
- Once a decision is made, the Calgary IMS Board of Directors must be notified. As soon as possible, all parties will reconvene at which time the Committee will distribute copies of its written findings and read them aloud.

7. Sanctions

- Where possible, the Resolution Committee should aim to achieve resolve issues through solutions which promote clear understanding and peaceful relations between the parties involved, without the need to introduce formal sanctions.
- Based on the findings and recommendations of the Resolution Committee, there may be occasions in which sanctions are advised. Sanctions are intended to ensure Calgary IMS is able to continue to serve our members and the general public according to our mission and values.
- Sanctions are at the discretion of the Calgary IMS Board of Directors. These may include, but are not limited to:
 - Written notification that continuation of the problematic behaviour will result in particular consequences or further sanctions (a warning)
 - Restrictions to participating in or leading Calgary IMS activities
 - Removal from participation or leadership in Calgary IMS activities
 - Withdrawal of Calgary IMS membership
 - Removal from Calgary IMS Board of Directors

8. Additional Sanctionable Behaviour

Application of sanctions is at the discretion of the Calgary IMS Board of Directors. Besides considerations outlined in item #6 above, significant violations of the Teachers and Directors Code of Ethics or dereliction of Board duties by Calgary IMS Board members may result in the application of sanctions.

C. Requests to Review the Board's or Resolution Committee's Decision

The Board may, at its discretion, consider requests to review decisions made by the Board or Resolution Committee ***if pertinent and substantive new information, which would have materially affected the Board's or Committee's decision***, is brought forward by parties involved in the original complaint.

These policies and procedures are adapted from Spirit Rock Meditation Centre's grievance policy. Adapted December 2019.

