KEEPING AN INFORMAL RECORD

Keep a log or notebook (paper or electronically) if you are beginning to notice a negative pattern of events or interactions.

Maintain the record in a confidential place that is not accessible by others.

Log dates, times, problems/concerns, individuals involved, witnesses, your response, other people’s response including actions/reactions and outcome.

Share your record with someone you trust and/or a confidential office to obtain feedback and guidance.

Refer to your record if someone charges you with violating a code of conduct, a policy infraction or of being unprofessional.

Add to your record, as appropriate, by emailing an individual your understanding of an issue or a request, and any follow up plans. Be aware that email is discoverable so be cautious about what you put in writing and about the words you use.

Follow up with an email if you had an important conversation in person or on the phone that you may want to document or refer to at a later date.

Do not overuse email, because it will be clear to the other person that you’re creating a paper trail. This can erode or further erode any trust between parties.

Reach out to a confidential office to examine your options when you feel that you have sufficient evidence of a pattern of negative behavior or negative events.

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