



Member and Leader Code of Conduct Documentation Guide

The Member and Leader Code of Conduct (Code) process has been designed to serve as a tool for club and region leaders to navigate personality conflicts, governance grievances, and serious issues that may arise in Soroptimist activities.

Documentation is a crucial part of the Code process—thorough, non-biased documentation can help serve as a learning tool for members by creating plans to change behavior or learn from resources. It can also help show evidence of a pattern in the unfortunate event that behavior issues are persistent.

Tips for Documentation

- Be sure to keep documentation fact-based—even if feelings are running high, it is most helpful to state what occurred without judgment or emotion-driven words.
- Note relevant details—dates, times, who was involved, who witnessed it, and what occurred that may be a violation of the Code.
- Even if you did not witness the event yourself and are not sure, it can still be helpful to document what occurred and note the member that shared the information with you.
- Keep all documentation secure (in a locked filing cabinet or password protected file) to maintain member privacy.
- If incidents are persistent with the same member(s), be sure to continue documenting them as they occur as it will be necessary to submit a form for consideration by the Code of Conduct Review Committee.

Helpful Documentation Example

During tonight's meeting (February 5th, 2026) Sally Soroptimist interrupted Star Gazer's ideas for a new Dream It, Be It project several times. Sally said to Star "that's not going to work," "These ideas are a waste of time," and "we've tried that before and we don't do things like that anymore." This was witnessed by all the members in attendance at the meeting (see meeting notes attached for documentation). The repeated interruptions were disrupting Star Gazer's presentation, and she eventually left the meeting and said she's considering terminating her membership.

Why is this *helpful* documentation?

- It is a neutral statement of the event that occurred without emotion or judgement.
- It includes helpful details, like quotes of what was said, the date of the incident, the members involved, and the witnesses.
- It includes additional documentation like the meeting notes that state who was in attendance.

Unhelpful Documentation Example

Sally Soroptimist is ALWAYS interrupting Star Gazer and saying things like her ideas are bad, and we don't do things like that here. It's annoying and disruptive to the club business and we can't stand it! Eventually Star Gazer stormed out of the meeting and screamed she's considering terminating her membership.

Why is this *unhelpful* documentation?

- It lacks details—it doesn't note when the incident occurred or if it was repeated.
- It lacks details—it doesn't state what exactly was said or occurred or who witnessed it.
- It includes emotional words and judgment from the documenting member, instead of neutrally stating what happened.

You can use the template below to document incidents or for a member to submit an issue to a club leader.

Suggested Documentation Template Form

Name and title of member completing documentation:

Date of incident:

What occurred:

Who was involved:

Witness names:

Include/note any supporting documentation (screenshots, emails, text messages, etc):

After the incident

Detail any actions taken/resolutions reached:

Detail any training or education provided to the member(s):