

# Incident Report

Internal Evaluation

**Somebody has submitted an incident report.**

1. Check the details in the "Report" section below.
2. Follow the steps outlined in the "Evaluation & Follow Up" section by answering all the questions.
3. Sign the document in the "Evaluation completed by" section.

## Report Answers

### PERSONAL DETAILS

name

email

phone

### META

Who does the incident you are reporting concern?

Is the person submitting the report a volunteer or partner?

Asked for email summary

Yes/No

### ..IF THEY'RE A VOLUNTEER

Role

Start date

End date

### ..IF THEY'RE A PARTNER

What organisation are you representing?

What is your role within your organisation?

Is there anybody else within your organisation we should involve in following up on this report?

## PERMISSIONS

The person submitting this report has agreed that...

...they can be contacted for a follow-up

...their name can be shared with the organisation/volunteer  
involved in the incident

...details of their report can be shared with the  
organisation/volunteer it involves

## INCIDENT DETAILS

What kind of incident do you  
want to report?

What happened?

Are there other individuals,  
groups, or entities that were  
affected by the incident?

Are there any other witnesses  
you would like to name?

Is there anything else you  
would like to add?

Have you escalated this  
concern within the  
organisation?

# Internal Evaluation & Follow Up

1 What is [Charity Name]'s relationship to all parties?

Did the volunteer join us?

Is the organisation one of our partners?

What about any other party involved?

2 Who is the most appropriate member to carry out the investigation for this incident report?

In most cases concerning \_\_\_\_\_, the \_\_\_\_\_ will carry out the investigation.

3 Do you have enough information to properly assess the incident reported on here?

If your answer is 'Yes', proceed to question number

4 In case you do not have enough information

- Check whether the person submitting the report is okay with being contacted.
- If they are, follow up with them.
- Save a transcript of your conversation.

Please note that the person submitting the report answered the question of whether they want to be contacted with:

\_\_\_\_\_

5 Further investigation needed?

- If you need further information, or to talk to more parties involved, save a transcript of your communications.
- Ensure to re-check the Permissions the incident reporter has specified when sharing information about the case and identifiable information about individuals/organisations involved in the case. If you are unsure of the levels of confidentiality wanted by the incident reporter, contact them to clarify

6

How is [Charity Name] going to proceed in light of this report?

*[Guidance]*

7

If [Charity Name] has fed back to the affected organisation/volunteer(s), please save a transcript of that conversation and link to it below.

The transcript should also clearly outline any follow up actions that came up out of the conversation.

8

How do you think the conversation with the organisation/volunteer(s) went?

This is a question on your subjective judgement. Was the organisation cooperative? Did they brush the incident off as trivial?

9

Will [Charity Name] reconsider its partnership with the organisation/re-placing the volunteer(s) in question as a result of this incident and/or how it was handled?

10

Was there a follow up at a later date? What was its outcome?

Answering this question is optional.

Evaluation completed by

*name*

*position*

*date*