

Advisor Information and Consent Form

Consistent with the University of Puget Sound's

Investigation and Resolution of Complaints of

Sex or Gender-based Discrimination, Sexual Harassment, or Sexual Misconduct

The University of Puget Sound is providing this form to explain the role and scope of Advisors participating in its Procedure to Respond to Complaints of Sex Discrimination, Sexual Harassment, or Sexual Misconduct and to confirm consent to share information with a party's identified Advisor.

Advisors

The parties may each have an Advisor of their choice present with them for all meetings, interviews, and hearings within the resolution process, if they so choose. The parties may select whoever they wish to serve as their Advisor as long as the Advisor is eligible and available. Parties will be required to complete this consent form allowing information to be shared with their Advisor.

Parties are not required to have an Advisor during the initial stages of the resolution process, but must choose one or have one assigned to them prior to a hearing. A party may elect to change Advisors during the process and is not obligated to use the same Advisor throughout.

The parties are expected to inform the Investigator(s) of the identity of their Advisor at least **two (2) business days** before the date of their first meeting with Investigators (or as soon as possible if a more expeditious meeting is necessary or desired).

The parties are expected to provide timely notice to the Title IX Coordinator if they change Advisors at any time. It is assumed that if a party changes Advisors, consent to share information with the previous Advisor is terminated, and a consent form for the new Advisor must be secured. Parties are expected to inform the Title IX Coordinator of the identity of their hearing Advisor at least **five (5) business days** before the hearing.

The university generally expects an Advisor to adjust their schedule to allow them to attend university meetings when planned, but may change scheduled meetings to accommodate an Advisor's inability to attend, if doing so does not cause an unreasonable delay.

The university may also make reasonable provisions to allow an Advisor who cannot attend in person to attend a meeting by telephone, video conferencing, or other similar technologies as may be convenient and available.

Who Can Serve as an Advisor

An Advisor may be a friend, mentor, family member, attorney, university faculty or staff member or any other individual a party chooses to advise, support, and/or consult with them throughout the resolution process. The parties may choose Advisors from inside or outside of the university community. If a party chooses their own Advisor, that Advisor is expected to follow university policies and procedures. Should a case move to a formal hearing, the Title IX Coordinator will assign a trained Advisor for any party that does not choose their own.

The university cannot guarantee equal advisory representation. For example, if one party selects an Advisor who is an attorney, but the other party does not or cannot afford an attorney, the university is not obligated to provide an attorney.

Role of an Advisor

Advisors should help the parties prepare for each meeting and are expected to advise ethically, with integrity, and in good faith.

Advisors may request to meet with the Title IX Coordinator in advance of any meeting to clarify and understand their role and the university's policies and procedures.

Should a complaint proceed to a hearing, each party's Advisor is required to ask questions on behalf of their advisee. The parties are not permitted to directly question each other or any witnesses. If the party's Advisor will not conduct questioning, the university will appoint an Advisor who will do so thoroughly, regardless of the participation or non-participation of the advised party in the hearing itself. Extensive questioning of the parties and witnesses may also be conducted by the Hearing Officer(s) during the hearing.

All Advisors are subject to the same university policies and procedures, whether they are attorneys or not. Advisors are expected to advise their advisees without disrupting proceedings. Advisors should not address university officials in a meeting or interview unless invited to (e.g., asking procedural questions). The Advisor may not make a presentation or represent their advisee during any meeting or proceeding and may not speak on behalf of the advisee to the Investigator(s) or Hearing Officer(s) except as required during the hearing.

Although the Advisor generally may not speak on behalf of their advisee, the Advisor may consult with their advisee, either privately as needed, or by conferring or passing notes during any resolution process meeting or interview. For longer or more involved discussions, the parties and their Advisors should ask for breaks to allow for private consultation.

Violations of University Policy by Advisor

Any Advisor who oversteps their role as defined by this policy will be warned. If the Advisor continues to willfully disrupt or otherwise fails to respect the limits of the Advisor role, the meeting may be ended and the university may require the party to use a different Advisor. If the behavior occurs during a hearing, the university will provide that party with a different Advisor to conduct cross-examination on behalf of that party.

Subsequently, the Title IX Coordinator will determine how to address the Advisor's non-compliance and future role.

Sharing Information with the Advisor

Information in the resolution process is considered confidential. The university expects that the parties may wish to have the university share documentation and evidence related to the allegations with their Advisors. Parties may share this information directly with their Advisor or other individuals if they wish. Doing so may help the parties participate more meaningfully in the resolution process.

All communication will be between the appropriate university administrator and the parties. Parties may request their Advisor to be copied on correspondence, however, it will be the party's responsibility to communicate with UPS staff directly.

Advisors are expected to maintain the privacy and confidentiality of the records shared with them. These records may not be shared with third parties, disclosed publicly, or used for purposes not explicitly authorized by the university. The university may seek to restrict the role of any Advisor who does not respect the sensitive and confidential nature of the process or who fails to abide by the university's privacy expectations.

I understand that:

- It is my responsibility to share information regarding university policies and procedures with my Advisor;
- If my Advisor does not adhere to their defined role, they may be removed from any meetings or hearings;
- I may revoke this consent, in writing, at any time except to the extent that action has already been taken upon this release; and
- I will not be contacted after an inquiry is made or information is released to the individual listed under the Advisor Information section of this form.

Scope of Release

This release of information permits the university to communicate with the designated Advisor below regarding the investigation and resolution of reported sex discrimination, sexual harassment, or sexual misconduct, including relevant prior conduct/discipline history, involving the party identified on this form

Advisor's Name

Firm/Organization/Agency Firm Name (if applicable)

Phone:

Email:

I do not have an advisor and understand the university will assign me an Advisor should this proceed to a hearing under the university's procedure.

By signing below, I am voluntarily giving my consent to the University of Puget Sound to disclose information to the individual listed in the Advisor Information section of this form until the completion of the resolution process unless cancelled at any time via a written notification to the Title IX Coordinator.

Party's Printed Name

Party's Signature

Date