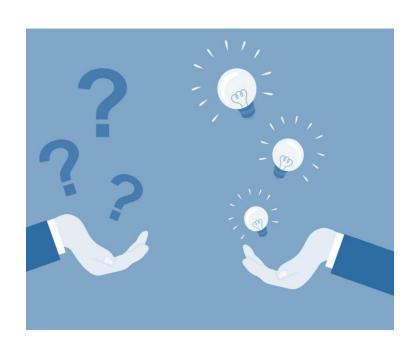
Using Al in EEO/Title IX Investigations

A Practical & Ethical Guide

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How are we using the term -- Al?



- Al-powered language models (e.g., ChatGPT, Co-Pilot, Gemini)
- Generate, summarize, and rephrase text based on prompts
- Not a decision-maker or fact-finder
- Must be guided by a trained human professional

Objectives



Understand how AI can support the EEO/Title IX investigation processes



Learn how to use it responsibly during interviews and report drafting



Identify limitations, ethical boundaries, and best practices







TITLE IX: ENSURE
IMPARTIALITY AND DUE
PROCESS





WORK WITH IT FOR PRE-APPROVAL AND SECURE CONFIGURATIONS



USE CUSTOM GPTS OR SECURE PLATFORMS WHEN POSSIBLE

Responsible Use Principles



Confidentiality First:

No real names or sensitive facts unless on secure (verified by campus IT) platforms



Human Oversight Always:

Al assists, but investigators finalize content (<u>you</u> must approve & finalize and stand by it)

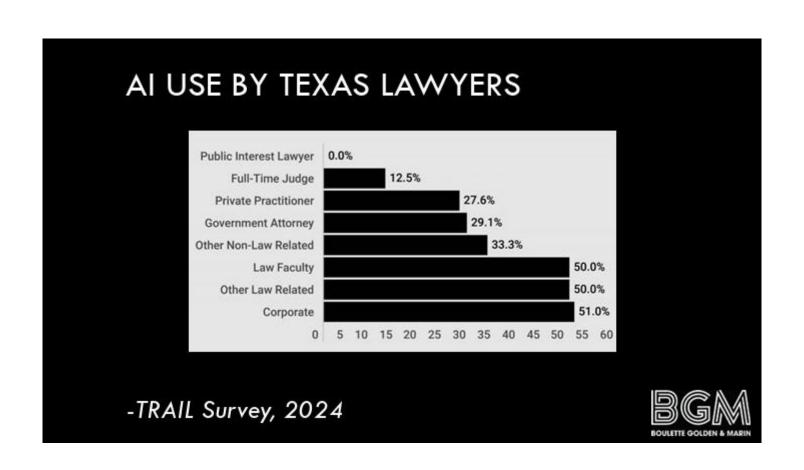
Learnings from the UT Law CLE - Labor and Employment Conference: July 2025

Al will not replace humans, but those who use Al will replace those who don't.

-Ginni Rometty, Former CEO of IBM



Learnings from the UT Law CLE - Labor and Employment Conference: July 2025



Learnings from the UT Law CLE - Labor and Employment Conference: July 2025

AI USE BY TASK

	Category Responses	Category Percent
Legal research	103	53.4%
Drafting (pleadings	70	36.3%
Communication (correspondence	64	33.2%
Other	45	23.3%
Marketing/advertising	33	17.1%
Document Management	29	15.0%
Discovery	28	14.5%
Communication	17	8.8%
Scheduling	14	7.3%
Client intake/screening	12	6.2%

-TRAIL Survey, 2024





Al Tips for Investigators

- Use AI as a tool (similar to how you use Microsoft Word, Teams, Canva, Maxient, etc).
- Al is not a substitute for you, and can never be the primary author

What AI Should Not Do



- Make credibility determinations
- Make findings of fact
- Replace investigator analysis
- Interpret legal standards or policy violations
- Store or recall private institutional data
- Serve as sole source for conclusions

Al Use Cases in EO/Title IX Work

Before Interview

Draft trauma-informed questions, brainstorm sensitive language, create preliminary templates for semi-structured interview guides

After Interview

Summarize notes, organize chronologically, extract key points or potential inconsistencies

Report Writing

Draft policy-aligned findings, reword for clarity, maintain neutrality

Example Prompt Use

Draft/Rewrite Outline Create Organize Create neutral, Outline key Phrase questions Rewrite Organize events trauma-informed questions based to clarify consent summaries in into timelines on specific without implying and extract key questions for neutral, interviews allegations blame objective tone points

PREP WITH CHARLIE



Investigator



Charlie

"Help me create neutral, trauma-informed questions for a Title IX interview with a reporting party alleging harassment in an academic lab setting."

1. Context & Setting

- Can you tell me about your role or involvement in the lab environment?
- O What is the general culture like in the lab?
- O How long have you worked or studied in this lab?

2. Experience of Harm

- Are you able to share what prompted you to come forward?
- o Can you describe any interactions or behaviors that made you feel uncomfortable or concerned?
- O When did you first notice something didn't feel right?

3. Nature of the Conduct

- O What happened, to the extent you feel comfortable sharing?
- O Where did this occur, and were others present?
- Were there specific words, gestures, or actions that stood out to you?
- O Did the behavior happen more than once, or was it a single occurrence?

4. Impact

- O How has this affected you personally or professionally?
- Have you made any changes in your work, schedule, or involvement in the lab because of this?
- O What supports, if any, have you accessed?

5. Response & Reporting

- Did you share your concerns with anyone before this meeting? If so, who?
- O Was there a particular reason you chose to report when you did?
- o How do you hope this situation will be addressed or resolved?

6. Closing / Additional Information

- o Is there anything else you'd like me to know that we haven't talked about?
- o Is there anyone else you believe may have witnessed or experienced similar behavior?
- What would help you feel safe or supported moving forward?

PREP WITH CHARLIE



"How can I phrase a question to clarify whether consent was present, without implying blame? The Complainant was drunk, and I need to ask how many drinks she had and when."

Investigator



Charlie

Trauma-Informed, Neutral Questions About Alcohol and Consent



General Framing (Before asking):

"I'm going to ask a few questions about the events of that night, including about any alcohol use. These questions are standard, and the goal is simply to understand the full context of what happened—not to judge or assign fault."



Alcohol Use (Timeline + Quantity):

- o "Do you recall drinking anything that night? If so, what kinds of drinks did you have?"
- "Can you walk me through what you had to drink, from the beginning of the evening to the time of the incident, as best you remember?"
- o "Do you remember approximately how many drinks you had, or over what period of time?"
- o "Were you drinking with others, or alone? Were people offering you drinks?"
- "At any point, did you start to feel differently—lightheaded, disoriented, sleepy, or unsteady?"



Capacity / Consent (Avoiding Blame):

- o "Do you recall how you were feeling—physically or mentally—around the time of the incident?"
- "Were you able to speak clearly, walk steadily, or make decisions?"
- o "Do you remember whether you were able to say yes or no to what was happening?"
- o "Do you recall whether you felt in control of the situation?"
- o "At any point, did you feel like you couldn't give or withdraw consent?"



Tips for Delivery:

- o Use "do you recall" instead of "did you" which allows for memory gaps without shame.
- o Use "help me understand" or "walk me through" to show care rather than interrogation.
- o Avoid implying **any responsibility** for being intoxicated.

PREP WITH CHARLIE



"Complainant alleged that Respondent told him, "I need my protein if you know what I mean," and later asked him to be friends with benefits. What questions should I ask the Complainant during a sexual misconduct investigation?"

Investigator



Charlie

1. Clarification of Events:

- Can you describe the context in which the statement, "I need my protein, if you know what I mean was made?"
- What were the circumstances surrounding the request to be friends with benefits? Where and when did it occur?

2. Impact:

- O How did the comments and the request make you feel at the time?
- o Did you feel threatened, uncomfortable, or coerced by these interactions?

3. Details of the Interaction:

- O Were there any witnesses present when these comments were made?
- Were there any previous interactions with the Respondent that might have led to this conversation?

4. Patterns of Behavior:

- Have there been other instances where the Respondent made similar comments or behaved inappropriately toward you or others?
- o How often have you interacted with the Respondent before this incident?

5. Response:

How did you respond to the Respondent's comments and request? If so, how did they react?

DRAFT WITH CHARLIE

Case Type: Equal Opportunity



Investigator

Complainant alleges her supervisor engaged in racial discrimination by allowing Hispanics to work remotely but not Blacks. Respondent stated that only two employees, both Hispanic, have been permitted to work from home. One works remotely for overtime, and the other pursuant to an ADA request.

Write a paragraph explaining why the Respondent did not violate institutional policy on equal opportunity by denying the Complainant's request to work remotely.



Charlie

The respondent did not violate the institutions policy on equal opportunity by denying the complainant's request work remotely based on the specific circumstances surrounding the remote arrangements of the Hispanic employees. One individual's ability to work remotely for overtime was in accordance with established operational needs, and her situation did not set a precedent for general remote work eligibility. Additionally, the other Hispanic employee's remote work was granted as a reasonable accommodation under the Americans with Disabilities Act (ADA), which allows for adjustments based on documented medical needs. These factors indicate that the decisions regarding remote work were based on legitimate business practices and individual circumstances rather than any discriminatory intent, thereby maintaining compliance with equal opportunity policies.

COMPARE WITH CHARLIE

Equal Opportunity (Continued)



Charlie

The respondent did not violate the institutions policy on equal opportunity by denying the complainant's request work remotely based on the specific circumstances surrounding the arrangements of the Hispanic remote employees. One individual's ability to work remotely for overtime was in accordance with established operational needs, and her situation did not set a precedent for general remote work eligibility. Additionally, the other Hispanic employee's remote work was granted as a reasonable accommodation under the Americans with Disabilities Act (ADA), which allows for adjustments based on documented medical needs. These factors indicate that the decisions regarding remote work were based on legitimate business practices and individual circumstances rather than any discriminatory intent, thereby maintaining compliance with equal opportunity policies.

Investigator

Here, it is undisputed that Respondent denied Complainant's request to work remotely but that Comparator A and Comparator B, who are both Hispanic, were permitted to do so. The evidence, however, shows that Comparator A was permitted to remotelv due ADA work to an accommodation granted by OATIX. Further, Comparator B was only permitted to work overtime remotely but, like her peers, was required to complete her shift in the clinic. Complainant states that the majority of her absences were due to her doctor's instructions not to return to work or her children being sick. On September 10, 2024, Complainant was referred to UTSW's EMP-162 Flexible Working Arrangement policy by Driver, who specifically explained to Complainant that the policy is not a substitute for dependent childcare.



LEARN FROM CHARLIE

Here's a comparison between your paragraph and the one I provided:

1. **Content Focus**:

- Your paragraph likely addresses the specific reasons related to the Hispanic employees' remote work arrangements (such as overtime and ADA accommodations) as justifications for the respondent's decisions.
- My paragraph also emphasizes these reasons but frames them within the context of institutional policy and equal opportunity, highlighting that these are legitimate business practices.

2. **Clarity and Structure**:

- Your paragraph might succinctly state the facts but could benefit from explaining how these individual situations do not reflect a pattern of discrimination against the complainant.
- My paragraph elaborates on the implications of the decisions, ensuring clarity on why they do not stem from discriminatory practices, and emphasizes compliance with equal opportunity policies.

3. **Tone**:

- Both paragraphs aim for a neutral tone, but mine explicitly articulates the legality and adherence to policies, which could strengthen the argument when addressing allegations of discrimination.

Overall, the main difference lies in the depth of explanation regarding how the individual circumstances of the employees justify the respondent's actions in relation to institutional policies on equal opportunity. If you'd like to refine your paragraph further or want specific feedback on any part, feel free to share!

Mitigating Risks

- Verify AI-generated paraphrasing of testimony
- Maintain control of narrative tone
- Ensure AI does not "fill-in" gaps not in the original evidence
- Never share names, emails, phone numbers, or casespecific identifying details.
- Avoid uploading documents that contain sensitive HR, medical, or investigatory information
- All official records, notes, and reports should be stored within your institution's secure systems (e.g., case management software)

Case Type: Title IX



Investigator

Here is the Title IX institutional policy for UT Southwestern - https://secure.compliance360.com/ext/Ordjy5vSoQc=

Fact Pattern: A college student, Jane Doe, reports to the Title IX Coordinator that a fellow student, John Roe, has been repeatedly making unwanted sexual advances towards her in their shared academic building. Jane states that John would stand outside her classes and try to intercept her, compliment her appearance, and invite her to dates and other activities she had no interest in. Despite Jane politely declining, the behavior continued (a total of 2 times), making her feel uncomfortable and affecting her ability to focus in class. Jane reports that this behavior caused Jane to feel unsafe walking to and from classes, and eventually caused her to drop a course to avoid contact with John. John admitted to the conduct but states that he was, "in love for the first time and didn't know how else to talk to her." **Draft a preliminary investigation report based on university policy and the facts presented.**

Case Type: Title IX



Charlie

PRELIMINARY INVESTIGATION REPORT

Prepared by: Title IX Office

Date: [Insert Date]

Investigator: [Insert Investigator Name]

Complainant: Jane Doe (Student) **Respondent:** John Roe (Student) **Case Number:** [Insert Case Number]

I. Allegation Summary

On [Insert Report Date], Jane Doe submitted a report to the Title IX Coordinator alleging that John Roe engaged in repeated and unwanted sexual advances toward her in and around their shared academic building. Jane reported that on two separate occasions, John waited outside of her classroom to intercept her, complimented her appearance, and asked her to go on dates and participate in social activities. Despite Jane clearly and politely declining John's advances after the first incident, he repeated the behavior a second time. Jane reported that these interactions made her feel increasingly uncomfortable, unsafe on campus, and unable to focus in class. As a result, she ultimately dropped a course to avoid continued contact with John. During the preliminary inquiry, John admitted to approaching Jane twice in the described manner. He stated he did so because he was "in love for the first time and didn't know how else to talk to her." John confirmed he continued the behavior after Jane declined the initial advance.

II. Policy Framework

This investigation is governed by UT Southwestern Policy **ETH-154**: **Sexual Harassment and Sexual Misconduct**, which prohibits conduct on the basis of sex that denies or limits a person's ability to participate in or benefit from the institution's educational programs or activities.

Case Type: Title IX



Charlie

II. Policy Framework

This investigation is governed by UT Southwestern Policy **ETH-154**: **Sexual Harassment and Sexual Misconduct**, which prohibits conduct on the basis of sex that denies or limits a person's ability to participate in or benefit from the institution's educational programs or activities.

Per ETH-154, sexual harassment is defined as:

"Unwelcome conduct determined by a reasonable person to be so severe, pervasive, and objectively offensive that it effectively denies a person equal access to the University's education program or activity."

Additionally, UT Southwestern has the discretion to address conduct that does **not meet the narrow definition of Title IX harassment** but still constitutes a violation of its broader **institutional policy on sexual misconduct or sex-based discrimination**.

III. Jurisdiction and Scope

- Parties: Both complainant and respondent are enrolled students.
- Location: Alleged conduct occurred in a shared academic building on university grounds.
- **Impact:** Jane reports emotional and academic consequences, including course withdrawal and fear navigating campus.
- Admission: Respondent acknowledges the conduct occurred.

This conduct falls within the scope of UT Southwestern's jurisdiction and institutional authority to investigate under ETH-154 and associated student conduct codes.

Case Type: Title IX



Charlie

IV. Evidence Summary

- **Complainant's Statement:** Jane recalled two separate instances of being approached by John, with each involving compliments on her appearance and invitations to spend time together. She indicated she declined his first advance clearly and expected it to stop. After it continued, she became anxious and avoided her academic route, culminating in her dropping the course.
- Respondent's Statement: John Roe did not dispute Jane's account. He confirmed both incidents and
 expressed emotional motivation but acknowledged knowing Jane was not interested after the first
 interaction.
- Academic Impact Evidence (if available): Class withdrawal documentation; possible witness statements (pending).

V. Preliminary Analysis

A. Title IX Threshold (ETH-154)

To constitute sexual harassment under ETH-154, conduct must be:

- Unwelcome
- Sex-based
- So severe, pervasive, and objectively offensive that it denies access to education

While the conduct was clearly **unwelcome** and **sex-based**, it occurred **two times**, which may **not rise to the level of "pervasive" or "severe" enough** to qualify as Title IX sexual harassment under the strict federal regulatory definition (2020 Title IX Regulations, 34 C.F.R. § 106.30).

B. Institutional Sexual Misconduct (ETH-154, Section VI)

Case Type: Title IX



Charlie

B. Institutional Sexual Misconduct (ETH-154, Section VI)

However, ETH-154 also allows for institutional action against conduct that:

"May not meet the definition of sexual harassment under Title IX but is nonetheless inappropriate, unwelcome, and affects an individual's educational experience."

In this case:

- Jane was forced to withdraw from a course
- She reported emotional discomfort and safety concerns
- The behavior was repeated after she asked for it to stop
- John acknowledged he continued despite Jane's disinterest

These facts satisfy the criteria for institutional sexual misconduct, even if not Title IX harassment.

VI. Findings and Next Steps

Preliminary Finding:

This case **does not meet the Title IX definition** of sexual harassment under federal regulations due to **limited number of incidents (two)** and lack of physically threatening behavior, but it **does meet the threshold for a potential violation of UT Southwestern's institutional policy on sexual misconduct.**Recommended Action:

Submitted by:

[Investigator Name]
Title IX Office
UT Southwestern Medical Center
[Date]

Key Takeaways



- Responsible use builds trust
- Al can increase efficiency—but must be supervised
- Human investigators are responsible for content integrity
- Use AI for drafting, summarizing, organizing—not evaluating



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UPLOAD

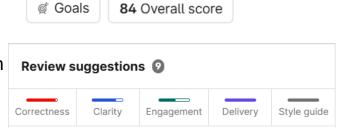
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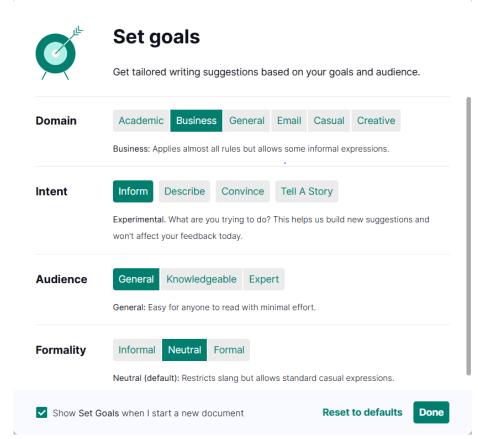


Or Type or paste (Ctrl+V) your text here or upload a document.

REVIEW

- Grammar
- Spelling
- Punctuation
- Clarity
- Tone





Grammarly: Style Guide

- Style Rules
- Organization Dictionary
- Team Preferences
- Brand Tones (On-Brand compassionate, formal, understanding) and (Off-Brand – "rude" or "too casual" language.



CHARLIE

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OATIX's Team's Writing Preferences

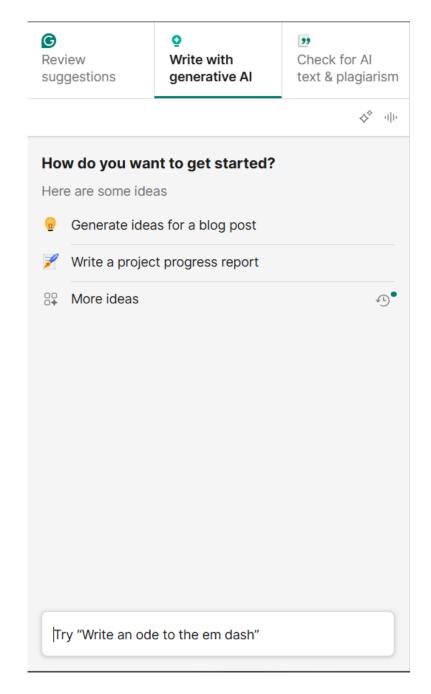
Customize writing preferences for your team to ensure they write co Reload any tabs or apps where you're using Grammarly for your setti

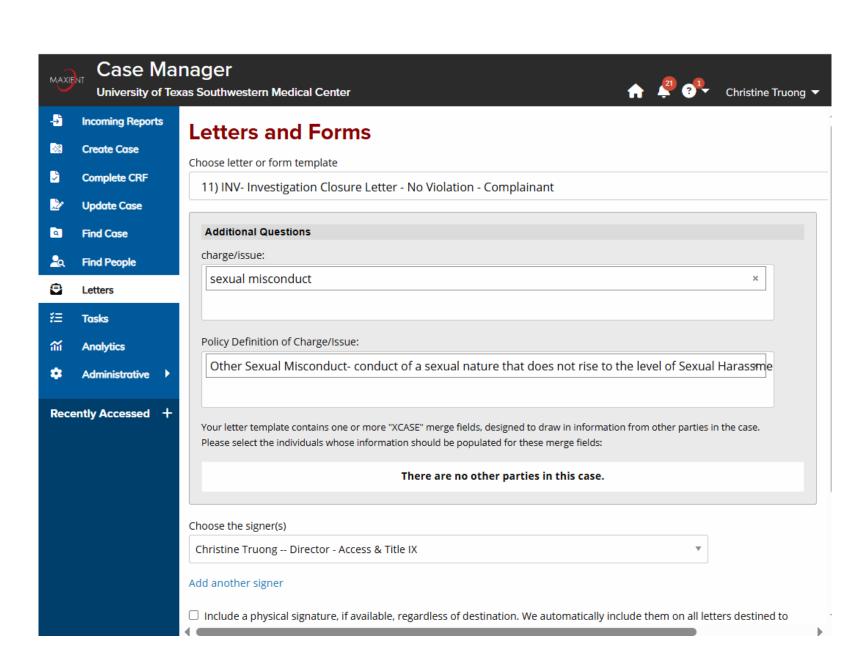
Q Search by preference Team setting Preference Ex No preference Detect AI text Er Rewrite text for better overall quality On for all Adhere to APA, MLA, or Chicago On for all C citation styles Rewrite sentences for clarity On for all Sι Sound more confident On for all Sι Avoid starting sentences with FI On for all conjunctions in academic writing E Use a consistent style of Ιd On for all abbreviation Use consistent capitalization On for all Sι

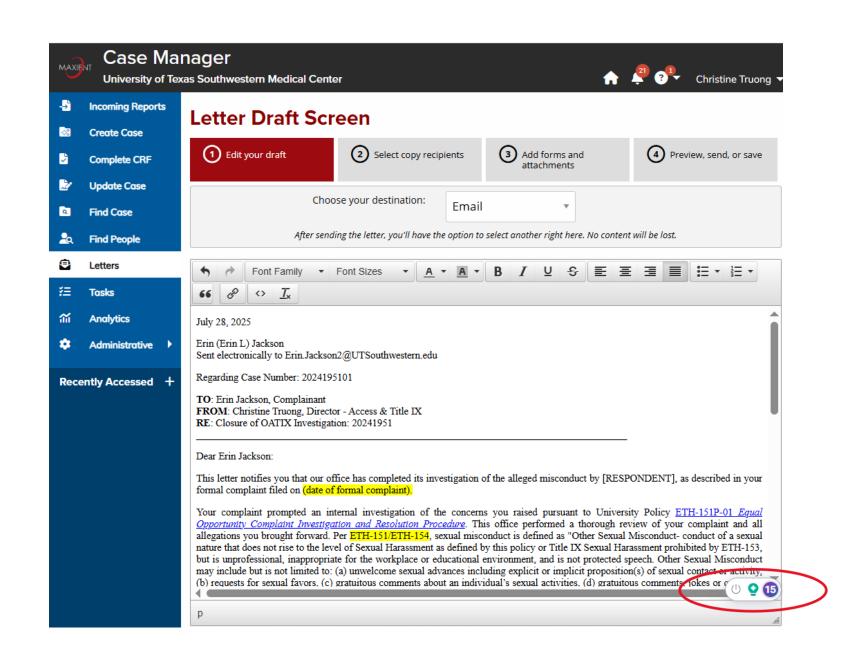
WRITE WITH GENERATIVE AI

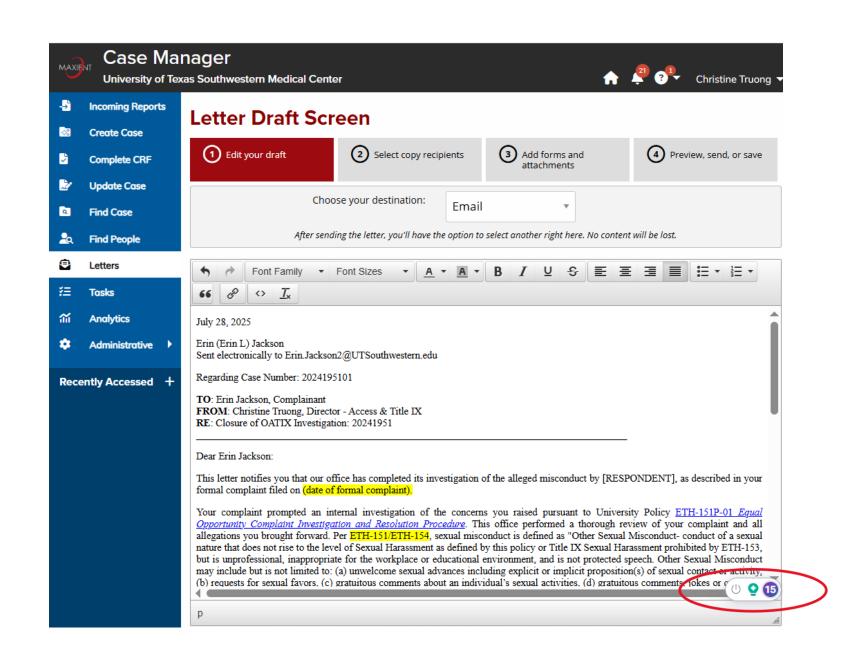
- Brainstorm
- Generate Questions
- Develop Research Plan
- Enhance Writing



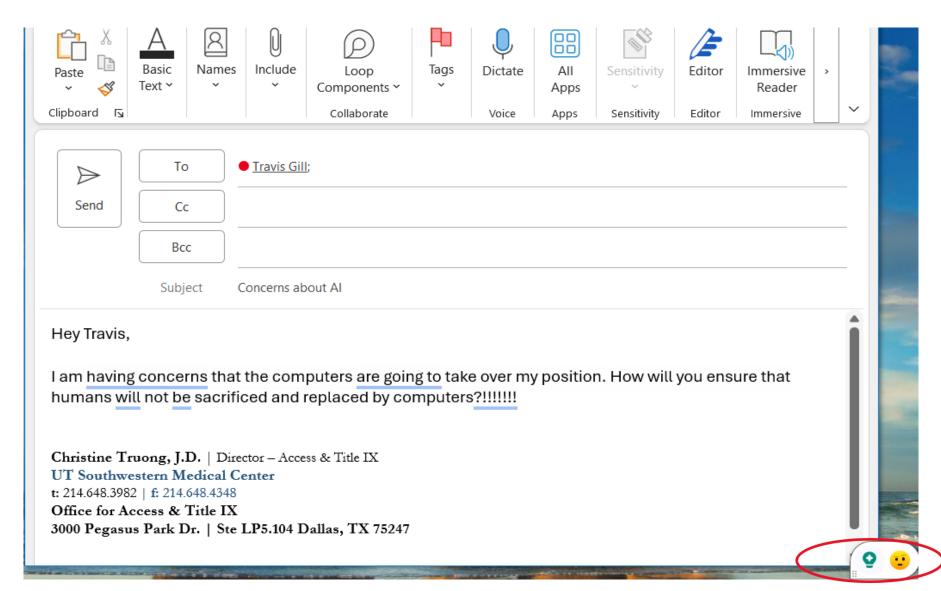


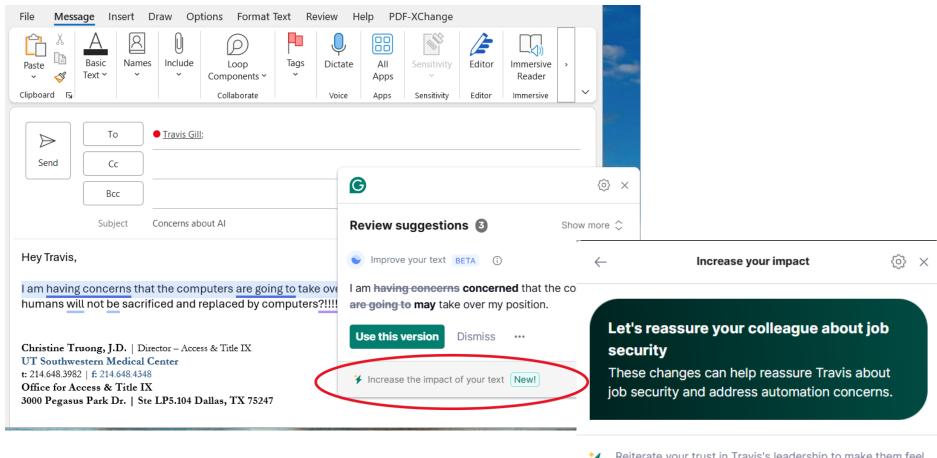






Using Grammarly for Email





Reiterate your trust in Travis's leadership to make them feel empowered and trusted

Travis, I've been considering the increasing role of automation in our work. I trust your leadership in ensuring that our human skills and contributions are not overlooked or replaced by machines.

Accept Dismiss ...

