



**OREGON**  
**FOOD BANK**



# CREATING A JUST EXPERIENCE OF PHILANTHROPY FOR OREGON FOOD BANK STAFF: *POLICIES & PRACTICES*

*Approved 3.1.2022 via fist-to-five consensus-based decision-making by the Community Philanthropy Team.  
Approved 3.21.2022 by EPCA for implementation.*

**Next Actions:** Implementation can precede the next phase of developing Policies & Practices, including:

1. Developing the Reporting Template (with EPCA & IT) *In process*
2. Developing the Safety Planning Template: *In process*
3. Increasing accessibility w/ trauma-informed and multi-modal learning lens. *In process*
4. Building accountability w/ transformative justice lens when donors cause harm. *In process*
5. Systematizing learning/engagement to increase awareness and familiarity of this document. *In process*

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## PREFACE

This document intends to inform Oregon Food Bank staff of resources, policies, and practices that strengthen a more just experience of philanthropy for OFB's Community Philanthropy team as we prioritize the integrity and well-being of our beloved community above financial resources.

# ACCOUNTABILITY

Loving accountability is essential for achieving and fostering the beloved community. Our collective is accountable to ourselves and to one another in shared responsibility to realize the promise of a more just experience of philanthropy.

**While that is true...**

**Oregon Food Bank's Leadership Team** commits to upholding the OFB Community Philanthropy Staff Bill of Rights and honoring the policies and practices herein that transcribe the Bill of Rights into lived experience.

**Community Philanthropy Leadership Team is responsible for:**

- Upholding the OFB Community Philanthropy Staff Bill of Rights and honoring the policies and practices herein that transcribe the Bill of Rights into lived experience.
- Making this document accessible to all Community Philanthropy staff.
- Facilitating input from our collective to update, expand, and improve the contents of this document on an annual basis.
- Supporting staff to activate and implement the policies and practices in this document.

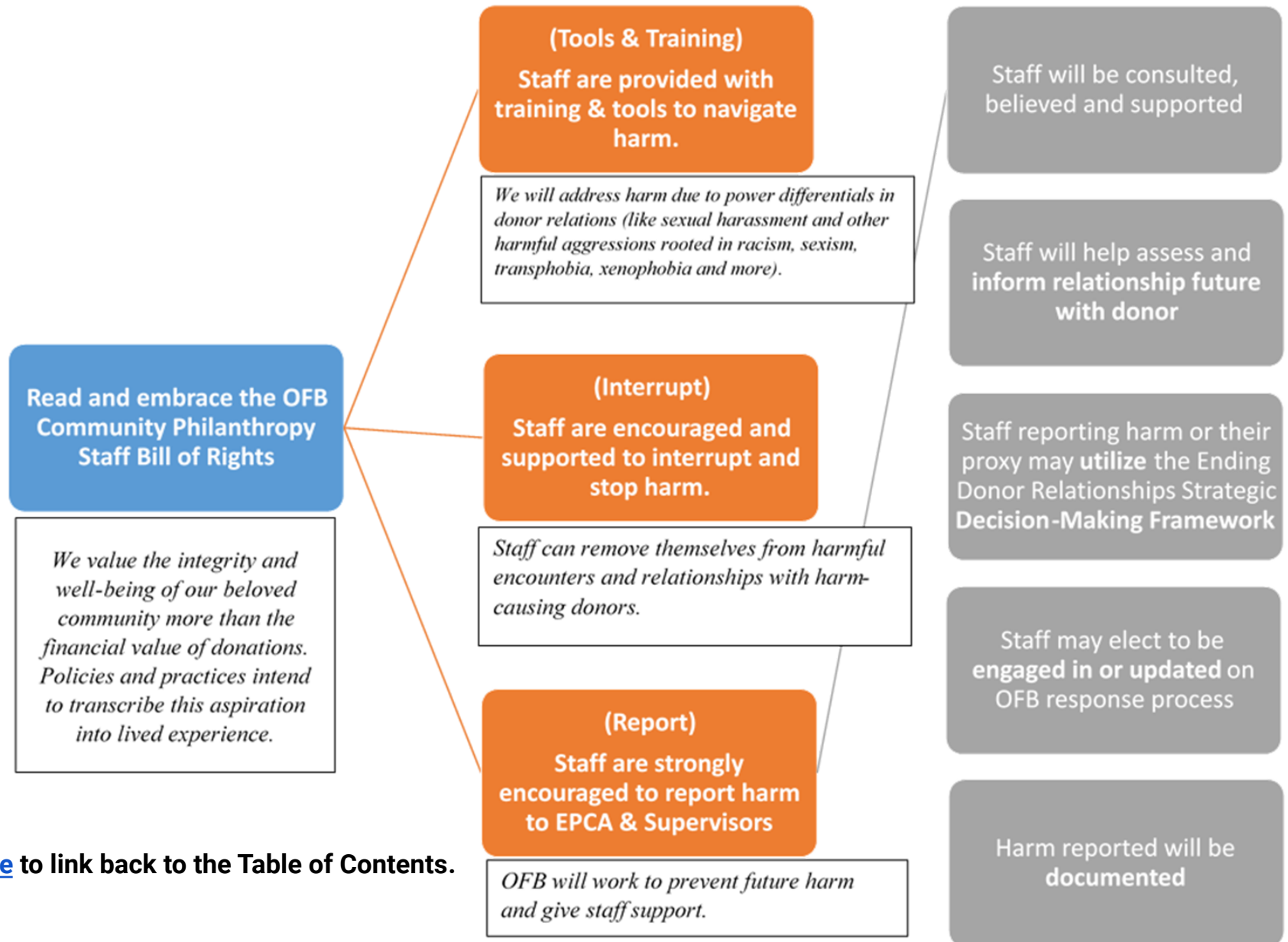
**All Community Philanthropy staff are responsible for:**

- Engaging with the content of this document to strengthen individual and collective understanding.
- Providing input to update, expand, and improve the contents of this document on an annual basis.
- Utilizing the tools, resources, and trainings provided and described within this document.
- Activating and implementing the policies and practices in this document.

**When we become aware of shortcomings from these guiding and aspirational commitments, any member of our collective has the right and responsibility to lift incidents to managers, directors, or EPCA; and, it is the responsibility of leaders to assess reports and identify actions to repair, learn, address, and prevent similar, future shortcomings.**

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## A SIMPLE OVERVIEW OF PROCESSES



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# OFB COMMUNITY PHILANTHROPY: STAFF BILL OF RIGHTS



## OFB COMMUNITY PHILANTHROPY STAFF BILL OF RIGHTS

**We believe that philanthropy can be more just. Philanthropy rooted in love and equity can affect transformational change that ends hunger and hunger's root causes.**

This requires us to dismantle white supremacy, decolonize our profession, and eschew the harms of exploitative and extractive capitalism - including harms that threaten the integrity and well-being of we the staff. In doing so, we can advance a [Just Transition](#) for the institution of philanthropy itself.

With love and equity centered, we can create a profession and team more inclusive and representative (including of BIPOC, transgender and gender nonconforming, and immigrant and refugee communities as well as single parents and caregivers). We can

build a profession and team wherein an individual can better expect care, respect, dignity, and opportunity. Therefore, **Oregon Food Bank commits** to upholding and protecting the following Bill of Rights among our Community Philanthropy staff as we fulfill our essential duties and responsibilities at or outside of OFB.

**While advancing and growing with robust opportunities for job security and collegial respect, as Community Philanthropy team members we have a right to...**

1. Work safely, authentically, and free from discrimination and harm while bringing our holistic, intersectional identities to fulfilling Oregon Food Bank's mission and vision.
2. Make decisions with autonomy and organizational support to preserve our integrity and well-being.
3. Interrupt, address, and excuse ourselves from situations and relationships that compromise our individual integrity and well-being and/or that of our colleagues.
4. Advocate for, access, and utilize tools and resources needed to effectively perform in our roles, and needed to navigate situations and relationships that compromise our integrity and well-being, and/or that of our colleagues.
5. Seek organizational and supervisory support to effectively perform in our roles, and to navigate situations and relationships that compromise our individual integrity and well-being, and/or that of our colleagues.
6. Share and document our stories and experiences of harm, as well as alert organizational leadership and supervisors to experiences of harm and situations that compromise our individual integrity and well-being - all without risk of retaliation.
7. Be believed when sharing and documenting our stories and experiences of harm, as well as alerting organizational leadership and supervisors to an experience of harm or situation that compromises our individual integrity and well-being.
8. Understand how our sharing and documenting of stories and experiences of harm shape organizational actions to ameliorate harm and mitigate future likelihood of compromise to staff members' integrity and well-being.
9. Engage the community in difficult conversations that strengthen awareness of the root causes of hunger.
10. Design and implement tactics and activities within Oregon Food Bank's theory of change and strategic plan, to end hunger today, end hunger's root causes, and end hunger for good.
11. Advise and guide organizational policies and practices that result in Oregon Food Bank honoring the commitments made in this Bill of Rights.

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# A GUIDE FOR ADDRESSING HARMFUL ENGAGEMENT IN DONOR RELATIONS

## OFB COMMUNITY PHILANTHROPY'S INTENT & COMMITMENT

Oregon Food Bank commits to upholding and protecting the [Community Philanthropy Staff Bill of Rights](#) as our team members fulfill their essential duties and responsibilities at or outside of OFB. While the Community Philanthropy Staff Bill of Rights is an expectation-setting declaration of intent among internal and external constituencies, the following standard operating procedures are the policies and practices that transcribe intent into lived experience for our team.

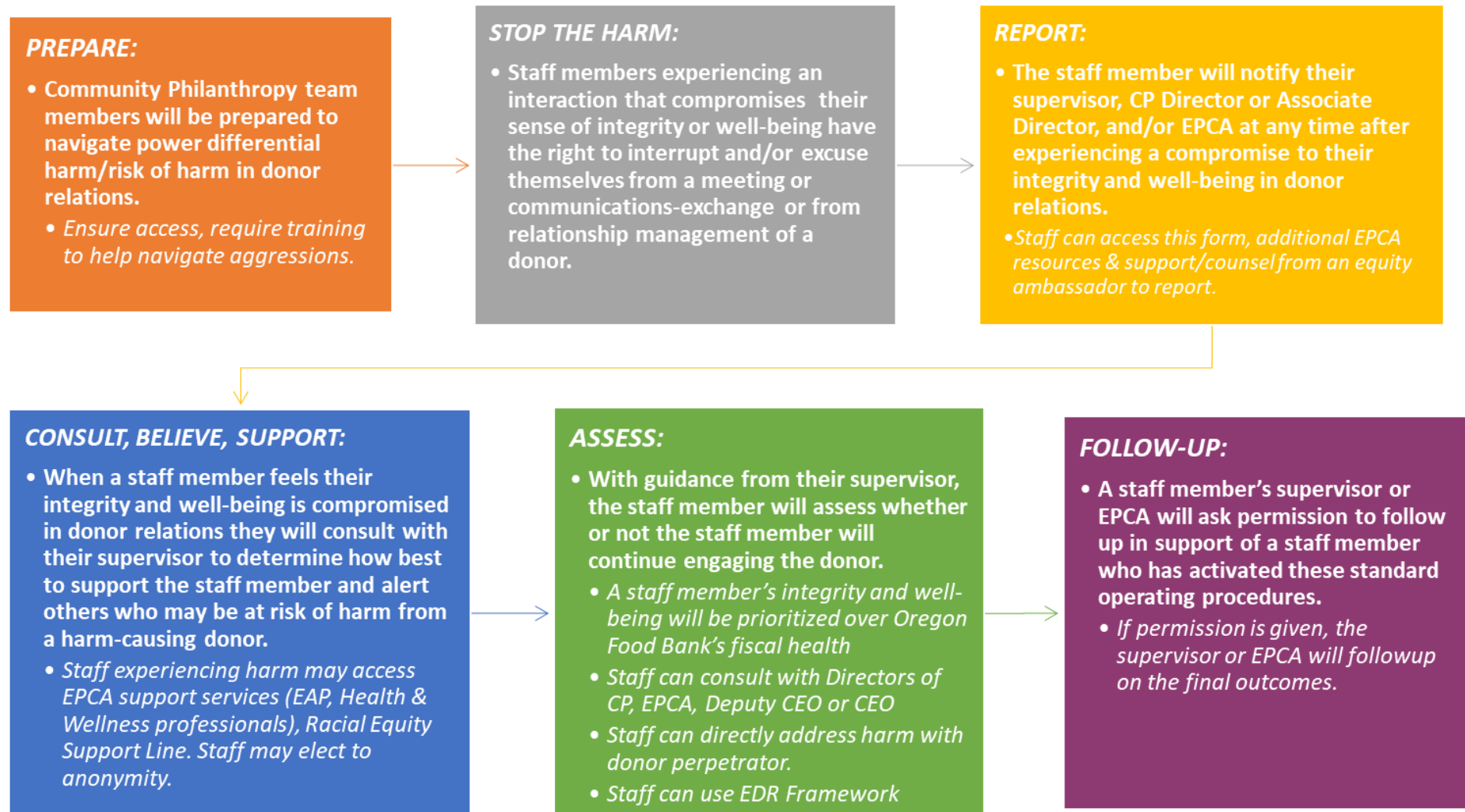
## ABOUT THESE & OTHER OFB RESOURCES

**These standard operating procedures can guide OFB Community Philanthropy's preparation for and response to harmful interactions that occur in donor relations, including but not limited to:**

- Written communications with harmful/malicious language or inappropriate content
- Phone communication with harmful/malicious language or inappropriate content
- Email or other digital exchange with harmful/malicious language or inappropriate content
- In person harmful/malicious language or inappropriate touching or content

In addition to [All Voices](#) and other [processes and resources staff can access through EPCA](#) to activate organizational supports, **Community Philanthropy team members are strongly encouraged to engage management within the Community Philanthropy Department to activate the following standard operating procedures when harm has occurred.**

## HARMFUL ENGAGEMENT STANDARD OPERATING PROCEDURES (VISUAL)





## HARMFUL ENGAGEMENT STANDARD OPERATING PROCEDURES

1. **PREPARE: Community Philanthropy team members will be prepared to navigate power differential harm/risk of harm in donor relations.**
  - a. This document will be made available to all Community Philanthropy team members as part of their onboarding and on an ongoing, annual basis to ensure all team members understand Oregon Food Bank's commitment to preserving the integrity and well-being of our staff.
  - b. All team members are required to attend at least one training to help navigate sexual harassment, power differential harms, gender/racial aggressions, etc. on an ongoing annual basis - provided through EPCA.
    - i. Community Philanthropy Managers will support/ensure compliance with training requirements.
    - ii. Performance evaluation will include consideration of staff members' attendance at such trainings.
  - c. Community Philanthropy will provide a "safety planning" template to prepare staff (as needed and requested) for donor visits that may present a risk of compromise to an individual staff member's integrity and well-being.
2. **STOP THE HARM: Staff members experiencing an interaction that compromises their sense of integrity or well-being have the right to interrupt and/or excuse themselves from a meeting or communications-exchange or from relationship management of a donor.**
3. **REPORT: The staff member will notify their supervisor, Community Philanthropy Director or Associate Director, and/or [EPCA](#) at any time after experiencing a compromise to their integrity and well-being in donor relations.**
  - a. If for whatever reason the staff member is not comfortable or unable to communicate with their supervisor, [they can access resources below](#).
  - b. Community Philanthropy staff can utilize this form to share details of their experience which will be remitted to EPCA and Community Philanthropy personnel for action within the scope of these standard operating procedures. **Form to be developed.**
  - c. Staff can seek support/counsel from an [Equity Ambassador](#), other colleague, or support-system outside of Oregon Food Bank in lieu of speaking with their supervisor or EPCA - however, that may not activate these standard operating procedures and relevant supports that could mitigate risk of future experiences of harm.



**4. CONSULT, BELIEVE, SUPPORT: When a staff member feels their integrity and well-being is compromised in donor relations they will consult with their supervisor to determine how best to support the staff member and alert others who may be at risk of harm from a harm-causing donor.**

- a. Their supervisor will guide the staff member through these SOPs to clarify expectations for process.
- b. Their supervisor will believe them and explore options for supporting the staff member.
  - i. A staff member experiencing harm may take time off to recover and repair.
  - ii. A staff member experiencing harm may also access a range of services and supports.
    1. [Our Employee Assistance Program \(EAP\) through Canopy](#) is available to all staff – whether full-time, part-time or temporary, with or without other OFB benefits. These resources can be accessed day or night, as well as 24/7 opportunities to connect with licensed mental health professionals by phone at 800-433-2320 or text at 503-850-7721. Cascade Centers also has resources specific to [coping with violence and racism](#).
    2. [There are a host of health and wellness resources](#) available to those covered through OFB's Kaiser health plans.
    3. Emergency Psychiatric Services are available by phone 24/7 to individual members. The number is 866-453-3932. This line is staffed by masters and doctoral-level mental health professionals who specialize in helping people in crisis. The professional staff can either help the member over the phone and/or get a rapid access in-person appointment with a KP therapist if needed.
    4. Alternatively, Kaiser patients with established care with mental health professionals can do phone and video visits. (These are for patients who have an already-established care relationship with a KP therapist.)
    5. *Emergency Medical Services*: If the situation is potentially life-threatening, get immediate emergency assistance by calling 911, available 24 hours a day.
    6. *Substance Abuse and Mental Health Services Administration (SAMHSA) Treatment Referral Helpline*: 1-877-SAMHSA7 (1-877-726-4727) Get general information on mental health and locate treatment services in your area. Speak to a live person Monday through Friday, from 5am to 5pm PST.
    7. *NAMI: National Alliance on Mental Illness (NAMI) Helpline*: 800-950-NAMI or text "NAMI" to 741741 in a crisis.

8. For suicide prevention supports, staff can contact <https://translifeline.org/> or <https://suicidepreventionlifeline.org/>.
9. Contact Call to Safety's (formerly Women's Crisis Line) 24/7 crisis line for support and information at 503-235-5333 / 1.888.235.5333 or <https://calltosafety.org/> (Free and confidential)
- iii. A staff member experiencing harm [can initiate processes to access support through EPCA](#).
- iv. For racially-motivated harm team members can contact [Lines for Life Racial Equity Support Line](#).
- c. Their supervisor will alert their Community Philanthropy Director and Associate Director that harm has been experienced in donor relations (likely including the staff member's and donor's identities).
- d. They will meet with their supervisor to document the incident and begin the process to ASSESS how to progress.
  - i. The supervisor will need to determine the staff person's preference for anonymity.
  - ii. The supervisor will also need to clarify the limitations of anonymity due to [data-management protocols](#) and how anonymity will influence the next steps of the process.
  - iii. Once harm has been reported, the donor identity will not and must not remain anonymous to [ensure broader organizational reporting that mitigates risk of future harm to other staff members](#) who may engage with the donor.
  - iv. The supervisor will reinforce for the staff member (through conversation and future supervision/coaching) that the staff member will not be retaliated against for having reported harmful engagement. See [Community Philanthropy Staff Bill of Rights](#).
  - v. The supervisor will help the staff member to consider whether remaining in relationship with the donor will propagate future harm for the staff member.
- e. [EPCA or the staff member's supervisor will notify other OFB employees outside of Community Philanthropy who may be at risk of harm \(as appropriate in consideration of other existing guidelines\)](#).

**5. ASSESS: With guidance from their supervisor, the staff member will assess whether or not the staff member will continue engaging the donor.**

- a. In determining the future of the relationship between the donor and staff member, a staff member's integrity and well-being will be prioritized over Oregon Food Bank's fiscal health. The following should also be considered:

- i. The staff member's personal sense of integrity, well-being, and safety.
  - ii. The staff member's preference.
  - iii. The likelihood of future harm and escalated harm.
  - iv. Whether another staff member could engage the donor in the future without experiencing a compromise to integrity and well-being.
  - v. Potential risks to team and departmental morale should the staff member remain in relationship with the donor.
  - vi. Potential risks to other team members and teams (beyond Community Philanthropy) at Oregon Food Bank should the staff member remain in relationship with the donor.
  - vii. Oregon Food Bank's responsibility to mitigate potential harm to the staff person.
- b. If the staff member feels comfortable continuing the relationship, they have the option to do so - potentially in consultation with the Community Philanthropy Director, EPCA Director, Deputy CEO, or CEO (and at the discretion of the supervisor and/or Community Philanthropy Director).
- c. If the staff member would like to address their harm directly with the donor perpetrator (or - should the perpetrator work for an organizational funder - another representative in the company/foundation/organization in which the perpetrator works) they are free to do so, with support from their supervisor and/or the Community Philanthropy Director and/or from EPCA.
  - i. This could include the staff member engaging the donor independently.
  - ii. This could include the staff member engaging the donor with a supportive colleague.
- d. If the staff member feels ongoing engagement will compromise their integrity and well-being, the supervisor and Community Philanthropy Director will determine whether another team member will engage the perpetrator in the future.
  - i. Should the perpetrator work for an organizational funder - the supervisor and Community Philanthropy Director can help explore with the funder whether another representative in the company/foundation/organization in which the perpetrator works could serve as a primary point of contact for OFB.
  - ii. An alternative lead for ongoing relationship management can choose to take on the relationship only if they are aware of past harm perpetrated.

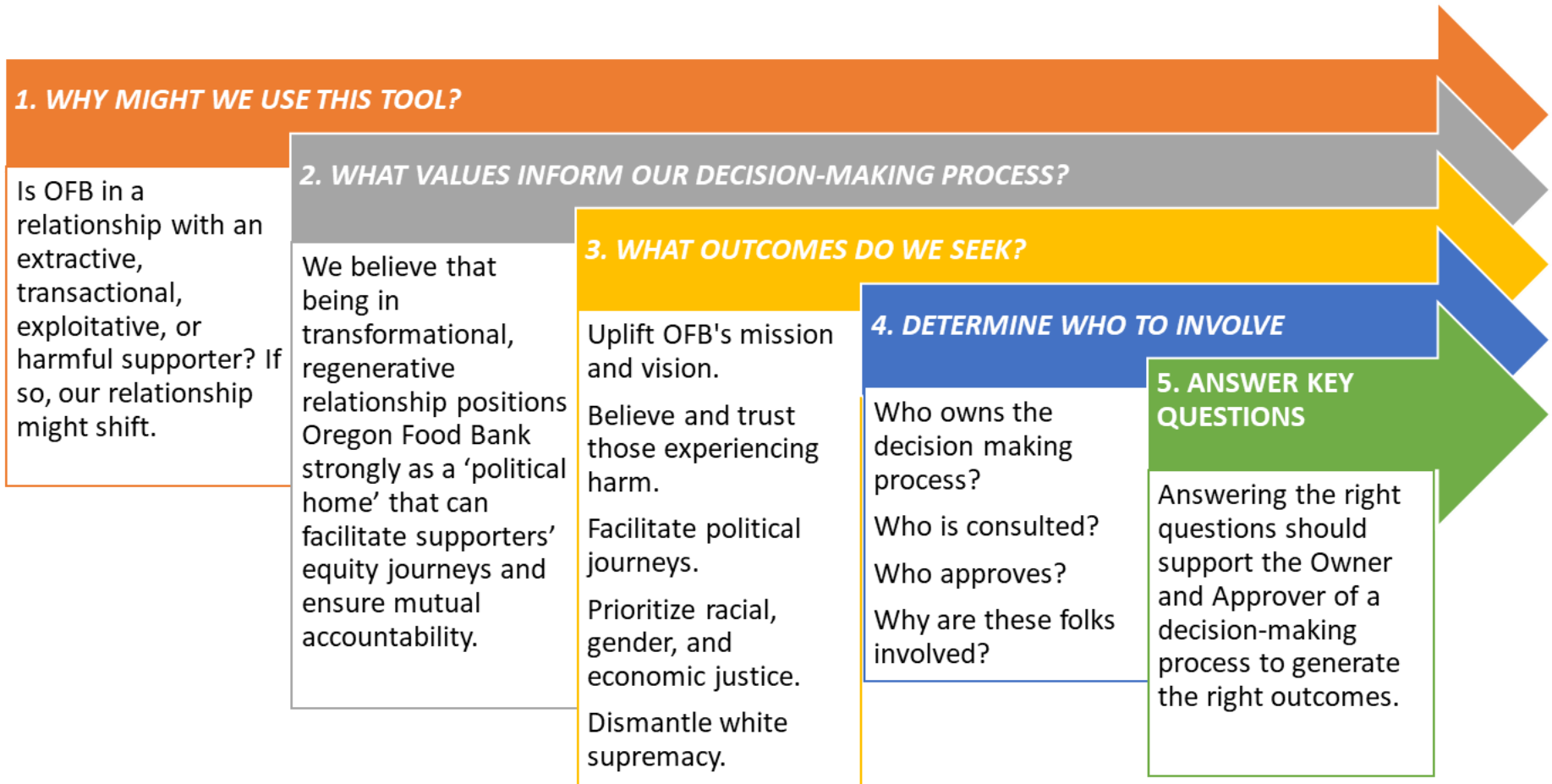
- iii. If relationship management is transferred to another team member, the supervisor and Community Philanthropy Director will use best judgement in not establishing a relationship wherein harm is likely to be perpetrated again.
  - 1. For example, if a woman on the team experiences sexual harassment from a donor, we would not reassign that relationship to a woman on the team.
  - 2. For example, if a team member experiences a racially-motivated microaggression, we will not reassign the relationship to someone whose racial/ethnic identity would make them vulnerable to a similar experience of harm.
- e. A staff member experiencing a compromise to their integrity and well-being may utilize the [Strategic Decision Making Framework: Ending Donor Relationships](#) to recommend indefinite severance of a relationship.
  - i. Severance could include discontinuation of active relationship management and/or proactive communication between OFB and a donor while continuing to receive financial support from the donor, as feasible without relationship management.
  - ii. Severance could include discontinuation of active relationship management and/or proactive communication between OFB and a donor, and refusal to accept financial contributions.

#### **6. FOLLOW-UP:**

- a. A staff member's supervisor or EPCA will ask permission to follow up in support of a staff member who has activated these standard operating procedures.
  - i. If permission is given, the supervisor or EPCA will follow up to share updates on process activated by these standard operating procedures.
  - ii. If permission is given, the supervisor or EPCA will follow up with the final outcome of process activated by these standard operating procedures.
- b. If permission to follow up is not initially given, a staff member can change their mind, follow-up with inquiries, or request follow-up to learn more about process activated by these standard operating procedures.

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# A GUIDE FOR ENDING DONOR RELATIONSHIPS



## STRATEGIC DECISION MAKING FRAMEWORK: ENDING DONOR RELATIONSHIPS

This tool provides a strategic decision-making framework and process for determining whether and how to discontinue relationship with a harm-causing donor while remaining in integrity with OFB's organizational values.

### 1. WHY MIGHT WE USE THIS TOOL?

If we find ourselves in a relationship with an extractive, transactional, exploitative, or harmful supporter our relationship might shift. A decision to shift our relationship may be prompted by:

- Emotional, psychological, or physical harms or threats of harm to staff including sexual harassment and identity-based aggressions (epithets and other verbal/written abuse) rooted in racism, transphobia, heterosexism, xenophobia, sexism, and more.
- Extractive and exploitative business practices including use of forced or coerced labor, labor practices that drive poverty and hunger, and environmental degradation.
- High profile policy advocacy, association with others, or media attention in gross misalignment with Oregon Food Bank's values (we may not always agree and some disagreement may be so extreme that a reconciliation is necessary).
- An organized campaign against Oregon Food Bank and our communities, including intentional harassment over social media, email, and phone.
- Ultimatums or conflicts of interest that compromise or require Oregon Food Bank to suspend our strategies to end hunger and hunger's root causes.
- Serious compromise to community morale (including staff - we are the community - within and beyond Community Philanthropy).
- A lack of accountability or interest in accountability from a supporter within the context of any of the above prompts.

## **2. WHAT VALUES INFORM OUR DECISION-MAKING PROCESS?**

We believe that being in [transformational, regenerative relationship](#) positions Oregon Food Bank strongly as a 'political home' that can facilitate supporters' equity journeys and ensure mutual accountability. When a donor has caused harm, we seek:

- The safety, integrity, and well-being of our community - including those harmed or at risk of harm.
- Support for and input from a staff member harmed ([Harmful Engagement in Donor Relations SOPs](#) provides guidance on supporting staff as well as relationship management considerations).
- Opportunity for learning and repair in the spirit of restorative justice - including our provision of resources to facilitate learning and growth.
- A plan for and/or meaningful progress toward acknowledging wrongdoing, demonstrating accountability, and understanding the harm to avoid repeating harm.

## **3. WHAT OUTCOMES DO WE SEEK?**

- Uplift Oregon Food Bank's mission and vision: to end hunger and hunger's root causes, and realize resilient communities that never go hungry.
- Believe and trust those experiencing harm and prioritize the integrity and well-being of our community, including staff.
- Facilitate political journeys - imbuing our relationships with love that fosters long-term spiritual growth.
- Prioritize racial, gender, and economic justice for equity constituencies and those experiencing food insecurity.
- Dismantle white supremacy, decolonize our profession, and usher in a just transition for philanthropy by decentering money to center love and equity.



#### 4. WHO IS INVOLVED IN DECISION-MAKING, HOW ARE THEY INVOLVED, AND WHY ARE THEY INVOLVED?

WHO OWNS THE DECISION-MAKING PROCESS?	WHO IS CONSULTED?	WHO APPROVES?	WHY ARE THESE FOLKS INVOLVED? Involvement may be informed by the organizational risk represented in relationships with donors who have significant financial impact, visibility, and influence, as well as the complexity of cross-departmental relationships management.
ComPhy Lead on a ComPhy Program	Individual Harmed, Other Teams w/ Relationship	ComPhy Lead's Supervisor	Donor is Unmanaged and/or gives <\$10,000 annually and/or engages with OFB making a material philanthropic impact (volunteer hours, in-kind services, food, etc).
Relationship Manager	Individual Harmed, Other Teams w/ Relationship	RM Supervisor (ComPhy Director when there is disagreement)	Donor gives <\$10,000 annually and/or is Managed and/or engages with OFB making a material philanthropic impact (volunteer hours, in-kind services, food, etc).
Relationship Manager	Individual Harmed, Other Teams w/ Relationship, ComPhy Director, potentially LT	ComPhy Director (LT when there is disagreement)	Donor gives \$10,000-\$50,000 annually and/or is Managed and/or engages with OFB making a material philanthropic impact (volunteer hours, in-kind services, food, etc), and/or is a BIPOC-led or BIPOC-community-based partner, and/or a qualitative risk is assessed due to a partner's visibility and network.
Relationship Manager	Individual Harmed, Other Teams w/ Relationship, ComPhy Director, LT	Leadership Team	Donor gives \$50,000+ annually and/or is Managed and/or is a member of OFB's Board of Directors and/or engages with OFB making a material philanthropic impact (volunteer hours, in-kind services, food, etc), and/or is a BIPOC-led or BIPOC-community-based partner, and/or a qualitative risk is assessed due to a partner's visibility and network.

## **5. WHAT QUESTIONS SHOULD BE ASKED & ANSWERED BEFORE FINALIZING A DECISION?**

Asking and answering these questions should support the Owner and Approver of a decision-making process to generate the right outcomes. The Owner and Approver can explore together the extent to which these questions are essential to a process, considering the unique circumstances of each situation that warrants a decision.

- Is there an opportunity to advance our mission and vision?
- What actions will benefit and advance the interests of our equity constituencies? What actions will protect the status quo and advance the interests of dominant culture?
- What strengths, resources and power can OFB bring to this moment to benefit equity constituencies?
- Describe the harm that was caused and who was impacted.
- Describe the process of healing and repair that has been attempted or facilitated, if any. How long if at all has that process been active? What have been the results from that process? Why wouldn't we pursue such a process if we haven't already?
- What recommendation is being made? Were those impacted included in the decision-making process? Is there consensus on a path forward? If not, explain the different points of view.
- What organizational values are we espousing/uplifting with the recommendation being made?
- What risk do we incur from maintaining or ending the relationship? For example...
  - Either way, what's the impact on our human resource, finances, emotional labor, other relationships, brand, etc.?
  - What do we stand to lose if we end this relationship? What do we stand to gain?
- If we end this relationship now, do we want to revisit this sometime in the future? What would need to change? Can you suggest a prescriptive period of time?

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# A GUIDE FOR DOCUMENTING HARMFUL ENGAGEMENT IN DONOR RELATIONS

## DOCUMENTING HARMFUL ENGAGEMENT

The following guidelines for documenting harmful engagement are based on the advice of Oregon Food Bank's legal counsel to ensure we are able to prevent future harm by recording past experiences in a consistent manner.

- **KEEP IT BRIEF** - "A staff member experienced a compromise to their integrity and well being rooted in (*examples*: their racial identity/gender identity/sexual orientation) or (*examples*: feeling objectified or sexualized or groomed for sexual harassment)."
- **JUST THE FACTS** - No editorializing about a donor's character or perceived behaviors. If it's a written communication, copy and paste or transcribe the communication, or make a PDF.
- **FOCUS ON STAFF EXPERIENCE** - "The staff member experienced a micro-aggression rooted in xenophobia..." not "The Donor was racist..."
- **ANONYMIZE STAFF** - Do not use a staff member's name.

## HARMFUL ENGAGEMENT DATA MANAGEMENT

**RE (Raiser's Edge NXT) Process - All Communication is tracked in Media, Actions, and Annotations as needed**

### 1. WRITTEN LETTER OR NOTE

- a. ComPhy Ops or other staff scans item and upload it into the RE Media File
  - i. Type = Other
  - ii. Title = Harmful Donor Communication
  - iii. Date = Date of offence
  - iv. Added by = RE User
  - v. Description ex = Staff experienced a compromise to their integrity
- b. Supervisor notifies the DCP, CPAD, and Main OFB Solicitor with donor name and RE ID and sends a scan of the communication.
- c. Add an annotation to the donor's RE record that will show upon opening to other RE users, that a flagged interaction has occurred. The Annotation should note "OFB Staff Alert! - See Action/Media from <Date>"

### 2. PHONE CALL OR VIDEO MEETING

- a. OFB Staff person communicates with their supervisor who captures the best representation of the offending communication. Supervisor will notify

DCP, CPAD and supervisor and Main OFB Solicitor (if not self) with the best representation of the offending communication

- b. Supervisor will enter Action in RE
  - i. Category = Phone Call
  - ii. Action Type = Varies (from drop down menu)
  - iii. Date = Date of offense
  - iv. Solicitor = as needed (Or Confidential)
  - v. Description ex = Staff experienced a compromise to their integrity
  - vi. Status = Completed
  - vii. In Notes/New Notepad
  - viii. Date = Date of offense
  - ix. Type = Contact Report (2-way)
  - x. Description ex = Staff experienced a compromise to their integrity and well being rooted in (examples: their racial identity/gender identity/sexual orientation) or (feeling objectified or sexualized or groomed for sexual harassment).
  - xi. Notepad = pasted email sent prior outlining offensive communication
- c. Add an annotation to the donor's RE record that will show upon opening to other RE users, that a flagged interaction has occurred. The Annotation should note "OFB Staff Alert! - See Action/Media from <Date>"

### **3. EMAIL COMMUNICATION**

- a. OFB Staff person forwards the email to DCP, CPAD and supervisor and Main OFB Solicitor (if not self)
- b. Supervisor will enter Action in RE
  - i. Category = Email
  - ii. Action Type = Completed
  - iii. Date = Date of offense
  - iv. Solicitor = as needed (Or Confidential)
  - v. Description ex = Staff experienced a compromise to their integrity
  - vi. Status = Varies (from drop down menu)
  - vii. In Notes/New Notepad
  - viii. Date = Date of offense
  - ix. Type = Contact Report (2-way)
  - x. Description ex = Staff experienced a compromise to their integrity and well being rooted in (examples: their racial identity/gender identity/sexual orientation) or (feeling objectified or sexualized or groomed for sexual harassment).

- xi. Notepad = pasted email sent prior outlining offensive communication
- c. Add an annotation to the donor's RE record that will show upon opening to other RE users, that a flagged interaction has occurred. The Annotation should note "OFB Staff Alert! - See Action/Media from <Date>"

#### **4. IN PERSON INTERACTION**

- a. OFB Staff person communicates with their supervisor who captures the best representation of the offending communication. Supervisor will notify DCP, CPAD and supervisor and Main OFB Solicitor (if not self) with the best representation of the offending communication.
- b. Supervisor will enter Action in RE
  - i. Category = Meeting
  - ii. Action Type = Completed
  - iii. Date = Date of offense
  - iv. Solicitor = as needed (Or Confidential)
  - v. Description ex = Staff experienced a compromise to their integrity
  - vi. Status = Varies (from drop down menu)
  - vii. In Notes/New Notepad
  - viii. Date = Date of offense
  - ix. Type = Contact Report (2-way)
  - x. Description ex = Staff experienced a compromise to their integrity and well being rooted in (examples: their racial identity/gender identity/sexual orientation) or (feeling objectified or sexualized or groomed for sexual harassment).
  - xi. Notepad = pasted email sent prior outlining offensive communication
- c. Add an annotation to the donor's RE record that will show upon opening to other RE users, that a flagged interaction has occurred. The Annotation should note "OFB Staff Alert! - See Action/Media from <Date>"

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