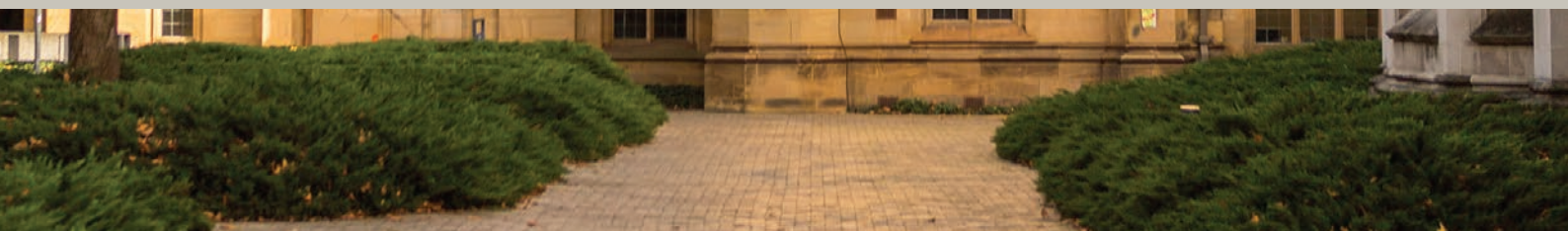




# SAFE

## EXTERNAL MEETINGS TOOLKIT

The Safe External Meetings Toolkit has been put together by Advancement staff at the University of Melbourne for their colleagues as a resource of advice and information to help them stay safe as they carry out their work, no matter what role they undertake.



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## PREFACE

# UoM Advancement recognises and adheres to the Zero Tolerance Policy pledge developed by CASE.

The Pledge is provided here for all Advancement staff and to provide a framework and context for this important Toolkit which has been prepared to provide all Advancement staff with the information, advice and resources they need to feel safe and comfortable in the execution of their roles.

1. In the University of Melbourne Advancement office we will do all we can to create a working environment of mutual respect and safety. We will be clear that harassment will not be tolerated in any context.
2. We will ensure an environment in which a staff member can report potentially uncomfortable or abusive situations without fear of professional reprisal.
3. We will take any complaint seriously and respond promptly.
4. We will adhere to our organisational policies in this regard.
5. We will ensure that we develop engagement, cultivation, or solicitation strategies that do not put a staff member at risk of harassment or abuse.
6. We will ensure that staff members are not asked to operate in unsafe organisational or social environments.
7. In the case of any relationship in which there is a continuing potential for harassment or untoward activities, we will take the necessary action to mitigate this potential.
8. If anyone continues to harass or otherwise create a dangerous or potentially abusive environment for staff, we will sever the relationship between that individual and the institution we serve.

## ACKNOWLEDGEMENTS

The University of Melbourne Advancement Office would like to thank all of the staff who provided their input into this Toolkit, sharing their personal experiences of situations they have had to navigate as well as advice on what has worked well to address and prevent such situations arising in the first place. We would also like to thank colleagues at CASE (The Council for Advancement and Support of Education) for reviewing this document and sharing the resources in their Library.

SECTION 1

# Setting up successful face-to-face meetings



A recent Chronicle of Philanthropy and Association of Fundraising Professionals survey found that about **twenty-five percent of female fundraisers** and **seven percent of male fundraisers** have experienced sexual harassment in the workplace. Nearly two-thirds of people who reported sexual harassment blamed donors.

## A. UNDERSTANDING CULTURAL AND OTHER CONTEXTS

There are a number of articles online that describe individual fundraisers' experiences of sexual harassment.

What lies at the heart of all of them is the unequal power dynamics created when you place a fundraiser and a donor in the same room. These dynamics are exacerbated when you add significant wealth, gender, race and age differences, but unequal dynamics are not exclusive to donor fundraising interactions. Understanding these contexts is crucial when planning and preparing for any meeting with external stakeholders.



READ THE FULL REPORT HERE:

[philanthropy.com/interactives/fundraiser-poll](https://philanthropy.com/interactives/fundraiser-poll)

## B. PLANNING THE SETTINGS FOR MEETINGS

It is always best to meet a donor or volunteer in a neutral space, ideally in a University managed venue.

Donors often value a degree of privacy in their discussions about giving or volunteering for the University, so you need to find a way to balance this with a safety-first approach to your meetings.

You could link the intent of your engagement with a particular space – for example if you wish to interest a potential donor or volunteer in student support, then pick an area where they can experience student life.

You should avoid meeting a donor in their own home or a private space of their choosing unless you are accompanied by another staff member or feel entirely comfortable with your interactions with the donor or volunteer.

A meeting can also take place at a public space such as **their** professional offices, a cafe, library etc. It's always best to ensure the meeting place has other people around, and is easily accessible.

### **When meeting donors or volunteers, you should:**

- Advise your supervisor or colleague of your meeting details
- Ensure your supervisor has your contact number
- Provide an expected time of return

## C. RECOGNISING WHEN YOU FEEL THE ENVIRONMENT IS UNSAFE

There are many factors that can make an environment feel unsafe, including:

- Being in a remote location
- A location in which there are no other people are present
- The behaviour of the people you are meeting makes you feel uneasy, for any reason
- When you notice aspects that may pose a threat to your physical safety, such as trip hazards, a requirement to climb unsafe stairs, etc.

If you find yourself in this situation and have not commenced a meeting, you can phone and politely cancel. If you have commenced a meeting, then excuse yourself to leave the area, and retreat to a safe space and phone your supervisor or colleague. **Don't doubt your instincts.**





SECTION 2

# Managing communications:

Helping you set the scene and set expectations

## A. SETTING THE SCENE

When setting the scene for your meeting, consider:

1. **The venue you have chosen;**
2. **The seating arrangements;**
3. **The time of day;**
4. **Whether or not alcohol is served.**

This will vary from meeting to meeting, but if in doubt, err on the side of a formal setting, taking place earlier in the day.

## B. SETTING EXPECTATIONS

**Setting expectations and creating boundaries when it comes to communicating, especially after hours, are essential.** Creating specific work hour boundaries is a great first step in setting the tone for a healthy and balanced relationship with alumni, donors and supporters. While optimal working hours for each individual depends on their habits, office hours, work hours and other factors, they usually run between 8am-10am and 4pm-6pm. So, if you are available around 8 hours a day, 4 to 5 days a week, you're giving external contacts a wide variety of potential times to get in touch with you. Of course, you'll have to accommodate for emergencies at work and how you should be contacted when that occurs.

### IMPROVE THE QUALITY OF COMMUNICATIONS

One way to minimise contact after-hours is to improve the quality of communications during the working week. Keeping donors and supporters well-informed about events they might have been invited to or providing progress updates on the gifts you may cultivate or steward will foster trust and confidence.

### KEEP SEPARATE PHONE LINES

You might like to consider a separate phone number for work. This can be one of the best ways to prevent after-hours communications. Voicemail is also an effective way to give supporters an opportunity to leave a message but not interrupt your personal time.

### SPECIFY EMAIL RESPONSE TIMES AS WELL AS PHONE TIMES

People might also attempt to contact you via email after-hours, you need to consider whether you want to answer immediately. After hours communications may cut into your personal time during evenings and weekends. It's important to consider that the alumni, supporters and donors we engage with might only work on their philanthropic or volunteer interests after hours; much like setting a time for phone calls, you can also set times for email responses. Depending on your and the donors' preferences and needs, these hours can be the same or different than your phone hours.

## TEXTING V. EMAIL (WHEN EACH IS APPROPRIATE/INAPPROPRIATE)

As our mobile phones become more powerful, the distinction between texting and email is becoming a less defined one. However, key differences still remain and, in many situations, the immediacy and simplicity of a text message makes using this medium preferable to sending an email.

Some of our alumni and supporters, particularly those located internationally, will favour WeChat or WhatsApp for their communications.

Texting or messaging via an App is dependent on the type of rapport you have, whether this individual has given permission and how well established the relationship is. Many people believe that text messaging is still personal communication that requires urgent attention, and that texting people you're soliciting business from when you don't know them is considered tasteless.

If, however, you have a good rapport with your prospect, alumni or business colleague, texting during business hours can be appropriate if it's about finding a meeting place, notifying this person that you are running late to a meeting, following up to a question or providing something of value.

Consider the following when deciding when to use a text message vs an email to communicate with a donor or supporter.

### IMMEDIACY

Texts and messages are delivered immediately and directly to a device that most of us have with us at all times. Not as many of us are checking email on such a regular basis – even if someone owns a phone capable of sending and receiving email, there's no guarantee email is being checked as regularly as text messages. SMS messages have more of a sense of urgency, whereas email tends to be seen as information that can be responded to at a later date.

With mobile numbers typically more closely guarded

than email addresses, a text message also represents a more personal and intimate connection.

### MOBILITY

The benefits of being able to receive an SMS anywhere also needs to be considered. When travelling or making arrangements to meet someone when out and about, you may feel a text message might be more appropriate.

### BREVITY

A text message is almost always shorter and to the point. While email may be preferable for discussing topics in-depth, texting has the advantage when it comes to making quick arrangements or sending shorter messages.

### TIMING OF COMMUNICATIONS (AFTER HOURS OKAY/NOT OKAY?)

When it comes to communicating to donors and supporters it is important to consider the timing of your communications. The best communicators know how to time what they say to coincide with when their audience is most receptive. Whether that's in online communications or offline conversations, there's no difference.

Emails are the most frequently used means of communication for any organisation in Australia. However, international alumni, donors and supporters may use WhatsApp or WeChat more regularly than email. Email is what we use in Advancement to manage projects, communicate with team members or donors and external stakeholders.

While you might think that being available 24/7 is the best way to support external stakeholders, you could be sabotaging the quality of your work by doing so. Taking time off work and making the most of your evenings and weekends, has been scientifically proven to correlate with higher productivity at work.



## C. SITUATIONAL MATTERS

### WINDING BACK COMMUNICATIONS THAT ARE BECOMING TOO INFORMAL

When you are conducting introductory meetings with donors, it's common to start with 'small talk' to get to know each other on a personal level, prior to discussing the objectives of the meeting. Questions relating to how long you have been in the role, your previous experience and academic background are all appropriate topics of conversations. Once you have met with a donor several times and built rapport, it's not uncommon for conversations to touch on aspects of your private lives. This could include anecdotal information about your family life and interests outside of work.

It's important to note that at no stage of the relationship with the donor are you obligated to reveal personal information, for example your marital status, sexual preference or any other likes or dislikes which are either not related to the purpose of the meeting or what is considered the norm in terms of general and polite conversation.

If the conversation starts to take a tone which feels too informal, you could try the following tips to redirect the conversation:

- Readjust your posture to a more formal position;
- Start looking through any documents or your notebook and start reading the notes;
- Indicate that you have a meeting immediately afterwards and would like to start discussing the topic at hand;
- Use phrases such as 'well I think we should get started' and refer to your notes;
- If none of the above are successful, maintain confidence and state 'I think we're getting off topic and I'm getting uncomfortable, could we please start discussing x, y, z'...

As well as actually changing the topic, you may wish to consider your body language and non-verbal communication, such as turning away slightly from the other person, or looking over their shoulder, as a way to distance yourself from the topic they have brought up.

A simple way to change the subject is to ask the person you're talking to a question.

Say the person you're meeting with asks if you have a boyfriend/girlfriend or when you are going to get married. You can ask the other person a similar, but less personal question, asking about their family members or friends. It can be related to what they asked you, but gets the other person talking on a topic that is obviously interesting to them.

With the relationship example, you can say, "Not just yet. How is your son / daughter getting on at his / her new job?"

Then you're avoiding starting an in-depth conversation about something that makes you feel uncomfortable.

In any situation, it's important to know and understand your own personal boundaries (what you feel comfortable sharing) and to never feel as though you have to cross these boundaries for the sake of appeasing the donor.

### REBUTTALS FOR INAPPROPRIATE COMMENTS

Use your best judgment as to what will work best in the situation and work out what kind of response suits your personal style while still getting your desired message across.

In responding to inappropriate comments, will deploying non-verbal communication such as raising eyebrows indignantly and/or staring in disbelief get your point across, or will it have the desired effect from the point of view of the person who made the inappropriate comment?

You may wish to change the subject.  
Keep in mind that intonation is really important.

Depending on the situation, you may want to be funny or sarcastic, or you may want to show annoyance or quiet acknowledgement that you, or some of the people present may have been offended.

You may want to be politely direct and call out the expression, behaviour or statement that you found offensive.

Or you may just want to change the subject in a matter-of-fact way. Try one of these expressions for a subtle cue to the commenter to desist:

“Moving on...”

“Anyway...”

### **CALLING OUT AND EXPRESSING WHEN NOT HAPPY ABOUT THE DIRECTION OF A CONVERSATION**

Ask a question about what they really mean – this allows you to alert them something is off and gives them the opportunity to clarify. It also keeps you from assuming too much.

Learn how to separate offence from insult. It's extremely easy to offend somebody without even trying. But an insult is much more intentional, where somebody purposely wants to demean you or make you feel bad.

You might say: “I feel slightly offended by this and I'm not sure I'm supposed to. What were you saying here?”

Alternatively, bring up another time when things were better.

You might say: “We've always worked well together, but something has thrown us off track today, I'm not sure what it is. I know we can do this effectively because we always have.”

Remind the other person that you've been able to work through difficult situations in the past. Define your relationship in positive terms and suggests way in which you can get back on course.

## **D. ENDING A MEETING**

### **OR CONVERSATION**

Always trust your instincts and know that it is okay to end a meeting or conversation if you feel uncomfortable. Never feel you need to stay in a situation that makes you feel uncomfortable. There are many ways in which you could gracefully exit a conversation or meeting. You can use your words to convey that the conversation is over and you can also use your body language to indirectly end things.

### **END WITH A POSITIVE COMMENT**

A great way to end a conversation is to wrap things up with a positive comment. You can thank the person for his or her time, dropping the hint that you now need to exit the conversation. You could say something like, “I'm so glad we had time to talk” or “Thanks very much for your time”. If the other person doesn't take the hint, you could say something like, “Well, thanks again, but I really do have to get going”. Most people will not question a vague excuse and allow you to get on your way.

### **RETURN TO THE ORIGINAL PURPOSE OF THE CONVERSATION**

A good way to push a conversation to its natural end is to return to the conversation's original purpose. This can help bringing the conversation full circle, allowing you to exit gracefully without seeming rude. Make a comment about the conversation's original purpose, indicating the conversation has accomplished that purpose and can now end. This could be something like, “Thank you for your advice, I'll feed that back”. Or, “That was really helpful, thank you for taking the time to meet with me”, and make your exit.

## LOOK FOR A NATURAL TRANSITION

In a given situation, you may be presented with a natural transition to end a conversation. If you are at a networking event for example, a speaker may begin talking. If you anticipate there may be a natural conversation-ender coming up, you may want to wait for that. This can prevent you from looking as if you want to back out of a conversation early.

## WAIT FOR A LULL IN CONVERSATION TO LEAVE

Conversations have natural ebbs and flows. You may both be conversing for a while and then there may be a natural pause. If you would like to get out of the conversation, try to wait for this pause. After a few seconds of silence, say something like, “Well, it’s been nice talking to you, but I really should get going.”

## USE A COMMON EXCUSE

One of the easiest ways to end a conversation tactfully is to use a common excuse. Say that you need to run to the bathroom, grab another drink, or are running late for another commitment.

## PULL ANOTHER PERSON INTO THE CONVERSATION

At a networking event you can always pull another person into the conversation. Offer to introduce the other person to someone else. You can also bring them along if you get pulled into another conversation.

## CONVEY THE CONVERSATION IS OVER USING BODY LANGUAGE

Don’t forget the importance of non-verbal cues. 55% of communication is body language, 38% is the tone of voice, and 7% are the actual words spoken.

There are many different types of non-verbal communication, including:

- **Body Movements** – hand gestures, nodding or shaking the head;
- **Posture** – how you stand/sit or whether your arms are crossed;
- **Eye Contact** – where the amount of eye contact often determines the level of trust/trustworthiness;
- **Para-language** – or aspects of the voice apart from speech, such as pitch, tone, and speed of speaking;
- **Closeness or Personal Space** – determines the level of intimacy;
- **Facial Expressions** – smiling, frowning and blinking.

Oftentimes, non-verbal cues can be used to end a conversation without feeling rude. You can indicate with your body that the conversation has ended. This may help the other person get the hint without spelling it out directly.

If you’ve been sitting down, try standing up. This can indicate you have somewhere to go. You can also move towards the door.

Keep your responses short and quick or simply smile or nod.

Check your phone or watch to indicate your time is running short and you need to get going.

## E. SETTING YOUR OWN BOUNDARIES

It is important to **understand your own boundaries** and determine what you are prepared to accept and what you are not. This may vary depending on the situation and the person who you feel has crossed a line.

There are a number of resources available online that can help you unpack this and work out whether something has been said unintentionally or deliberately and how you might respond to each.

Consider exploring these and reflecting on what matters to you and where you want to draw the line.

## F. ASSERTIVENESS TRAINING FOR STAFF

Being assertive means being direct about what you need, want, feel or believe in a way that's respectful of the views of others. It's a communication skill that can reduce conflict, build your self-confidence and improve relationships in the workplace. Assertiveness training for staff with practical role-play examples will be beneficial in preparation for difficult conversations with donors.

Here are some general tips to help you learn to be more assertive:

- **Make the decision to positively assert yourself.**  
Commit to being assertive rather than passive or aggressive and start practising today.
- **Aim for open and honest communication.**  
Remember to respect other people when you are sharing your feelings, wants, needs, beliefs or opinions.
- **Listen actively.**  
Try to understand the other person's point of view and don't interrupt when they are explaining it to you.
- **Agree to disagree.**  
Remember that having a different point of view doesn't mean you are right and the other person is wrong.



- **Avoid guilt trips.**  
Be honest and tell others how you feel or what you want without making accusations or making them feel guilty.
- **Stay calm.**  
Breathe normally, look the person in the eye, keep your face relaxed and speak in a normal voice.
- **Take a problem-solving approach to conflict.**  
Try not to see the other person as an enemy.
- **Practise assertiveness.**  
Talk in an assertive way in front of a mirror or a friend.  
Pay attention to your body language as well as the words you say.
- **Use “I”.**  
Use statements that include “I” in them such as “I think” or “I feel”.  
Don’t use aggressive language such as “you always” or “you never”.
- **Be patient.**  
Being assertive is a skill that needs practice. Remember that you will sometimes do better at it than at other times, but you can always learn from your mistakes.

#### **NOTE:**

UoM Advancement staff will run a session on Safe External Meetings at least once per year. Assertiveness tips will be covered in this training or speak to your Manager if you would like to explore more formal assertiveness training as a part of your professional development.



SECTION 3

# The challenges of travel:

International or Regional

## A. SCHEDULING MEETINGS

- It is often convenient and appropriate to meet in the lobby or restaurant of your hotel when you are travelling internationally or regionally on University business.
- Ensure that you set a meeting start and finish time and confirm the finish time with your donor at the beginning of the meeting.
- Never invite a donor to visit your hotel room. If a donor specifically asks, “which room are you staying in” you can reasonably reply with a floor level (and you don’t have to give them the correct one!)
- When in doubt, don’t go. If for any reason you feel uncomfortable about meeting a donor or engaging in a conversation, excuse yourself.

## B. IMPROMPTU MEETINGS AND INFORMAL INVITATIONS

- If you are travelling internationally to run events, you will often find that you receive invitations from the event participants for other unplanned get togethers. These can include things like ‘after parties’, catch ups the next day or to get something to eat after a drinks reception.
- In the main, these are harmless offers from enthusiastic alumni and supporters of the University who are delighted that you have travelled to their home town and wish to host you and make you feel welcome.
- However, you should think very carefully about accepting one of these invitations if you are to be the only person from the University going along, unless you know the people involved very well.

- If you accept an informal invitation, be sure that colleagues who are not involved in the informal activity know where you are and what your plans are to be (even if others are going along as well).
- If you feel in anyway unsure or uncomfortable about accepting the invitation – don’t. Politely decline or suggest a more suitable alternative.

## C. INTERNAL/LOCAL TRAVEL

- When you find out you are expected to travel think carefully about the scheduling of your flights. Are you travelling by yourself? Will you be arriving late at night?
- If you answer yes to either of these questions, how will you manage this? If you are not comfortable travelling alone or arriving late, speak to your line manager.
- If you need to travel internally within the country do some research about the acceptable methods of transport to use. Check whether using public transport is generally considered safe. If you prefer to use ride-shares, check whether this is locally acceptable.
- When travelling you often find yourself sharing transportation with donors, i.e., a lift to the train station or to a restaurant.
- When possible, plan ahead, and document these plans in your electronic calendar.
- When offered last minute transportation, trust your intuition. If you feel uncomfortable in any way, decline the offer – perhaps say you have already pre-booked your own transport – and make alternative arrangements.
- If a donor wishes to collect you from your hotel ahead of a planned meeting, suggest that you meet in the public foyer.

## D. CONTACTABILITY

- Ensure that your electronic calendar is up to date and accessible to colleagues, so that someone is always aware of where you are and who you are visiting with.
- Some staff members are conscious about the cost of using global roaming mobile services. Be aware that if you turn your data off when out and about internationally, you will make it hard for people to contact you.
- It is preferable to have data available for key apps and message services.
- The University has developed an International Traveler's pocket guide and will provide you with an International Medical Security Assistance card. You should get these before you travel – see the Resources section at the end of this toolkit for more information. This will ensure you have all the contact information you need while travelling.

## E. CULTURAL EXPECTATIONS

- International travel will bring with it a set of cultural expectations, i.e. the consumption of alcohol or unusual local foods, the removal of shoes before entering a house, covered shoulders in some religious buildings.
- It is important to respect these cultural expectations, so you are encouraged to find out ahead of time what may be involved; ask questions and see what the implications might be if you decline to participate.
- You are not expected to do something that makes you feel uncomfortable or goes against your own beliefs but in certain circumstances refusal to align with a cultural expectation might impact your ability to participate fully or even travel to certain countries.

## SECTION 4

# Working at events



## A. GETTING THERE AND

### GETTING HOME

If you are asked to work at an event there is as very good chance it will be taking place after hours. You should think carefully about what this means for you getting home after the event finishes.

If you normally drive to work, can you relocate your car nearer to the event venue? If the event is on campus and you can't move it closer than your normal car park, you can request an escort back to your vehicle. See the Resources section at the end of this toolkit.

If you come to work on public transport, are you safe to go home that way at the end of the event?

Staff working at after-hours events in Advancement can use cab charges or charge taxi or Uber fares to their corporate card, if they are expected to finish work late. If you haven't been offered a cab charge (or as many as you require) please ask. Don't assume because you haven't been offered cab charges or been asked if you need to get a taxi home that you're not entitled to take a cab. You are always entitled to ask for support to ensure you get home safely after working after hours.

## B. EVENT RISK ASSESSMENTS

Event staff planning for any major event in Advancement will undertake an event risk assessment. This includes exploring and assessing safety issues in relation to the event program, venue and participants.

If you are working at an event, the Event Manager/Coordinator should provide you with a briefing before the event. This briefing will cover items such as contact people in the case of any issues, either venue staff or Advancement staff.

If you have any concerns that the briefing hasn't answered all your questions or for some reason there was no briefing provided, please ask the Advancement staff who are managing the event.

Alcohol is usually involved in Alumni events. This adds an extra risk factor to the programming. The CASE Library has some helpful resources on dealing with risks at Alumni events, including some great suggestions for event planners and coordinators on how to manage the availability of alcohol to help keep everyone safe.

## C. WORKING ON YOUR OWN

Sometimes when you are working at an event you may be asked to greet people on arrival or staff a registration desk. There will be occasions when you undertake these tasks alone. For example, when an event is in a hotel and you are greeting guests on the ground floor and directing them to a function space on a higher floor.

If you are working alone at an event, you should ensure that you know who to go to in case of any concerns or issues. The Event Manager/Coordinators should point out to you the people you can go to if you need help – these may be venue staff, such as the concierge, front desk staff or security personnel, or they may be Advancement staff working in other areas of the event.

If you don't feel comfortable working alone, you can seek help. The Event Manager/Coordinator will work with you to decide how to manage the situation.

**Do not stay in a situation where you feel unsafe.**

## D. SUPPORTING ONE ANOTHER

Staff working at events are asked to look out for each other. If you see a colleague who looks uncomfortable, be sure to go and ask if they need assistance.

It may be a good idea to have a signal or codeword that you agree with a colleague which you can use if you need to get away from a conversation that is making you feel uncomfortable.

If you see anything you think is inappropriate at an event, you should notify the Event Manager/Coordinator. They will work out how best to deal with the situation and/or will determine whether venue security needs to be alerted.

SECTION 5

# Seeking support





## A. UNIVERSITY POLICY

The University of Melbourne Advancement Office (UoMA) has adopted the following principles in relation to seeking support.

- Regardless of role or level of seniority, you can expect to be listened to and trusted when you seek support from your manager or another UoMA staff member.
- If you report a situation involving an external party, you can expect appropriate action to be taken regardless of the importance of that external party (i.e. level of giving, involvement with the University, standing in the University or community etc).
- You will be supported through any situation that you report.
- This support will be provided confidentially unless your manager is obliged to report an incident which is serious and/or criminal in nature.
- Managers are also able, and are encouraged, to seek support to help them manage difficult, stressful or sensitive situations.

### POLICY

**The University's Appropriate Workplace Behaviour policy sets out the expectations for staff. Section 12.1 states:**

An employee or student who considers they may have experienced one or more of the following incidents by an employee is encouraged to seek assistance at any time from the University:

- i. discrimination;**
- ii. harassment;**
- iii. sexual harassment;**
- iv. stalking;**
- v. bullying;**
- vi. vilification;**
- vii. victimisation.**

The above applies also when staff members feel that they have been subjected to any of these behaviours, from an external person who is involved with the University. Staff who have experienced this behaviour have the right to seek informal assistance or to make a formal complaint.

The process for making a formal complaint is set out in the above policy in Section 12.3. This document deals with the process within UoMA of seeking support and/or making an informal complaint.

## B. LOCAL POLICY

You are free to identify the person you wish to seek support from.

UoMA would like to have a culture of openness and trust which ensures that staff feel empowered to raise issues with their manager. However, it is recognised that for a variety of reasons you may feel you cannot go to your manager.

### IF YOU FEEL YOU CANNOT GO TO YOUR MANAGER, YOU MAY WISH TO:

- Consider identifying a colleague or friend to be your ‘advocate’. Someone who can be with you and help follow up on other support services you have identified.
  - UoMA is developing a network of ‘buddies’ who have significant experience in dealing with external stakeholders. This program will be rolled out in 2019.
  - Refer to the University’s Health and Wellbeing website.
  - Refer to the University’s Safer Community Program website.
  - Seek support from the Employee Assistance Program (EAP).
  - Seek support from University Counselling and Psychological Services.
  - Contact UoMA’s local HR Manager for advice and assistance.
  - Refer to the Resources section of this Toolkit where other options for support are detailed.
- Ask you what course of action you would be open to following.
  - However, if the Manager feels the action is serious enough to warrant formal action (including criminal investigation) the Manager may have to follow through on this, even if you don’t want to press charges.
  - You can request that steps be taken so that you do not find yourself in a similar situation again. These steps may include but are not limited to:
    - Reassigning donors and prospects to another member of the team and alerting relevant team members to issues;
    - The Manager speaking with the external concerned to explain the University’s position on appropriate behaviour and to request a change in practice;
    - Training for you to feel better equipped to manage situations in the future;
    - ‘Black listing’ the external concerned from future invitations to events/activities;
    - Alerting others in UoMA to the behaviour for others to take appropriate action (e.g. a member of the senior leadership team or the individual’s relationship manager).
    - The actions that are ultimately taken will be negotiated and agreed between you and your Manager. You will never feel coerced into a course of action that you are not comfortable with.

### IF YOU APPROACH YOUR MANAGER, YOUR MANAGER WILL:

- Listen without judgement to the issue raised.
- The manager may need to document the details of the issues.

## C. THE ROLE OF THE MANAGER

**The role of the Manager after they have been informed of any situation will be assessed on a case by case basis.**

1. Managers are required to equip staff with the appropriate tools needed to handle situations where they will be in contact with externals to ensure that they feel empowered to manage those environments.
2. To this end, at Induction, Managers with new staff who will be expected to deal with externals must provide this Toolkit and offer a session on practical tips for handling situations involving externals, whether that is events, small group meetings or face-to-face (1 to 1) interactions.
3. Attend annual training session on Safe External Meetings practices.
4. Managers are expected to respond to any situation raised with them according to the principles listed at the start of Section 5.

### MANAGERS MAY BE:

- A sounding board for advice on how to address the situation;
- Required to take steps to resolve a situation;
- Required to adjust the workload and expectations on the staff member while the situation is being resolved;
- Obligated to take an issue forward if the University has a Duty of Care to investigate it further.

**It is noted that Managers may be juggling a number of these roles simultaneously.**

It is therefore important that Managers also feel they have the support and resources needed to manage any situations that are brought to them.

### MANAGERS MAY WISH TO:

- Refer to the Resources section of this Toolkit for materials that provide advice on dealing with serious and difficult matters.
- Refer to the University's Health and Wellbeing website
- Refer to the University's Safer Community Program website
- Report any incidents to the Police
- Recommend or seek their own support from the Employee Assistance Program (EAP)
- Recommend or seek their own support from University Counselling and Psychological Services
- Undertake Online training on Managing Difficult Situations (particularly if they are to undertake to speak with externals as part of the next steps to resolving the situation).



### For serious incidents:

Managers should contact UoMA's local HR Manager for advice and assistance. If the HR Manager is not available, they can also contact the University's Inappropriate Workplace Behaviour Line for advice on next steps. Managers are reminded that confidentiality should be maintained and only those who need to be made aware of any situations/incidents are provided with information.



SECTION 6

# Resources and further information

## A. KEEPING TRACK OF PEOPLES WHEREABOUTS

To create a safe workplace outside of the office, we encourage staff to share their whereabouts when conducting meetings with externals or travelling interstate and overseas.

Staff are encouraged to do the following:

- Maintain an up-to-date calendar including the address of the meeting, the attendees' names and contact information and your mobile number.
- If you have to conduct a home visit, discuss the meeting in advance with a colleague (line manager or team member) and hold the time in his or her diary.
- If appropriate, you should check-in with the same colleague before and after a home visit. In the instance that your colleague does not hear from you following the meeting, then they will make every effort to contact you. For this reason, you should keep your phone on you and set it to vibrate (for phone calls) throughout the meeting. If, after making every reasonable attempt to contact you, your colleague does not receive a response from you within two hours then they may contact the local police.

## B. TECHNICAL SOLUTIONS

### GET HOME SAFE

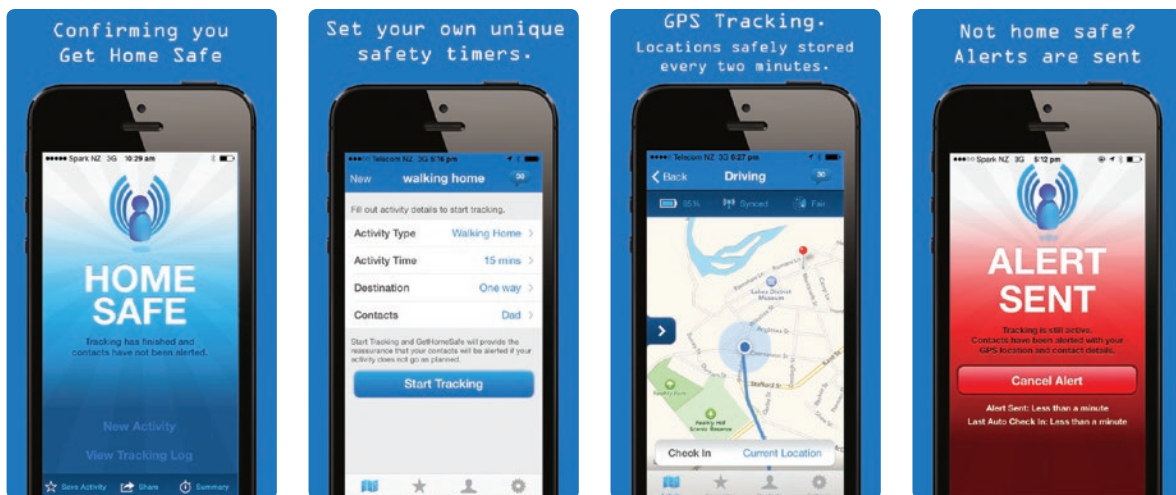
Staff conducting home visits or travelling interstate and overseas may wish to download a free personal safety app called **GetHomeSafe**.

**GetHomeSafe** enables you to set a 'safety timer' for when you will next check-in, for instance, after you have finished a donor meeting. If you do not check-in within the set time then a notification will be sent to your emergency contact, such as your manager or a colleague you are travelling with. The notification will share your GPS location even if you have no battery or coverage.

### OTHER SAFETY APPS

There are many other safety apps that staff can explore, including:

- **Bugle** – is a free notification service that lets your emergency contacts know if you do not check-in when you expected to.
- **Noonlight** – is a personal safety app for iOS and Android. If you are not feeling safe you can hold your thumb on a safety button which will notify local police with your location.
- **bSafe** – is a personal safety app designed to keep you and your colleagues safer. It contains features for both everyday safety and emergencies.
- **VithU** – with two simple clicks, you can let your emergency contacts know your current location.
- **Kitestring** – monitors where you are and sends a personalised alert message to your contacts if you do not check-in.



The GetHomeSafe app can be downloaded from the App Store or Google Play.

## C. INTERNAL RESOURCES

For assistance and guidance about safety on campus please refer to the Safer Community Program (SCP).

The SCP promotes a respectful, inclusive, and connected campus community that fosters safe learning, working and living at the University of Melbourne. The SCP provides the opportunity to seek support and advice about behaviours of concern.

They offer a number of services including:

- A safe place to talk about your concerns.
- Personal and tailored safety advice.
- Support and strategies to manage behaviours of concern.
- Referral information and assistance to access other internal and external support services.

### UNISAFE

For safety on campus staff may wish to download the official app of the SCP, UniSafe. Students, staff and visitors can use the app to request a security escort to or from campus, and can also access information about campus security services, health services such as counselling, disability liaison and international student support.

The app also includes tips on enhancing personal safety on campus, public transport, in cars, at home and 'out and about'. The UniSafe app is available for download via the App Store and Google Play.

### INTERNATIONAL TRAVEL

Staff who travel are advised to pick up a copy of the International Traveler's Handbook. Copies are available in the Advancement office, just ask a member of the Admin team or the Director, Operations.

When you travel overseas you will also be provided with a copy of the University's International Medical Security Assistance card. If you haven't received a copy of this card and your travel is imminent, please speak with a member of the Advancement Admin team.

## D. RELEVANT POLICY INFORMATION

The University's Appropriate Workplace Behaviour policy sets out the expectations for staff. Section 12.1 states:

An employee or student who considers they may have experienced one or more of the following incidents by an employee is encouraged to seek assistance at any time from the University:

- i. discrimination;**
- ii. harassment;**
- iii. sexual harassment;**
- iv. stalking;**
- v. bullying;**
- vi. vilification;**
- vii. victimisation.**

The above applies also when staff members feel that they have been subjected to any of these behaviours, from an external person who is involved with the University. Staff who have experienced this behaviour have the right to seek informal assistance or to make a formal complaint.

The process for making a formal complaint is set out in the above policy in Section 12.3. This the process within UoMA of seeking support and/or making an informal complaint is outlined in Section 5 of this document: Seeking Support.

### ADVANCEMENT LOCAL POLICIES

- Advancement has a Standard Operating Procedure in place in relation to Home Visits.  
This should be referred to when appropriate.
- Advancement has a Standard Operating Procedure in place in relation to International Travel.  
This should be referred to when appropriate.



## E. BUDDY SYSTEM

From 2019, trainees, new and less experienced Development Officers will be paired with a 'buddy', a more experienced professional who can provide tips and advice on managing external meetings.

It is recommended that this 'buddy' be assigned at the time of onboarding and work with the new staff member throughout the induction period.

On-going mentoring may be required for trainees and new and less experienced Development Officers.

The staff member should make this request through their manager.

## F. AWARENESS RAISING

### TRAINING FOR STAFF

The University's Safer Communities website contains information, tips and advice on:

- personal safety tips and
- personal safety checklist

Advancement will run a biannual practice leadership session with a focus on safe external meetings.

## G. EMERGENCY PROCEDURES

### AND ACTION PLANS

In the event that a staff member feels a situation has escalated beyond their control, they should immediately contact one of the following emergency numbers.

Campus security will involve other emergency services if required.

#### ON CAMPUS:

### Campus Security

T: 03 8344 6666

Available 24 hours a day, seven days a week

#### OFF CAMPUS:

### Victoria Police

T: 000

Available 24 hours a day, seven days a week

**If your situation is immediately life-threatening or urgent, always call [Victoria Police](#) on 000 first.**

## H. REPORTABLE GIFTS POLICY

The Appropriate Workplace Behaviour Policy sets out expectations for staff in regards to receiving gifts.

The policy states:

- 15.1. The University maintains a register of reportable gifts.
- 15.2. An employee may accept a gift of nominal value less than \$100 and retain that gift for their own use without reporting it.
- 15.3. An employee who receives a reportable gift must report the gift to their manager or supervisor within 14 days of receiving the gift.
- 15.4. A gift with a value of \$500 or more must also be reported to the Chief Financial Officer or delegate.
- 15.5. If the value of a gift is not apparent or the gift is of cultural or historical value, the University determines the appropriateness of accepting and reporting the gift.

The above should assist staff by providing them a basis on which to accept or politely decline any gifts offered to them.

## J. PRACTICE LEADERSHIP SESSION

This session is provided by experienced staff within Advancement twice per year. Details of the session are provided in the **ADVANTage Guide** for Advancement staff and in the Practice Leadership Program page both of which can be found on the Advancement Wiki.



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