

Workplace Personal Relationships Guidance

Objective

This guidance provides information and recommendations regarding the management of a personal relationship in the workplace.

Personal relationships in the workplace manifest in a variety of ways depending on the organizational roles of each person involved, the terms of the relationship, and the power dynamics that arise from GiveWell's organizational structure. For this reason, GiveWell has avoided crafting an over-prescriptive policy that would prevent management from assessing each case individually and holistically.

Personal relationships between staff members at GiveWell are allowable but strongly discouraged in cases of direct reporting structures. Employees are encouraged to use their best judgement and discretion managing their personal and professional relationships to ensure that the workplace remains collegial, respectful, and productive. Everyone is expected to act in the best interest of the organization and their colleagues.

This guidance is subordinate to and supportive of the [Personal Relationships Policy](#). If you have any questions about this guidance or the policy, reach out to the point of contact listed on the policy.

What constitutes a personal relationship?

A personal relationship is a relationship between individuals who have or have had a continuing relationship of a romantic, intimate, or sexual nature. GiveWell trusts employees to use common sense and their best judgment when assessing whether a relationship is continuing or not. In general, relationships will be considered continuous if the individuals in the relationship disclose the existence of the relationship to their social circles and/or if there is an agreed upon expectation of continuity between the individuals in the relationship. If the romantic, intimate, or sexual relationship is deemed continuous by the individuals in the relationship, then they should assume it constitutes a "personal relationship" according to GiveWell's policy and the individuals should act in accordance to the policy.

Notification

Notification is the individual act by both parties in a relationship, of alerting key GiveWell staff to the existence of a personal relationship. Currently, GiveWell requests notification of personal relationships be provided to the Chief Executive Officer and the senior HR official (currently the Head of HR and Business Operations). Notification allows the organization to take precautions that help maintain a professional and productive work environment. Most importantly, notification allows GiveWell to address concerns around conflict of interest, favoritism, exploitation, and bias with tact, timeliness, and a reasonable amount of confidentiality. Notification can also help avoid gossip or other behaviors harmful to the workplace environment that can arise when employees haphazardly become aware of a relationship between employees, even when employees try their best to keep a personal relationship secret.

When to notify?

GiveWell's primary interest in encouraging employees to disclose any personal relationship is to prevent a perceived or real conflict of interest from arising. Because it is sometimes hard to predict where a conflict of interest will arise, GiveWell recommends that all personal relationships be disclosed. For example, even relationships between coworkers of the same level can lead to a conflict of interest when they are in the same department or in the same project. Any instance where the team has to vote on a proposal made by an individual engaged in a personal relationship with someone else in the team could raise perceived conflicts of interest. Where there are clear and obvious potential conflicts of interest, such as relationships between any individual and his/her/their supervisor, budget and expense approvers, or those involved with performance review and promotion decisions, GiveWell requires that relationship to be disclosed in order to prevent difficult working situations. In such situations, GiveWell may alter staffing arrangements to eliminate this conflict. Where re-staffing is not possible, leadership will work with the individuals to minimize professional conflicts as much as possible.

Required notification situations

GiveWell requires personal relationships to be disclosed when one person has direct or indirect authority over the other person. Such authorities may include:

- Supervisory authority. Supervisory authority refers to the authorities exercised by a person over the employees they directly manage and oversee. Supervisors should do their best to avoid being in a relationship with a direct report. In the case that a relationship develops in a direct reporting line, GiveWell will reassign staff and supervision wherever possible and ensure additional oversight where not possible.
- Evaluative authority: Evaluative authority is exercised by anyone who participates in performance review, compensation, or promotion discussions, even if not the direct manager of the other person in the relationship. Relationships in which one party is in a position to evaluate the work or influence the career of the other may provide grounds for complaint by third parties if the relationship gives undue access or advantage, restricts opportunities, or simply creates a perception of these problems. Such relationships may also have unintended, adverse effects on the climate of a work unit, thereby impairing the working environment for others – both during such a relationship and after any break-up.

For the above reasons, and because relationships between supervisors and reports are often less consensual than the more senior individual or authority believes, relationships between a person with direct or indirect authority and anyone over whom they exercise such authority require disclosure and recusal.

How to notify?

Employees involved in a personal relationship in the workplace should each independently notify the CEO and the senior HR official (currently the Head of HR and Business Operations) of the relationship. Each employee is free to notify in whatever way they prefer (ie. email, Slack, in person). Once notified the senior HR official will schedule a meeting with each employee to discuss any possible conflicts of interest and potential remedies. Employees can expect these meetings to be as private as possible.

GiveWell understands that personal relationships are often private in nature and will treat such information sensitively and (to the extent practicable) confidentially.

In any situation when a recusal is required, the recusing party is obligated to notify their manager, in addition to the CEO, and the senior HR official. The recusing party must also recuse themselves from any supervisory or evaluative process of the other employee involved in the personal relationship. If there is no other reasonable manager with the technical knowledge to fulfill the recusing parties evaluative responsibilities, GiveWell will ensure that another party is responsible for reviewing the evaluation for objectivity.

Employees must submit their recusals in writing to their manager, the CEO, and the senior HR official whether or not they discussed the recusal verbally with any or all of the required point of contacts.

Recusing parties will work with their manager, and the senior HR official to determine additional or alternative evaluation processes.

Maintaining confidentiality of work information

Employees involved in a personal relationship must ensure that any confidential information they can/must access in order to perform their responsibilities at GiveWell remains confidential and is not shared with the other person in the relationship if that person does not have reciprocal access. Violating privacy and confidentiality expectations (e.g. the [Guide to Sensitive or Confidential Information Access](#)) could create an unhealthy work environment that diminishes transparency and productivity.

For example, a manager engaged in a personal relationship might find that direct reports begin withholding important information if they suspect and/or fear that their manager is sharing confidential information. Examples of types of confidential information include company, staff, donor, charity, and vendor information, as well as any information that other coworkers shared in confidence. In order to maintain a trusting environment, all individuals in a personal relationship must be discreet and thoughtful when sharing confidential information. When in doubt, employees should opt for not sharing or asking the appropriate third party for permission to share beforehand.

How Personal Relationships intersect with GiveWell's Sexual Harassment Policies

GiveWell will not tolerate sexual harassment under any circumstances.

Those employees who chose to engage in a personal relationship with work colleagues have a special responsibility to ensure that their behavior does not create a hostile or unpleasant work environment for any of their colleagues. This includes moderating physical, visual, auditory and other interactions while at work, including language choices. Remember that actions with which two people may be comfortable within the comfort and expectations of a relationship may not be comfortable to others.

GiveWell also recognizes that circumstances may change, and conduct that was previously welcome may become unwelcome. Even when both parties have consented at the outset to a sexual or romantic involvement, this past consent does not remove grounds for a charge based upon subsequent unwelcome conduct. If one party expresses the desire to end a personal relationship, or certain

behaviors within a personal relationship, continued pursuit by the other party of the relationship or the unwanted behaviors could subsequently constitute a violation of GiveWell's sexual harassment policies and would be followed up on accordingly.

Point Of Contact

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