

PALMERA

Organisational Policy

APRIL 2021, VERSION 1

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Introduction

Palmera Projects (**Palmera**) relies on the goodwill and commitment of its people. As a predominantly volunteer-based organisation, Palmera's staff and volunteers are encouraged to operate with a high level of flexibility. Palmera is committed to providing an inclusive, non-discriminatory, safe and positive environment for its people to contribute their skills and experience in a meaningful way towards Palmera's vision and mission.

Palmera expects all staff members to act professionally and respectfully at all times and adhere to any professional codes of conduct and behaviour that apply to Palmera.

Purpose

This Organisational Policy (this **Policy**) ensures that Palmera promotes the wellbeing of its people so that its human capital can continue to be its strongest and most effective asset. Palmera also recognises and respects the qualities which are unique to individuals such as gender, language, ethnicity, age, religion, disability and sexual orientation.

The purpose of this Policy is to ensure that all people have the right to participate and contribute to Palmera and its mission, and encourage diversity of thought, experience and perspective in a safe environment. It also provides a mechanism to raise a grievance in regards to discrimination, harassment, bullying or any other misconduct by a member of Palmera Staff without fear of retribution and ensure that such grievances are:

- appropriately investigated;
- that respondent receive fair and equitable treatment; and
- that disciplinary action is taken where appropriate.

Status of Policy

This Policy replaces previous versions of Palmera's Human Resources Policy (the **Prior Policy**). Any reference to the Prior Policy in any document, policy, guidance of Palmera or any agreement entered into by Palmera (including agreements with Palmera implementing partners) will be taken as a reference to this Policy.

Scope of Policy

This Policy applies to all Palmera Staff (as defined below) as well as Palmera in relation to its dealing with Palmera Staff and potential Palmera Staff.

Definitions and Terms

Term	Definition
Donor Field Visit	Any physical visit to the site of a Palmera Activity by a member of Palmera Staff or Palmera Supporter.
Palmera Activity	Any proposed or actual programme or project to which Palmera contributes funds.
Palmera Partner	Any implementing partner organisation engaged by Palmera in the delivery of a Palmera Activity.

Term	Definition
Palmera Staff	All employees, volunteers, contractors, consultants, officers and directors of Palmera.
Palmera Supporter	Any donor or supporter of Palmera who will participating in a Field Visit.
Partner Staff	All employees, volunteers, contractors, consultants, officers and directors of a Palmera Partner.

Inclusion and Diversity

Gender

Palmera believes that gender equality is a foundational human right, and as such, strives towards promoting and building a workplace that creates a culture that values, promotes, and benefits from gender diversity and equality. Palmera also ensures that it develops its Palmera Activities with a focus on gender equality and equal participation.

Disability

Palmera is a strong believer that all people can make a valued contribution to society. However, as a result of social, political and environmental factors, the rights and requirements of people with a disability are not acknowledged, and that they may also be passively or actively discriminated against and excluded from full and equitable participation in society.

Palmera aims to foster a culture which promotes, dignity, choice and self-control. Palmera's Social Inclusion Policy outlines Palmera's approach to disability inclusive development in Palmera Activities. Palmera also aims to create a workplace that recognises, and advocates for, the rights and needs of people with disability and ensuring their equal participation in society on an equal basis with others.

Cultural Diversity

Palmera welcomes, encourages and supports the inclusion of people from all cultural backgrounds, including Aboriginal and Torres Strait Islander people, and those from migrant and refugee backgrounds in all areas of the organisation.

Palmera provides a diverse, flexible and inclusive work environment which recognises, supports, encourages and values cultural diversity. Palmera is committed to strengthening its commitment to cultural inclusiveness, not only in the delivery of Palmera Activities, but also in its workplace. Fostering such a culture in a workplace will assist in the development and understandings into the diversity of all cultures, and improve the effectiveness and reach of Palmera Activities, thereby furthering Palmera's mission.

Palmera's Approach

Palmera will treat and value all of its Palmera Staff equally, regardless of their race, religion, disability, marital status, gender, sexuality, ethnicity or cultural identity. Palmera also strives to remove any and all barriers that prevents current and prospective Palmera Staff from equal treatment and participation in the organisation and its mission. In particular, Palmera will:

- make all efforts to recruit individuals whose values align with Palmera's;
- provide effective induction to all new Palmera Staff and training to ongoing Palmera Staff to ensure they understand Palmera's values, and its approach to diversity and inclusion, including by reference to this Policy and other Palmera policies;

- applying best practices for equal employment in respect of diversity and inclusion in all areas, including recruitment and selection, performance management, promotions, training and development, remuneration, leave entitlements (including parental leave and flexible working arrangements)
- developing strategies to respond to identified gender inequalities;
- ensuring all external communications, including media, marketing and fundraising, and Palmera's website, promote Palmera's commitment to diversity and inclusion in equal employment; and
- undertaking all recruitment and job selection decisions, including for volunteers, on a merit basis, whereby the skills and abilities of candidates are measured against the inherent requirements of the position and without regard to personal attributes.

Anti-Discrimination, Harassment and Bullying

Palmera is committed to providing a workplace free from unlawful discrimination, harassment and bullying.

This Policy is intended to supplement, but not replace, applicable laws and guidelines which relate to prohibiting discrimination, bullying and sexual harassment, including:

- Sex Discrimination Act 1984 (Cth)
- Racial Discrimination Act 1975 (Cth)
- Disability Discrimination Act 1992 (Cth)
- Age Discrimination Act 2004 (Cth)
- Australian Human Rights Commission Act 1986 (Cth)

Any member of Palmera Staff found to have engaged in discrimination, bullying or harassment might be counselled, warned or disciplined. Serious or repeated breaches can lead to formal discipline up to and including dismissal or termination.

Breaches of this Policy will be reported and resolved in accordance with the mechanisms outlined in Palmera's Complaints Handling and Whistleblowing Policy.

It should be noted, however, that legitimate comment and advice, including relevant negative feedback, from managers and supervisors on the work performance or work-related behaviour of an individual or group should not be confused with bullying, harassment or discrimination.

Discrimination

Discrimination can either be *direct* or *indirect*.

Direct discrimination occurs when a person is treated unfavourably because of a personal characteristic that is protected under applicable laws and regulations. Protected attributes include:

- Age
- Breastfeeding
- Career status

- Disability
- Employment
- Activity
- Gender identity
- Industrial activity
- Lawful sexual activity
- Marital status
- Parental status
- Physical features
- Political activity/belief
- Pregnancy
- Race
- Religious activity/belief
- Sex
- Sexual orientation
- Personal association with someone having any of these characteristics

Indirect discrimination occurs where a requirement, condition or practice appears to be neutral, but has, or is likely to have, a discriminatory impact on a person with one of the protected attributes listed above and is not reasonable in the circumstances.

No member of Palmera Staff shall discriminate against any other person or group of people. This prohibition on discrimination also applies during the recruitment process for potential Palmera Staff as well as when working with Palmera Partners or Partner Staff. Discrimination need not be calculated, intentional or even conscious.

Harassment

Harassment is any uninvited, unwelcomed or unreciprocated behaviour that offends, humiliates or embarrasses another person where a reasonable person would expect this to be the effect of the behaviour. It does not matter whether or not it was intended to humiliate, embarrass or offend the other person. Harassment on any basis is prohibited and may be against the law if it is associated with one or more of the grounds listed above (Discrimination). It can consist of bullying, disability harassment or racial or religious vilification. Harassment need not be repeated or continuous; a single incident can amount to harassment. However, reasonable management action, taken in a reasonable way in connection with a worker's employment, is not harassment.

Any form of harassment will be regarded as serious misconduct or misconduct and a breach of the employment contract which may result in disciplinary action.

Bullying

Bullying is behaviour that a reasonable person in the circumstances would expect to victimise, humiliate, undermine, threaten, degrade, offend or intimidate a person. Bullying can occur face-to-face, over the phone, via email, instant messaging or using mobile devices (including text messaging and social media platforms). Bullying can occur between workplace participants at all levels of the workplace. It may be direct or indirect, verbal or physical. It can involve public humiliation, usage of offensive language, or deliberate exclusion of a Palmera Staff member from work meetings, team catch-ups and / or social events without a legitimate reason.

Palmera does not tolerate bullying by any member of Palmera Staff to another or to a member of Partner Staff. At Palmera, it is also unacceptable to retaliate against someone because they propose to, have, or are believed to have made, a complaint of unacceptable behaviour under this Policy, other Palmera policies or relevant legislation.

Workplace violence

Workplace violence can take the form of harassment, bullying or discrimination, as noted above, but can also involve behaviour such as physical assault, aggressiveness, threatening or intimidating behaviour or other unacceptable behaviour. It can be physical or non-physical, oral, written or electronic, gestures or expressions that communicate a direct or indirect threat of harm. For the purposes of this Policy, Palmera considers any form of sexual abuse in the workplace or in connection with Palmera's operations, being the actual or threatened physical intrusion of a sexual nature (whether by force or under coercive conditions) as a form of workplace violence.

Palmera has a zero tolerance policy towards any such behaviour which it considers to be unacceptable. Certain forms of workplace violence by any Palmera Staff, such as assault or sexual abuse, may also constitute a crime and will be referred to the police or other agencies.

Recruitment and Training

Recruitment

As noted above, Palmera will endeavour to recruit Palmera Staff who's values align with those of Palmera's. Palmera will abide by the principles of inclusion and diversity and anti-discrimination as set out above in the recruitment process. In addition, Palmera must recruit Palmera Staff in accordance with the following principles:

FAIRNESS AND TRANSPARENCY

Palmera must be fair and transparent in its selection and appointment process. Clear job descriptions must be communicated to prospective candidates. All candidates must be assessed objectively against the criteria for the role. Palmera will provide feedback on the selection process to candidates if requested.

TALENT

Palmera aims to recruit the most suitably qualified and experienced candidates. It is insufficient to recruit candidates based on word of mouth or existing relationships. Palmera must obtain copies of candidates' resumes and outlines of relevant development, not-for-profit or fundraising experience.

RISK MANAGEMENT

Palmera will screen candidates for staff positions, including undertaking the following (if applicable):

- references should be obtained from at least two sources, one of whom must be a recent employer of the candidate;
- members of Palmera's network may be approached to provide feedback about the candidate;

- any candidates who are likely to be working with children or come into contact with beneficiaries or community members whom Palmera serves in any Palmera Activity must undergo a Criminal Record Check and Working with Children Check (or a local equivalent) in accordance with Palmera's Safeguarding Policy; and
- candidates will also be screened against terrorist listing as set out in Palmera's Anti-Terrorism Policy.

Training

INDUCTION

Upon commencement with Palmera, Palmera Staff must undergo an induction process that must guide them through:

- key organisational and operational policies, including this Policy, the Safeguarding Policy and Safeguarding Code of Conduct, the Anti-Terrorism Policy, the Anti-Fraud and Anti-Corruption Policy, the Complaints Handling and Whistleblowing Policy, the Conflict of Interest Policy and the Ethical Communications Policy;
- the Australian Council for International Development (**ACFID**) Code of Conduct;
- key background information and procedures relevant to their role; and
- the use of Google Drive and the file saving protocol.

ONGOING TRAINING

Throughout their time with Palmera, Palmera Staff are encouraged to develop their skills through:

- undergoing training and participating in courses or networking events specific to their roles (although these may not be funded by Palmera);
- sharing knowledge with the Palmera team through disseminating recent developments relevant to their roles; and
- shadowing a staff member in the senior role above theirs.

Palmera encourages the professional development of Palmera Staff through both informal and formal programs. Professional development can occur through mentoring (as noted above) or other informal means through leveraging Palmera's network, including one-on-one sessions for Palmera Staff to undertake with experts in their relevant area. This record of professional development is captured in a Professional Development Register.

Palmera also encourages (and will provide mechanisms for) both formal and informal refresher training on its key policies (including this Policy and the Code of Conduct) for Palmera Staff. These mechanisms may include completing online courses provided by not for profit, governmental or member organisations, through staff meetings or board meetings.

Performance management

Palmera undertakes an informal approach to the performance management of Palmera Staff. These include informal conversations between employees, consultants and volunteers with members of Palmera's management team, including the CEO. A person's performance is assessed against their role description, their contribution to Palmera's mission and their adherence and promotion of Palmera's values. In addition, Palmera Staff are also assessed for their adherence to Palmera's policies as well as the ACFID Code of Conduct.

Code of Conduct

Palmera Staff members are expected to adhere to the highest levels of conduct and professionalism in carrying out their duties for Palmera. All ongoing Palmera Staff are expected to sign the Organisational Code of Conduct (**Code of Conduct**) upon induction and adhere to the requirements set out in the Code of Conduct.

Any violations of the Code of Conduct will be dealt with in accordance with the grievance procedure set out below. Allegations of professional misconduct will also be notified to the appropriate professional organisation (if required).

Grievance Procedure

Palmera believes that open communication is essential in order to maintain good relations and to create an environment in which cooperation and trust are fostered. Palmera will aim to ensure that all Palmera Staff grievances and disputes are resolved fairly through open and honest discussions. All Palmera Staff are made aware of complaints procedures through familiarisation with the Complaints Handling and Whistleblowing Policy on induction.

Palmera aims to resolve all internal complaints, disputes, allegations of misconduct and grievances promptly and close to the source as possible. The following sets out the procedure to be followed to ensure that all Palmera Staff are treated fairly and consistently and grievances are resolved as expediently as possible:

1. Palmera Staff member raises the issue with the person directly involved (where appropriate)
2. Where it is not appropriate to raise the issue with the person directly involved or that course of action fails, the Palmera Staff member should discuss the grievance with the CEO or Chairperson of the Board
3. CEO or Chairperson of the Board thoroughly and objectively investigates the issue as soon as possible
4. CEO or Chairperson of the Board discusses findings and potential solutions with the staff member

Work Health and Safety

Palmera is committed to providing a safe and healthy workplace for all Palmera Staff as well as members, supporters and visitors participating in a in a Palmera Activity or Palmera event, meeting, project, overseas field visit or any other Palmera undertaking (a **Palmera Endeavour**). At the same time, Palmera Staff must acknowledge that they are aware of their individual responsibility to manage their own safety and well-being by taking reasonable care for their own safety at all times.

Overseas Field Visits

Before an overseas field visit (including Donor Field Visits), all Palmera Staff and Palmera Supporters must:

1. re-read certain Palmera policies including this Policy and certain other key policies of the organisation (including the Safeguarding Policy);
2. undergo a health check and obtain the necessary vaccinations and medication specific to the country of travel;
3. obtain and show proof of travel insurance to cover the period of travel;
4. obtain necessary visas and travel documentation for the entire period of their travel;
5. receive a briefing from Palmera as to risks relevant to their travel and the measures to put into place to mitigate those risks;
6. agree a communications plan with Palmera so that communication can be maintained consistently throughout the trip;
7. agree a security plan with evacuation procedures; and

8. Consult the government travel advisory at www.smartraveller.gov.au and register travel details.

During an overseas field visit, all Palmera Staff and Palmera Supporters must:

1. Ensure they abide by the Code of Conduct at all times;
2. Follow any reasonable instruction by Palmera relating to security;
3. Ensure that Palmera knows where you can be contacted at all times, especially in the event of any security risk or emergency;
4. Monitor and take account of the regular travel advisories issued by the Australian Government Department of Foreign Affairs and Trade and take local advice;
5. Exercise all reasonable caution when undertaking any activities that may result in harm or injury to you or others;
6. Take all reasonable precautions to protect their own property and that of Palmera (e.g., no valuables should be left unattended in local accommodation or vehicles and cash should be kept to a minimum); and
7. Report all incidents to the CEO and complete timely and detailed incident reports

On return from an overseas field visit, Palmera Staff and Palmera Supporters must have a debriefing session with Palmera so that any valuable experiences from the trip can be incorporated in planning future trips.

These procedures and requirements are usually set out in a briefing pack provided to staff and volunteers or members and supporters prior to their departure for a field visit.

Security

Palmera encourages security-conscious behaviour to ensure that all Palmera Staff, confidential documents of Palmera, equipment and personal belongings are secure. Palmera Staff are responsible for personal property and Palmera is not responsible for any loss staff or volunteers may suffer.

Injuries

Any Palmera Staff who sustains injury whilst undertaking a Palmera Endeavour must notify the CEO as soon as practicable of the injury and the circumstances that gave rise to it.

Palmera must notify either their public liability (if it maintains public liability insurance) or insurer or workers' compensation insurer (in the event an injury was sustained by an employee or contractor).

Insurance

For so long as Palmera retains employees, Palmera must maintain a Workers' Compensation Insurance Policy.

In accordance with workers' compensation insurance legislation, the Workers Compensation Insurance Policy shall cover all Palmera employees and certain contractors (who are deemed to be workers for the purposes of workers compensation legislation). However, volunteers will not be considered "workers" for the purpose of Palmera's Workers' Compensation Insurance Policy.

Palmera Staff members covered by Palmera's Workers Compensation Insurance Policy will be able to make a claim for any injury sustained during a Palmera Endeavour if their carrying out of employment duties during the Palmera Activity was "a substantial contributing factor to the injury".

The staff member may also be covered for any injury sustained in any journey to or from the Palmera Activity as long as the injury "is not attributable to the serious and willful misconduct of the worker".

Conflict of Interest

Palmera Staff who have other employment or voluntary positions should ensure that there is no conflict of interest between their positions. Palmera has a commitment to fostering ethical awareness, conduct and decision-making. Staff and volunteers need to be mindful that their actions and decisions are legal, consistent with Palmera policies and do not involve any actual or appearance of a conflict of interest.

Aside from any agreed remuneration, Palmera Staff may not make a financial gain as a result of working with Palmera. Palmera Staff must not grant favourable treatment to contractors or suppliers, or operate another business from Palmera resources.

All Palmera Staff are expected to comply with Palmera's Conflict of Interest Policy with respect to their engagement with Palmera.

Confidentiality and Copyright

Elements of Palmera's work are confidential or otherwise sensitive. Palmera Staff must keep confidential to Palmera any work, work product, access codes, information and communications. This also applies when Palmera works with other organisations that may have similar requirements. Confidential information regarding Palmera must not be retained physically or electronically in locations that are not secure. All electronic records must be protected with appropriate and approved security measures including passwords and access restrictions.

Palmera owns the copyright of all work and work products, and it remains with Palmera on termination of engagement. Palmera and its staff must also comply with the Copyright Act 1968.

Reviewing This Policy

This policy is to be reviewed every three years, or earlier if appropriate, and lessons learned incorporated into subsequent versions.

Date	Version	Review Description	Reviewed By	Approved By
April 2021	1	Original	N/A	Palmera CEO