

## TRUST, BUT CLARIFY MINI-DOCUMENTARY TRANSCRIPT

### Narrator

Trust is an important part of any relationship, including relationships between supervisors and co-workers. And while trust is important, it is also important to ask questions if you are being asked to do something and, either the reasons are unclear, or if what is being asked of you does not feel like the right thing to do. This is the situation in which Heather found herself.

### Heather

It was, I think, a Monday morning, and I was driving out into the suburbs to work and received a text from my boss asking if she could borrow my credit card and that her identity was stolen. I said, "Of course." It wasn't very uncommon for my team to maybe use her card or my associate to use my card for signing up for services that our team might need. So I figured it was kind of along those lines. I didn't really think much of it. I got my card back later in the week.

I was at one of my best friends' wedding shower and received another text message from my boss asking again, "I might need to use your credit card again, where are you, can I come get it?" And so I thought that was a little bit out of ordinary, but didn't really know how to say no. She ended up coming to meet me at where I was to borrow my card again.

It definitely was weird. It definitely felt a little strange, but I just felt very uncomfortable with asking why she was using my credit card.

I felt uncomfortable because she was my boss; she was my mentor. She was someone I trusted. And I think I just wasn't sure how to question her.

So, Monday I got an email saying that you have new expenses to review. I logged into our system and noticed the charges that had been placed the prior week and those charges were definitely not company related. They were, you know, 900 dollars, which is a lot I think if you're not traveling or going on a trip. And so [it] just raised a lot of red flags with her purpose for using my card obviously. It wasn't work related, which I kind of figured it was. She led me to believe that.

And that's kind of when it started to ring a bell that things were definitely off.

### Narrator

Although Heather's company allowed employees to, at times, use their company card for personal charges, Heather began to feel concerned about why her boss would borrow her card for a use that was exclusively personal and not at all work related.

### Heather

I sent her messages, text messages, to ask her how I was going to expense it. Initially, she said you'll expense it and she'll work it out with finance. She kind of changed things and said that the way you process it will be different — you'll check it as personal, and then she'll just pay me. And so that's the moment when I kind of

took a step back and said, “Wait, so these are going to come out of *my* paycheck and then you’re going to write me a personal check?” It started to get kind of confusing and worrisome.

So then she was off work on a personal vacation with my credit card. And the following Monday those charges came and those charges were even more alarming because they were related to the vacation — resort fee and rental car. The amounts were even higher and at that point I didn’t even feel comfortable asking her. I didn’t know how to handle it.

So I started to talk to some mentors in my old role that kind of shed light on the severity of the situation. If I do submit [the charges] as personal charges and go along with it, that I could be colluding with her. That is not a good place to be in, so I was encouraged to report it.

After I realized the severity of the situation, the amount of the charges, and that I was essentially involved, I think that’s when I started getting scared. You know, feeling guilty. I felt a lot of guilt because I didn’t ask enough questions like, “Why — why do you need my company card?” So many things were going through my head, but I just was almost too scared to ask for maybe — confrontation — or just questioning your boss in a light that, you know, you’re kind of opening up their...flaws in a way or personal financial issues potentially.

So, it was just kind of that feeling of, “Why did I give her my card again, did I put myself in this position?” Or...just a lot of doubt and confusion. Trying to always be the optimist and people pleaser and it was just — I was stuck in this really tough spot between someone that I thought I could go to and trust and then at the other end of it, it was someone that had manipulated me.

It was really tough. I didn’t really know what to do exactly. It took me a couple of days to really digest the whole situation. I finally met with another prior boss who, as soon as he started hearing me explain the story, he was very concerned and ended up meeting with our legal department. That’s when it became an investigation.

#### **Narrator**

Heather’s company performed a thorough and confidential investigation of the credit card charges. During the investigation, Heather was asked to provide printouts of her text message exchanges with her boss showing the requests to use her credit card.

#### **Heather**

I definitely felt like I was betraying her; part of me feels bad for her because of that. But ultimately, the other side of that, is me going against myself, and that’s not something that I can live with.

#### **Narrator**

The investigation concluded that Heather’s boss had violated company policy and misused her authority. The individual was terminated.

Heather believes that her company handled the sensitivity and confidentiality of the situation well, and that she was supported throughout the process. She has this lesson to share with others.

**Heather**

If you come across something — if you're involved in a situation that doesn't feel right, trust that feeling. And don't try to undermine it. What I found helpful was when I talked with friends, my fiancé, that kind of really put it into perspective as to what could actually be going on. And, what are the underlying issues...what could happen in the future if this were to continue. When you're in a weird situation, you kind of are focusing on that present moment. What really helped was when I would explain it to other people not involved in this situation. Hearing their reactions...made me not justify it.