

Washington Center
Equitable Growth

To: Claudia Sahn
From: Amanda Fischer
Date: August 13, 2020
Subject: Notice of Performance Improvement Plan (PIP)

During the few past months, it has become increasingly evident that you have not been performing your assigned work in accordance with what is expected of your position as Director, Macroeconomic Policy. You have been verbally counseled on this unacceptable performance in numerous check-ins, beginning in March through July 2020. To date, you have not demonstrated improvement in response to these concerns. The Washington Center for Equitable Growth (Equitable Growth) values you as an employee, Claudia, and it is our intent to make you fully aware of this situation and assist you in improving your work performance. The responsibility to improve, however, is yours alone.

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You are being placed on a written Performance Improvement Plan (PIP) to correct the problems, prevent recurrence, and prepare you to succeed at Equitable Growth in the future. Although employment with Equitable Growth is based on mutual consent, and both you and Equitable Growth have the right to terminate employment at will, with or without cause or advance notice,

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This PIP is intended to facilitate a constructive discussion between you and Equitable Growth to clarify work performance to be improved.

For the next 30 days, August 13, 2020 to September 12, 2020, you must demonstrate immediate and marked improvement in the following two areas:

1. Professional conduct:
 - a. Communicate with internal and external stakeholders with respect in all of your verbal and written communications, and endeavor to receive supervisor feedback in ways that are productive. As supervisor and employee, you and I need to be able to engage in constructive dialogue where feedback is received, reflected upon, and we both move forward with a mutually agreed-upon solution. We have to be able to dialogue, both be given the opportunity to speak, and have our conversations be free from volatility. In our conversations, this respectful

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processing of feedback has not been commensurate with the expectations at Equitable Growth. For example:

- i. On July 30, 2020 at 1:25 PM, I called you to check in about your recent personal blog post. I started the conversation by stipulating that you were free to publish whatever you like on your personal blog; I said this conversation was not meant to be acrimonious and that I didn't want to take up too much of your time. I also expressed that the blog had created substantial amounts of work for your colleagues, especially for the Communications Team, who received many press requests on your behalf in your capacity as an Equitable Growth employee and had to adjust their work plans and devise a communications strategy without warning. I also expressed that it would be helpful to know when such blogs were going to be published in the future, given other organizational priorities at Equitable Growth, like Congressional testimony and funder meetings, which also demand significant amounts of staff time. Because the blog was sent to others in the organization and me as a private and "not urgent" communication, staff did not have sufficient time to read the blog and be prepared to answer questions from the media. I also expressed that I understood the toxic environment in the field of economics, supported your feelings of stress and frustration, and offered my own perspective on

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- ii. This most recent circular resignation example is in addition to previous voluntary separation overtures that you'd be leaving Equitable Growth, including on March 21, 2020 and July 24, 2020. In the most recent example, I followed up the phone call with an email reiterating our discussion, saying that you were not being terminated, that we supported your writing and are also trying to make the economics

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- ii. This most recent circular resignation example is in addition to previous voluntary separation overtures that you'd be leaving Equitable Growth, including on March 21, 2020 and July 24, 2020. In the most recent example, I followed up the phone call with an email reiterating our discussion, saying that you were not being terminated, that we supported your writing and are also trying to make the economics profession more inclusive, and that we merely wanted better communication on blog posts that reflect your writing in a hybrid personal/professional capacity. In your response to my email, you did

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not acknowledge my comments, you said you did not want to work at an organization that "saw you as a downside risk," and you reiterated the other places where you'd like to be employed. I responded to that email by reiterating my original points. You sent additional emails on separate chains to others on the team in the coming hours and days.

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not acknowledge my comments, you said you did not want to work at an organization that "saw you as a downside risk," and you reiterated the other places where you'd like to be employed. I responded to that email by reiterating my original points. You sent additional emails on separate chains to others on the team in the coming hours and days apologizing, and then retracting your apology with criticisms of the team, and then apologizing again.

Such a volatile style of communication does not serve our team or the organization well. Feedback should be respectfully given and received, and communications should not escalate in this manner in the future. Any threats or references to quitting your employment with the organization in the future will be considered an official resignation of your position, with a final date of employment not to exceed 30 days after the statement of intention or desire to quit.

- b. As an employee and leader in the organization, you need to be able to follow instructions related to your job respectfully when asked to do so by your supervisor and you need to be mindful and attentive to the imperative to set a good example as a supervisor yourself. For example:

- i. After the Supervisors DEI meeting on July 15, 2020, I called you to discuss

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team, and then apologizing again.

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 - i. After the Supervisors DEI meeting on July 15, 2020, I called you to discuss the meeting. You opened the call by saying, "If you're going to criticize me, I'm not going to take this call right now." I responded by gently asking you not to bring the Policy Analyst to supervisors' meetings, because other employees in their position were not invited to attend and it created equity issues. You noted that you did not look at the meeting invitation or what it was, but instead reflexively forwarded to the Policy Analyst. I asked you to be more attentive moving forward.
 - ii. Subsequently, on July 23, 2020, you invited the Policy Analyst to the Program Leads' coffee with the CEO. This was a longstanding meeting whose invitation list has been clear. I sent an email on July 24, 2020 again gently and respectfully reminding you that you should be mindful of attendee lists on meetings. You replied by saying it was "not [your] fault

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- c. As a leader in the organization, your engagements with the Communications Team should be respectful of their feedback and their processes. The Communication Team frequently has to reemphasize the need to check in with them before replying to members of the media (e.g., John Oliver producer email; DMs and

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texts from reporters, etc.). Feedback from the Communications Team is often met with resistance and rebuttal. For example:

- i. When the Communications team on May 6, 2020 requested that you not to use the term "blacks" to refer to Black people, Black Americans or African Americans, you rebutted their Communications advice.
- ii. On May 20, 2020, when the Communications Team attempted to give you feedback on your Lecture Series presentation, you left the call early because you said their feedback was "very hard to hear." Moving forward, all engagements with the Communications Team should be met with respectful engagement.

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- d. Furthermore, your role as a leader in the organization is called upon to respond and support Equitable Growth's Diversity, Equity, and Inclusion (DEI) Objectives and Key Results (OKRs). For example:
 - i. On July 23, 2020 during a DEI OKR All Staff Meeting, in a breakout room that I was managing, employee attendees were discussing how to improve Equitable Growth's hiring processes to be more inclusive. You commented that "if you had to hire a Black or a woman or a gay or a lesbian, just tell [you] and [you'll] do it." The impact of that statement to the others was that you, as a leader, did not want to follow the outreach and screening processes of the institution and that you just wanted to be "told" to hire a minority. You expressed to the group that the Policy Director forced you to do additional phone screenings of more diverse Policy Analyst candidates that met the minimum job criteria, after you curated your original set of candidates. You implied that expanding the phone screening outreach in the service of DEI was an inconvenience that you did not want to undertake. This was an inappropriate comment that gave the wrong impression that DEI was not an important hiring goal for Equitable Growth. It also implied disrespect to the Policy Analyst who was ultimately hired from that expanded set of candidates. The Policy Director contemporaneously had to give you feedback that these comments were inappropriate.
- e. You may not consume alcoholic beverages during working hours or create

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- e. You may not consume alcoholic beverages during working hours or create the appearance on social media that you are consuming alcohol or drugs on social media postings that appear to be made during office hours in which you should be working for Equitable Growth. Equitable Growth's desire is to provide a drug-free, healthful, and safe workplace. To promote this goal, employees are required to report to work in appropriate mental and physical condition to perform their jobs in a satisfactory manner. Therefore, the organization's Drug and Alcohol Use

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policy states "limited consumption of alcohol is permitted on and off the premises during official work-related celebrations." For example:

- i. On May 18, 2020, you tweeted an alcoholic beverage during the workday as one you were consuming real-time, which elicited a response from an Equitable Growth staff member at 2:25 PM: "What I really wanna know is how was that pineapple mimosa? I'm all here for Mimosa Mondays!" On

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- i. On May 18, 2020, you tweeted an alcoholic beverage during the workday as one you were consuming real-time, which elicited a response from an Equitable Growth staff member at 2:25 PM: "What I really wanna know is how was that pineapple mimosa? I'm all here for Mimosa Mondays!" On July 9, 2020, you consumed an alcoholic beverage during our check-in meeting.
- f. Utilizing your Equitable Growth affiliation in personal communication and on social media is not permitted. One specific aspect of the job description for the position that you hold at Equitable Growth is that you represent Equitable Growth to the media, policymakers, and other external stakeholders. Therefore, in any communications that include any references to your title, position or information, the media, policymakers, and other policy holders often assume that you are speaking on behalf of Equitable Growth when you use your title, unless explicitly told otherwise that your communication is of a personal nature only. For example:
 - i. On July 12, 2020, you sent an email to Janet Yellen, Ben Bernanke, and Peter Rousseau about your personal concerns and signed it with your Equitable Growth credentials. Please do not use Equitable Growth collateral in unapproved personal communications with others, i.e., your title, our name or logo, etc. Please review and adhere to the guidelines set forth in the Equitable Growth Social Media Guidelines.

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- i. On July 12, 2020, you sent an email to Janet Yellen, Ben Bernanke, and Peter Rousseau about your personal concerns and signed it with your Equitable Growth credentials. Please do not use Equitable Growth collateral in unapproved personal communications with others, i.e., your title, our name or logo, etc. Please review and adhere to the guidelines set forth in the Equitable Growth Policy on Social Media.

2. Deadline adherence:

- a. Please manage deadlines to fully complete your assigned work. As Director of Macroeconomic Policy, you are responsible for not just promoting your own work to the press and via social media but completing organizational priority tasks pursuant to the guidance of the Policy Director. Frequently, deadlines on these tasks have not been met. For example:

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 - i. OKR updates for Q1 and Q2 2020 were both completed after the deadlines set by the Senior Associate and reiterated by the Policy Director.
 - ii. You recently indicated to the Policy Director that you had not done any time-sensitive Salesforce entries since March 2020.
 - iii. Work in support of Academic Programs, e.g., editing Expert Focus or providing LOI feedback, is often submitted past deadline.

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- iv. On June 2, 2020, you missed a meeting with Policy Director and a representative to discuss the hiring process and did not communicate a reason for missing the meeting. The Policy Director needed to affirmatively contact you and the HR representative needed to proactively reschedule the meeting.
- v. Recently, on July 30, 2020, you missed a deadline for convention material submission. The Policy Director had to email a reminder the next day and ask for it again. While the work was overdue, you tweeted dozens of tweets about personal matters during the immediate time period before the deadline.

You should work with the Policy Director to communicate when due dates are missed. The Policy Director and Communications Team often provide feedback that media engagement should be scaled back to accommodate organizational needs. In the future, you should work with the Policy Director to manage your various responsibilities and not privilege media and social media engagements over other priorities.

- b. Improve communication and management of work planned and performed with your team with organized communication and updates. You should tie your work and organizational objectives and key results to your supervisee's requirements. Their new employee orientation and onboarding needs have been provided.

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- b. Improve communication and management of work planned and performed with your team with organized communication and updates. You should tie all your and organizational objectives and key results to your supervisee's required results. Their new employee orientation and onboarding needs have been provided to you and should remain a priority in the short term. As a manager, you are charged with owning four keys to our success with your staff: 1. Building an Exceptional Team; 2. Setting vision and goals; 3. Managing execution; and, 4. Being an organizational leader. Just as Equitable Growth has goals not only around specific results it aims to achieve, but also around ensuring that those results are sustainable in the long term, so should supervisors. So, in addition to goals that represent the most important results one's team is working toward, you should develop OKRs around the management of your team.

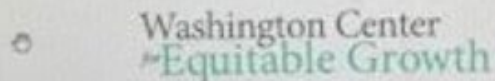
Claudia, I will review your progress on each of the above items requiring improvement next week on Mondays at 3:00 PM.

Improvement must begin immediately and be maintained. If any objective of this Performance Improvement Plan is not met at any time during the specified time frame, Equitable Growth may terminate employment. A decrease in performance after successfully completing an improvement plan may also result in dismissal from Equitable Growth without the issuance of another warning or improvement plan. This PIP does not change the nature of your employment. Equitable Growth, as an employer at-will, is not a contract between you and Equitable Growth, and does not

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In no way, promise or guarantee your continued employment at Equitable Growth. This plan is designed to help you succeed in your position as Director, Macroeconomic Policy.

I am available to discuss any issues or concerns you may have, as you work through this plan.

Your e-signature below acknowledges this discussion. It does not indicate agreement or disagreement with this plan.

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Supervisor Signature

Date

Employee Signature

Date

Director of Talent Signature

Date