



CONFIDENTIAL MEMORANDUM

DATE: July 21, 2015
TO: Neera Tanden and Carmel Martin
FROM: Ashley Marvel and Torey Carter
RE: WCEG Performance Management

Staff Departures Implicating Heather's Management

Jeremy Smith – Managing Director, WCEG

Presented with a Separation Agreement in February, 2014, approximately 60 days after starting. CAP paid \$20K in severance. Carmel reports that Jeremy met with Joe Smolskis, Winnie, and Carmel and reported that Heather was extremely difficult to work with. He alleged that she did not provide clear direction and was erratic in her interactions with Jeremy. Heather reported that Jeremy was not a good fit for the position, and that he needed a tremendous amount of direction and supervision for someone at his level. Heather asked Denelle to initiate a separation. Carmel and Joe spoke with Jeremy to ascertain whether an alternative course was possible. Jeremy voluntarily sought a severance package in exchange for resignation. Debbie indicated to us verbally that Heather's management style was a factor in Jeremy's decision to resign.

Enjoli Timmons – Program Coordinator, WCEG

Resigned in April, 2015 after slightly more than 6 months. CAP offered to pay for 2 months of COBRA.

Enjoli approached us in March, 2015 about her frustrations working for Heather. We advised her that we would work with her and Heather to try to improve the relationship. Enjoli requested that her primary responsibilities be assigned to someone else so that she did not have to interact with Heather. We advised her that we could not change her primary job responsibilities. However, she was advised that she was welcome to apply for any open positions. She did not allege any discriminatory treatment or disclose any health issues at that time.

Enjoli resigned verbally and via email on March 11. On the same day she resigned, Enjoli met with us to determine her final day. She wanted to stay and complete a project. We advised her that was not necessary and that she should pick a day that worked for her and her supervisor. She advised us later that day that she and Ed had settled on April 3.

Subsequent to the above meeting, Enjoli requested to meet with Debbie Fine and Torey Carter. At that meeting, she disclosed that she had ongoing health issues and wanted to extend her final day. At a follow-up meeting, Torey and Debbie reiterated that her resignation was final and that April 3 should be her final day, but that to make her transition easier CAP would offer to pay COBRA for May and June.

Enjoli stated in exit interview that she was resigning only because Heather was impossible to work for/with and that working under her was stressful and volatile with frequent episodes of yelling and swearing. Also indicated that Heather was condescending and had denigrated Enjoli's educational achievements and that Heather was "good at putting you in your place." She also, for the first time, indicated that a co-worker, Kavya Vaghul, felt that Heather and Ed were racist and that another co-worker, Bridget Ansel had told Kavya that "she (Kavya) was treated differently because of her race."* Enjoli emphasized on three separate occasions in that interview that she did not believe Heather or Ed to be racist, that she did not think Heather or Ed treated Kavya (or anyone) differently based on race, and that she herself had not received or experienced any discriminatory actions or behavior.

We believe Enjoli was not the right person for this position. The job description as written and the job description as presented by Heather and Ed were two separate functions. Enjoli was never clear on her expectations.

*We requested interviews with both Bridget Ansel and Kavya Vaghul. We met with them separately on April 29. They were each asked directly if they had experienced, or witnessed, discriminatory behavior or had previously indicated to others that they had experienced discriminatory behavior. Each of them answered emphatically that they had not experienced or witnessed such behavior. Both individuals were reminded of CAP's anti-discrimination policies and were encouraged to report any such behavior.

Carter Price – Senior Mathematician, WCEG

Resigned in April, 2015 after 17 months. Heather acknowledged in November, 2014 that she had not hired the person the team needed, and she began the process of trying to move him out. There were several discussions about moving him to a different team but he resigned before any final decisions were made.

Carter stated in his exit interview that Heather is "phenomenally incompetent as a manager" "worst manager ever" "she cannot prioritize" and that she "has constructed artificial bureaucratic hurdles that make it impossible for researchers to function." He also stated that many of the staff are looking for other positions. Carter also alleged that the hiring of John Schmitt was completely outside the normal process and ignored highly qualified and diverse staff to bring on Heather's friend. This was not what was described to us during the hiring process for this position. These disclosures were reviewed with legal and the decision was made to ask Heather's coach at The Management Center to address these issues..

Sallie (Kate) Crawford – WCEG Grants Manager

Resigned March 14, 2014, after 10 months – indicated on her Personnel Action Form that job was "not a good fit." Only performance review (by HB) indicates Exceeds Expectations in every category except Dependability (Successful) and Initiative (Outstanding). Debbie indicated to us verbally that Heather's management style was a factor in this resignation.

Sarah Miller – VP for Communications, WCEG

Resigned March 14, 2014, after 15 months. Only performance review (by JDP) indicates Outstanding or Exceeds Expectations in every category except Job Knowledge (Successful). Debbie indicated to us verbally that Heather’s management style was a factor in this resignation.

Steps Taken

Given that Heather and several of the employees discussed above have indicated that there was a bad fit between positions and employees hired, we have asked Heather and Ed to work more closely with HR when hiring. Moving forward, we will review job descriptions and make hiring suggestions. We will work with WCEG to ensure there is alignment between the actual job description and what is described to the candidates during the interview process.

Given the allegations that Heather has difficulty managing staff, appropriately communicating her expectations, and is unprofessional in her conduct, we have worked with Heather to create a relationship with the Management Center to provide her with training and professional development. We spoke with her coach after these most recent incidents and he said she certainly has a distinct management style that they were working to shift but that he would also focus on recruitment in the coming sessions. We have also asked both Heather and Ed to work more closely with HR when personnel issues arise.