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 In the matter of: *
 *
 D.N.R. Anonymous Complaint *
 Investigation *
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OFFICIAL

REPORT
AND
RECOMMENDATION

Before: JULIAN, Chairperson, SERPE, STEININGER, WILSON and DEWITT, Board Members.

This is an anonymous request for investigation submitted by a writer who states that he or she is a secretary employed at the Department of Natural Resources. The writer alleges in a letter, a copy of which is attached, that certain D.N.R. secretaries were threatened with denial of merit increases if they did not withdraw their objections to a scheduled agency training session at Stevens Point. A copy of their memo or petition is attached. Following receipt of this letter we asked the agency to review the complaint and submit its findings in writing. A copy of the agency's report is attached.

The report indicates that agency representatives interviewed the secretaries who signed the petition. Three of the secretaries interviewed felt their supervisors who originally spoke to them for the purpose, according to the agency, of finding out why they felt the training session should be rescheduled, made "comments or questions . . . detrimental to their interests." After having been interviewed at further length by a D.N.R. attorney, the agency concluded, as we interpret its report, that there was a conflict in testimony:

The interviews conducted by Attorney Schwarz reveal that some of the subject matter noted in the anonymous letter was discussed with three of the employes. There is no agreement whatsoever by the women supervisors and these three interviewed women as to whether any threats or challenges were made pertaining to merit increases, promotions, probationary actions or filing negative material in the employe personnel file.
Report, p. 2.

In other words, it is apparent that there were "three women who alleged that their status had been threatened or challenged," Report p. 2, but the supervisors involved deny these allegations.

The agency also reported that there were no entries in the secretaries' personnel files with regard to these incidents. The agency's conclusions are as follows:

1. The subject matter of merit increases, promotions, and career advancement was discussed in a number of interviews with women employees scheduled for training, however we are unable to find any evidence of intent to harm an employee's status.
2. Faulty communication, all oral, between the women supervisors and the women scheduled for training appears to be the prime source of irritation to three employees of the 20 petition signers.
3. No disciplinary action appears indicated by the actions of either supervisors or women scheduled for training.
4. A need for training in both communications and supervision is strongly indicated and the experiences of this review will be beneficial in improving our training sessions.

In its report the agency indicated that the reason the supervisors had been requested to meet with the petition signers in the first place was to "ascertain why they felt the session should be rescheduled for Madison." After reviewing the conflict in testimony about exactly what happened, the agency commented "It appears injudicious to have discussed certain items without better planning."

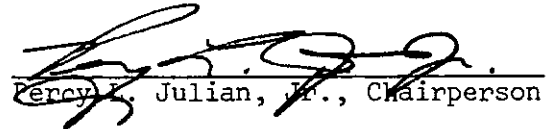
We find this situation alarming. The petition or memo in question stated in some detail the reasons for the request to have the session rescheduled. Regardless of the intent at this point, to call each of the signers in to discuss, ostensibly, the reasons why they felt the session should be rescheduled, and then in a "number" of these interviews to discuss "merit increases, promotions, and career advancement," is bound to act as a deterrent to the expression of opinion by all employees who were involved or even aware of this. We recommend that the agency take steps, if it has not already done so, to ensure that supervisors receive instruction in the First Amendment rights of employees and that this type of situation does not recur.

D.N.R. Anonymous Complaint Investigation

There is no indication that any action was taken against any of the petition signers nor that any entries were made in their personnel files. Further, we have not received any further communications from anyone who was allegedly aggrieved in this matter beyond the original anonymous letter. In light of these considerations we will not take any further action in this matter at this time. However, we will forward copies of this report and recommendation with attachments to each employe whose name appeared on the petition or memo. If any of them feels further action is appropriate he or she may request that the matter be reopened.

Dated February 23, 1976.

STATE PERSONNEL BOARD


Percy A. Julian, Jr., Chairperson



State of Wisconsin \ DEPARTMENT OF NATURAL RESOURCES

L. P. Voigt
Secretary

BOX 450
MADISON, WISCONSIN 53701

IN REPLY REFER TO: 8250

Atty. Percy L. Julian Jr.
Chairman, State Personnel Board
330 E. Wilson st.
Madison, WI 53703

RECEIVED

APR 10 1970

LAW OFFICE OF

Dear Mr. Julian:

I am one of the secretaries at DNR and am hoping that some state authority will please do something about this incident. An employe should not be threatened or intimidated for doing her job.

No matter what Mr. Beale or Mr. Voigt say, threats were made and they knew about it. As the newspaper says, they only called off the training session the day before it was supposed to take place because Senator McKenna found out about it.

The secretaries who signed the memo I have enclosed were told they would not be given any merit increase in July if they did not withdraw their objection to the Stevens Point training session.

They were told a permanent record of the way they behaved in this matter would be placed in their personnel file.

They were told it would effect any chance they had for future promotion.

At least one girl who had been promoted and who was still serving her six month probation was told her promotion might not be approved.

All of the threats were made in individual interviews. After the interviews three of the secretaries were so scared that they asked that their names be taken off the memo.

Only the girls in the secretarial classification were treated this way. The other ones in the higher level professional bracket were not. DNR will no doubt get even with them some other way.

I would like to sign this letter but am afraid if I did so steps would be taken to make me sorry I ever complained. It has often happened to many employes all over DNR and is not just limited to secretaries.

Even so, I trust that some authority will investigate and put an end to this kind of thing. I am sure that all the girls will cooperate if they can stop such things in the future and if they are guaranteed no steps will be taken against them.

Very Truly Yours,

A public Servant Who Believes in Fair Treatment

cc: Harold Jordahl
Mrs. G. L. McCormick
Whitney Gould

Department of Natural Resources

INTRA-DEPARTMENT

MEMORANDUM

.....Madison.....
Station

Date February 26, 1975.....

IN REPLY REFER TO: 8250

To: John Beale.

From: Carolyn Johnson, Virginia Stricker, Gloria McCutcheon, Kathy McCormick, Janet Beecher, Linda Bornstein, Linda Kosnik, Sue LaCourt, Janna Metcalf, Wendy Magadan, Pat Sanden, Lynn Stephenson, Nancy Conway, Rose Smith, Karen Bohun, Buck A. Wagner, Ruby A. Braun, Donna Turk, Stephani Klosterman, Dawn Sedik

Subject: Women in Management Training

We are surprised that this training session is being held in Stevens Point when 35 of the 43 women are coming from Madison. In addition to the personal inconvenience caused to the majority of women involved, there are two other important issues - austerity and energy conservation.

In a time of austerity budgets, it seems illogical to spend a minimum of \$400 extra in mileage, lodging and meal expenses to hold the meeting in Stevens Point rather than in Madison.

Furthermore, it seems wasteful of energy to require us all to travel to Stevens Point. Even if there were four people per car traveling from Madison, the total mileage traveled to Stevens Point would be greater than the mileage traveled if the meeting were held in Madison (1688 miles if held in Stevens Point, 1010 miles if held in Madison). If we make the more probable assumption that an average of only two people will ride together, the difference is even greater (2651 miles versus 1010).

Therefore, in light of the Governor's directions on energy use and the current austerity budget, we request that the training session be rescheduled for Madison.

cc: Charles Kieck
Rudy Teschan
William Matson
Donald Mackie



State of Wisconsin PERSONNEL BOARD
STATE OF WISCONSIN DEPARTMENT OF NATURAL RESOURCES
MADISON

L. P. Voigt
Secretary

June 18, 1975 JUN 19 PM 1 18

BOX 450
MADISON, WISCONSIN 53701

IN REPLY REFER TO: 9150

Mr. Percy L. Julian, Jr., Chairperson
State Personnel Board
One West Wilson Street
Madison, Wisconsin 53702

Dear Mr. Julian:

Chairman Harold C. Jordahl, Jr., of the Natural Resources Board, has directed that I investigate and report on your request of an anonymous letter you received pertaining to a planned Department of Natural Resources training program on women in management and affirmative action. The attached report summarizes our review, the background information associated with the training program, and our observations and findings.

The DNR believes we have made a comprehensive review of all data that can be verified and have given all parties concerned ample opportunity to discuss and support their views. We consider the matter closed but stand ready to provide any data within our capacity to the State Personnel Board in the event that they should want a further review.

Sincerely,
Division of Services

William A. Matson
Administrator

WAM:mg
Attach.

cc: Harold C. Jordahl, Jr.

INVESTIGATION OF ANONYMOUS COMPLAINT DIRECTED TO PERCY L. JULIAN, JR., CHAIRMAN,
STATE PERSONNEL BOARD, RELATING TO A
PLANNED WOMEN IN MANAGEMENT TRAINING PROGRAM

MARCH 11 AND 12, 1975

Investigation Conducted By:

Charles Rieck, DNR Training Officer
Rudy Teschan, Assistant DNR Training Officer
David Schwarz, DNR Hearing Examiner
William Matson, Administrator, Division of Services

Communications Reviewed:

Petition dated February 26, 1975, from 20 technical and office services employes addressed to John Beale.

Undated anonymous letter addressed to Percy L. Julian, Jr., Chairman, State Personnel Board.

Letter of April 22, 1975, from Percy L. Julian, Jr., to Harold C. Jordahl, Jr., Chairman, Natural Resources Board.

Letter of May 14, 1975, from Harold C. Jordahl, Jr., to Percy L. Julian, Jr.

Background:

During the past 24 months the Department of Natural Resources has conducted four women in management training programs (phase 1) for groups of approximately 50 Department employes and small groups of similar employes from other departments of State government. The two-day training sessions have been held at Stevens Point to provide a central location for all participants and a facility where interruptions would be minimal. The location had been exceptionally suited to training programs for men and had earlier been requested as equal accommodations for women.

On February 26, 1975, John Beale received a petition with the names of 20 women employes asking that the training session be rescheduled for Madison recognizing as justification personal inconvenience, austerity and energy conservation.

On March 10, all employes previously invited to the training session were advised that the session was cancelled and would be rescheduled later.

On April 7, Chairman Jordahl received a copy of the anonymous complaint addressed to Chairman Julian. Later, on April 22, Chairman Jordahl received a letter direction from Chairman Julian directing that the complaint be reviewed and a report made to the State Personnel Board.

Chairman Jordahl directed the DNR to review the anonymous complaint and prepare a response for the Personnel Board.

Upon receipt of the petition of February 26 asking that the training session be rescheduled for Madison, the various supervisors of these women were asked to review with them and ascertain why they felt the session should be rescheduled for

Madison. Statements or understandings emanating from those discussions appear to be the substance referred to in the anonymous letter directed to Chairman Julian.

Review Procedure:

Charles Rieck, Training Director, was instructed to contact all women whose names were on the petition to ascertain the substance of charges made in the anonymous letter. Mr. Rieck and Rudy Teschan analyzed the anonymous letter and concluded that four potential charges were identified. Accordingly, they asked each of the women the following questions:

1. Were you told that your merit increase in July 1975 would be denied or jeopardized if you did not withdraw your objections to the Stevens Point training session?
2. Were you told that your behavior in this matter would be recorded in your personnel file?
3. Were you told that your actions would affect future promotions?
4. Were you on probation at the time you signed the memo and was your probation or promotion affected by it?

Three of the employees interviewed indicated that as they talked to their women supervisors about the petition and training session they construed their questions and comments adverse to their career interests.

Those three employees who felt their supervisors' comments or questions were detrimental to their interests were then questioned at length by David Schwarz, a DNR hearing examiner.

The interviews conducted by Attorney Schwarz reveal that some of the subject matter noted in the anonymous letter was discussed with three of the employees. There is no agreement whatsoever by the women supervisors and these three interviewed women as to whether any threats or challenges were made pertaining to merit increases, promotions, probationary actions or filing negative material in the employee personnel file.

The supervisors indicate that they attempted to secure employee evaluations as to what would be proper expenditures under an energy conservation program and the importance of training in future promotions.

The hearing examiner, training officer, John Beale (Deputy Secretary) and William Matson reviewed all available data regarding the questions and responses of the supervisors and women employees.

Observations and Findings:

Neither Mr. Voigt, Department Secretary, nor Mr. Beale, Deputy Secretary, had ever discussed the petition with any of the three women who had alleged that their status had been threatened or challenged.

Most women interpreted the petition as asking rescheduling of the training session strictly as an expression of their willingness to meet in Madison rather than Stevens Point.

A number of women who were asked to sign the petition refused.

A check of Department personnel files reveals that there is not now and has never been any material placed in the employes' personnel files regarding this training session nor the petition.

Four of the women invited to the training session were on probation due to promotions and all completed probation satisfactorily with no effect to their salary adjustments.

A number of women volunteered that the anonymous letter was not likely to have been written by a Department secretary or woman employe due to both the style and the array of criticism.

A confusing admixture of statement and attitude appears to compound an accurate evaluation of exactly what was said between the women supervisors and the women trainees. It appears injudicious to have discussed certain items without better planning. Some curious situations developed from the circulation of the petition:

A number of the secretarial employes did not know the parties who solicited their signatures on the petition.

A number indicated they had not read the petition.

One male employe filed written objection to being excluded from the Women in Management program.

One woman employe reluctantly responded to a request from a state senator's office for copies of her correspondence pertaining to this training session.

One woman employe who was not invited to the training session signed the petition complaining of the personal inconvenience caused by attendance.

Conclusions:

1. The subject matter of merit increases, promotions and career advancement was discussed in a number of interviews with women employes scheduled for training, however, we are unable to find any evidence of intent to harm an employe's status.
2. Faulty communication, all oral, between the women supervisors and the women scheduled for training appears to be the prime source of irritation to three employes of the 20 petition signers.
3. No disciplinary action appears indicated by the actions of either supervisors or women scheduled for training.
4. A need for training in both communications and supervision is strongly indicated and the experiences of this review will be beneficial in improving our training sessions.

Prepared by William A. Matson
June 18, 1975