

CASE OVERVIEW

This complaint has come forward as the result of a complaint by Trish DeLaine, a senior associate in your Accountancy firm. Trish is in her fifth year of employment. She is to be considered for a shareholder position at the Board meeting in January, 2009.

Trish has visited with Ranelle Scott, the HR Manager several times over the past year. She has shared with Ranelle that she is going through a difficult divorce and has expressed concerns about the impact of possibly gaining full custody of her children. Since Trish travels approximately 30% time, she has asked about options to best manage her travel, and expressed concerns that her changing circumstances might affect her value to the firm. Ranelle has referred Trish to the firm's EAP contractor and has acquainted her with various policies that might be helpful to her. Ranelle reports that none of Trish's prior visits has suggested anything but a practical and appropriate approach to these issues. Ranelle states that Trish has asked her to refrain from discussing Trish's concerns with her manager, and also to keep the news of her familial situation confidential, which Ranelle has agreed to.

Yesterday, October 16th, Trish contacted Ranelle and asked to speak with her confidentially. Thinking that the conversation was to be about the same matters as before, Ranelle readily agreed. She reports being surprised when Trish stated that she was contemplating a sexual harassment complaint and wanted Ranelle's frank thoughts about how such a complaint would be handled. It became apparent that Trish was making a complaint.

Because of limitations on resources and Ranelle's prior coaching of Trish, an outside investigator has been engaged.

- 1) We will conduct an intake with Trish
- 2) We will interview McIntosh's assistant, who Trish believes may have observed some conduct she is concerned about
- 3) We will interview Mitchell, about whom Trish is complaining

