



**EEOC**  
TRAINING INSTITUTE

**U.S. Equal Employment Opportunity Commission  
Dallas District Office**

# **What Employers Need to Know: Latest EEOC Developments, Best Practices for Conducting EEO Investigations and Effective Strategies to Addressing Workplace Harassment, Bullying, and Retaliation**

**July 9, 2024**

**8:00 am – 3:30 pm Central**

**In-Person Event – No Virtual Options**

**The Hurst Conference Center,  
1601 Campus Drive, Hurst, Texas 76054**

## **AGENDA**

<b>Time</b>	<b>Presentation</b>
7:00 am	Workshop Opens
8:00 am	<b>Opening Remarks</b> Travis Nicholson, District Director, EEOC Dallas District Office
8:05 am	<b>Recent Developments in EEO Law</b> Lisa Morelli, EEOC Acting Associate General Counsel The session will cover the EEOC's Priority Areas under the 2024-2028 Strategic Enforcement Plan (SEP). Key discussion points will include the Pregnant Workers Fairness Act (PWFA), the EEOC Enforcement Guidance on Harassment in the Workplace, and highlights of significant EEOC litigation and court decisions that impact workplace policies and practices.

Tonya Lennox  
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### **Time Presentation**

**9:05 am First Steps After an EEOC Complaint (Part One)**

Juan Munoz, Intake Supervisor, EEOC Dallas District Office

Shemell Perry, Enforcement Supervisor, EEOC Dallas District Office

This session will provide comprehensive guidance on navigating through the EEOC's Administrative Review and Compliance (ARC) processes. The discussion will focus on initiating and conducting internal investigations, interviewing witnesses, gathering evidence efficiently, maintaining relevant documents, and preparing effective and timely responses to EEOC inquiries.

**10:05 am Coffee Break**

**10:15 am Navigating a Cause Finding: Investigating an EEOC Complaint (Part Two)**

Brooke Lopez, Trial Attorney, EEOC Dallas District Office

This session will provide detailed guidance on what to do after the EEOC has completed its investigation and issued a Letter of Determination. The discussion will cover the conciliation process, types of relief and training programs, litigation process, and review recent EEOC cause cases.

**11:15 am Retaliation: Why Poke the Bear?**

David Schlottman, Partner, Jackson Walker LLP

This session will provide a detailed discussion about workplace retaliation and what it means to engage in such protected activities as participating in a complaint process and opposing unlawful conduct. The session will cover affirmative defenses, legal standards, and best practices.

**12:15 pm Lunch Break**

**1:15 pm Addressing Harassment and Workplace Bullying**

Mark Ellison, Outreach Education Coordinator, EEOC Office of Federal Operations

Private and federal sector employers have critical legal responsibilities to prevent and remedy unlawful workplace harassment. This session will cover the EEOC's new Enforcement Guidance on Harassment in the Workplace, including covered bases for harassment, causation factors, and theories of liability. This discussion will also focus on effective strategies for investigating workplace harassment and implementing promising practices for prevention.

**2:15 pm Afternoon Break – Beverages and Snacks**



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### Time Presentation

2:25 pm **Panel Discussion: Questions and Answers**

Tonya Lennox, Outreach and Education Coordinator, EEOC Dallas District Office

Brooke Lopez, Trial Attorney, EEOC Dallas District Office

Juan Munoz, Intake Supervisor, EEOC Dallas District Office

Shemell Perry, Enforcement Supervisor, EEOC Dallas District Office

Ian Schoff, Mediator, EEOC Dallas District Office

Join the EEOC Dallas District Team for a highly interactive session designed to answer your questions and provide tips and strategies for EEO compliance.

3:25 pm **Closing Remarks**

Ligita Landry, Deputy Director, EEOC Dallas District Office

3:30 pm **Adjourn**

**REGISTRATION FEE: \$425.00 per person**

**REGISTER HERE: [Dallas In-Person Workshop](#)**

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We strive to host inclusive, accessible events that enable all individuals, including individuals with disabilities, to engage fully. To request an accommodation or for inquiries about accessibility (preferably by June 30), please contact Tonya Lennox.

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#### **Mark Ellison, Outreach Education Coordinator, EEOC Office of Federal Operations**

Mark Ellison serves within the EEOC Office of Federal Operations, specifically in the Federal Sector Programs Outreach Training and Engagement Division. His role involves delivering training and conducting outreach initiatives targeted at federal agencies. Mark temporarily held the position of Acting Assistant Director within the same division. Before his current tenure at the Office of Federal Operations, Mark was with the EEOC's Washington Field Office as the Outreach and Education Coordinator, where he oversaw an extensive external training program, encompassing both paid and complimentary outreach efforts. His journey with the EEOC began in the Detroit Field Office as an Investigator, where he examined claims of illegal employment discrimination, aligning with the EEOC's regulatory standards. He also assumed the role of Enforcement Supervisor at the EEOC's Dallas District Office. Mark Ellison is recognized for his contributions as a speaker at various conferences and events across local, state, regional, and national levels. His military background includes service in the United States Army. Academically, he has earned degrees from multiple universities, including the University of Michigan in Ann Arbor, MI. Presently, he is pursuing a J.D. at the Northwestern California University School of Law.



#### **Ligita Landry, Deputy Director, EEOC Dallas District Office**

Ligita Landry is the Deputy Director with the Dallas of the U.S. Equal Employment Opportunity Commission. She directs various EEOC functions including enforcement, mediation, outreach, and hearings. She is responsible for coordinating the district's activities to ensure effective and efficient operation in addressing employment discrimination. In her capacity as the Dallas District Systemic Coordinator, she oversees systemic investigations, focusing on pattern and practice discrimination cases to identify and address systemic issues within the workplace.

Ms. Landry's extensive experience and leadership within the EEOC highlight her commitment to enforcing anti-discrimination laws and fostering inclusive workplaces. Her role in overseeing systemic investigations is vital in identifying and rectifying broad patterns of discriminatory practices, thereby contributing significantly to the EEOC's mission.

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#### **Tonya Lennox, Outreach and Education Coordinator, EEOC Dallas District Office**

Tonya Lennox is the Outreach and Education Coordinator in the EEOC Dallas District Office. She began her federal career as a law enforcement officer with the U.S. Marshals Services; the Federal Bureau of Prisons and served in human resource management at the U.S. Department of Veterans Affairs where she was created programs with the EEO management team.

Ms. Lennox began her twenty plus year career with the EEOC as an investigator in the Little Rock Area Office, senior investigator in the Richmond, Virginia, and Oklahoma City Area Office. She specialized in investigating high-profile, class action discrimination cases and was chosen to train her peers and shortly had a proven record as a highly rated EEOC speaker. In 2014, she was promoted as a member of the Enforcement management team in Charlotte District Office's Raleigh Area Office. In January 2022, she was appointed as Outreach and Education Coordinator for the Philadelphia District Office before coming to Texas.

She is a graduate of both the University of Guam in the Marianas Islands where she studied Criminal Justice and the Southern Nazarene University, in Oklahoma, receiving her B.S. degree in human resource management.



#### **Brooke Lopez, Trial Attorney, EEOC Dallas District Office**

Brooke López is a Trial Attorney with the Dallas District of the U.S. Equal Employment Opportunity Commission where she accepted after graduating 3rd in her class with *magna cum laude* honors from University of North Texas at Dallas College of Law in May 2021. She received her Bachelor of Science in Public Affairs degree from University of Texas at Dallas in December 2017 where she also graduated with *cum laude*, service, and major honors. In her free time, Brooke manages the Lone Star Parity Project, a nonpartisan nonprofit advancing women in Texas politics.

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#### **Lisa Morelli, EEOC Acting Assistant General Counsel**



Lisa Morelli is the Acting Assistant General Counsel in the Office of General Counsel for the U.S. Equal Employment Opportunity Commission and oversees 325+ field attorneys and EEOC's national litigation program; reviews requests for litigation authority approval and provides oversight on cases in active litigation in federal court including on ethics, sanctions issues, expert procurements, and proposed settlements. She supervised the Internal Litigation Services attorney unit in employment-related administrative complaints and lawsuits brought by applicants for employment and current or former EEOC employees. She previously served as the Senior Attorney Advisor to the EEOC's Deputy General Counsel where she was responsible for managing all programmatic, operational, and administrative functions of OGC-HQ and the field legal units and worked as a Senior Trial Attorney with the Seattle legal unit where she litigated cases under Title VII, the ADA, the ADEA, and the EPA. Prior to the EEOC, Ms. Morelli worked as an Associate at a boutique employment discrimination law firm in Washington, D.C. and was a judicial law clerk for the Hon. Cheryl M. Long at the D.C. Superior Court. Ms. Morelli obtained her B.S. degree in Business Administration from Villanova University and her J.D. from the Columbus School of Law, Catholic University of America.

#### **Juan Munoz, Intake CRITU Supervisor, EEOC Dallas District Office**



Juan Munoz is the Intake Supervisor with the Dallas District of the U.S. Equal Employment Opportunity Commission has over 15 years of experience with EEOC. He began his career as a Bilingual Investigator and currently serves as a supervisor in the Dallas District Office, overseeing the daily operations of multiple departments, including our Charge Receipts Department. Munoz leads a team responsible for conducting interviews with external and internal stakeholders, analyzing, processing, investigating, and resolving cases of private sector labor discrimination. As a member of the Dallas District management team, he plays a key role in training staff and identifying and assessing complex, high-priority investigations, including large class and systemic cases, based on our regional and national strategic plans.

Munoz's outstanding performance as a supervisor and trainer earned him a nomination for the Circle of Excellence award for his contributions to the national new investigator training initiative. He regularly conducts compliance manual-based training sessions across the district and other offices and provides expert technical assistance aligned with office-wide goals and objectives. Munoz's efforts are focused on strengthening the Commission's enforcement of all relevant laws, with a particular emphasis on outreach to vulnerable immigrant and migrant communities, as well as underserved populations.

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#### **Travis Nicholson, District Director, EEOC Dallas District Office**



Travis Nicholson is the District Director of the EEOC Dallas District. Mr. Nicholson began his career with the EEOC in 2009, as a Bilingual Investigator with the EEOC's Detroit Field Office. During his tenure with the Detroit Field Office, he investigated charges alleging violation of the statues enforced by the Commission. Mr. Nicholson was the EEOC Charlotte District Outreach and Education Coordinator from 2014 to 2017 and was responsible for the full range of outreach initiatives and activities within the district's area of responsibility. Mr. Nicholson served in the Office of Field Program (OFP) Field Management Programs as a Program Analyst from 2017 to 2019 and was the Houston District Deputy Director from July 2019 to August 2022.

Mr. Nicholson also served on a detail assignment as the Chief, National Enforcement Modernization Project where he led the charge/case management modernization efforts for OFP. Mr. Nicholson was formerly a Compliance Officer with the U.S. Department of Labor Office of Federal Contract Compliance Programs. Mr. Nicholson has been married to his lovely wife for 27 years and they have two fantastic boys. Mr. Nicholson is a proud Veteran of the U.S. Army and native Detroit, MI.

#### **Shemell Perry, Enforcement Supervisor, EEOC Dallas District Office**



Shemell Perry is an Enforcement Supervisor with the EEOC Dallas District Office and has been with EEOC since 2021. Shemell provides supervision, direction and guidance to a staff charged with investigating workplace discrimination based on the laws applicable under EEOC jurisdiction. Shemell is passionate about the work performed by the Commission. She encourages collaboration to seek agreeable remedies for all parties involved.

Prior to joining EEOC, Shemell has worked in Human Resources, Claims and Contact Center Leadership with Fortune 50 companies for more than 20 years coaching, leadership development, talent acquisition, performance management and employee relations/investigations to all levels of employees. Shemell was responsible for creating staffing and attrition tools to help better facilitate real-time staffing allocations, investigating policy violations, recruitment, change management and other HR/Leadership related initiatives. She assisted in the development of Key Performance Indicators (KPIs) for multiple positions from entry-level to leadership.

Shemell holds a master's in human resources management and a bachelors in Mass Communications (Print) from the University of North Florida. She also maintains a PH-R certification from HRCI, in addition to numerous insurance designations. Shemell is a United States Navy veteran and a native-Floridian and proudly supports her Miami Dolphins.

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#### **David Schlottman, Partner, Jackson Walker, LLP**



David Schlottman is an Advisor and Litigator with Jackson Walker, LLC and he focuses on complex cases involving employees, the workplace, and related business disputes. He has wide-ranging experience in helping clients with business problems and lawsuits involving wage-and-hour, employee competition, theft of trade secrets, contract claims, compensation disputes, employment discrimination and retaliation, and union-related disputes. David distinguishes his practice through preparation, knowledge of the rules, exceptional work product, and accessibility and responsiveness to clients. David strives to deliver creative and tailored case strategies in line with a client's business objectives and cost expectations.

David stays current on relevant legal trends through regular participation in local bar activities and assisting with continuing legal education presentations. Additionally, David has served as a contributor to the influential treatise *Employment Discrimination Law*, which is published by the American Bar Association's Section of Labor & Employment Law.

Throughout law school at Baylor, David was recognized for his advocacy and written work product. He was a member of winning mock trial and moot court teams. He was also published in the *Baylor Law Review* and later served as its Editor-in-Chief for the 2011-2012 school year. B.A., *with high honors*, Abilene Christian University, J.D., *magna cum laude*, Baylor Law School.