

## Workplace Bullying: Project Strategy

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### **ABSTRACT**

*Bullying in the workplace is a common phenomenon that has been reported in various types of organizations throughout the world. Surprisingly, the Bureau of Labor Statistics reported that a majority of the workplaces do not have a formal program or policy that prevents or mitigates workplace bullying. Thus, some organizations may be practicing corporate/institutional bullying and entrenching bullying throughout the organization. The authors present a predefined project structure for building the business case to support examining the practices within organizations and determining whether there is a need to allocate resources to execute a workplace bullying program.*

*The business case will introduce a lens in which the senior leadership team will consider the risks as well as the benefits of implementing a strategic program. The structure includes developing an action plan for determining whether there is a need to conduct a fair investigation and protect the targeted from bullying and most notably mitigates workplace bullying. The structure for the project as reported by Stroh & Johnson (2005) includes identifying the problem, determining what data to collect to study the problem, finding and collecting the data, and thereafter summarizing, evaluating, and drawing conclusions. The authors support the presentation of the framework with statistical data reported by the 2009 National Business Ethics Survey and the Workplace Bullying Institute to lay the foundation for identifying the problem and determining what data need to be collected and where to find the data. The authors discuss the benefits of executing bullying programs and conclude with some suggestions for implementation.*

### **INTRODUCTION**

A number of companies have implemented processes by which to ensure that the company has the necessary workforce to adequately meet the desired business needs and to minimize the percentage of low performing employees within the organization (Mathis & Jackson, 2008). Various terms such as *right-sizing* or *down-sizing* are used to note the efforts by business organizations to ensure employee levels and business needs are compatible and that low-performing employees are properly monitored. However, it is just as important for companies to identify and maintain those employees who have been noted as performing at a high level. If not

properly motivated, acknowledged, and rewarded, these employees may move on to other organizations where these needs can be met.

In an effort to retain employees that may leave for better opportunities, organizations are looking not only at compensation as a means to retain employees but also intangibles. The intangibles include the work environment, quality-of-life factors as well as trusting relationships (Glendinning, 2001). The trusting relationships may include bosses, team members and other co-workers within and outside of departments. The trusting relationships include fellow employees that are considerate, competent, and supportive of individual talents and work situations. The lack of trusting relationships may create situations in which some employees are confronted with workplace bullying situations.

In order to determine the dynamics of workplace bullying, it is important that there be a clear and definite understanding of this concept. This is first achieved by obtaining a solid definition of the term workplace bullying. "Workplace bullying is defined as a repeated, health-harming mistreatment of one or more persons (the targets) by one or more perpetrators that takes one or more of the following forms: verbal abuse, offensive conduct/behaviors (including nonverbal) which are threatening, humiliating or intimidating, and work interference — sabotage — which prevents work from getting done" ("Workplace bullying defined by the workplace bullying institute," n.d.). "Some researchers make the case that a definition of bullying should include "relational aggression," which can be social (such as gossiping or social exclusion) or direct (such as deliberately ignoring someone or informing them they're not welcome" (*The Next Step in Curbing Workplace Bullying*, 11/19/2010).

The Workplace bullying concept can be quite significant to an organizational entity and its effects may be varied and far reaching. Workplace bullying in organizations has been noted to impact employee turnover, employee retention, recruiting and succession planning, productivity, and physical health of employees (Glendinning, 2001). Bullying activities "squench any potential for mentoring and professional development from the ranks, so that, if and when the bully leaves, not only does he or she leave behind a damaged organization, but a leadership vacuum as well" (Glendinning, 2001, p. 24). Additionally, bullying behaviors usually cause health-related issues which in turn increase organizations' costs in health insurance premiums and absenteeism. (Glendinning, 2001).

In addition to impacts to the individual and organization, workplace bullying can also impact society financially as well as socially. Bullying can create situations that require court involvement, unemployment, and feelings of isolation and estrangement (Vega & Comer, 2005). Organizations are beginning to explore answers to the following questions: (1) Does your organization practice corporate/institutional bully? (2) Does your organization entrench bullying throughout the organization? The exploration includes a decision to document a business case to support examining the practices within organizations and determining whether there is a need to allocate resources to execute a workplace bullying program.

A poll conducted by Zogby International for the Workplace Bullying Institute reported that an estimated 54 million American workers (37 percent of the U.S. workforce) have been bullied at work (Deschenaux, 2007). Furthermore, that number would be increased to 71.5

million if it included the number of persons that witnessed the workplace bullying. Even more surprising is that “bullied workers report that employers predominately did nothing to stop the mistreatment” (How Employers & Co-Workers Respond to Workplace Bullying, 2008).

The purpose of this paper is to present a predefined project structure for building the business case to support examining the practices within organizations and determining whether there is a need to allocate resources to execute a workplace bullying program. The proposed structure is business-oriented and comprehensive in that it includes factors that enable a complete evaluation of the organization’s current state of ethical practices and policies. The structure for the project as reported by Stroh & Johnson (2005) includes identifying the problem, determining what data to collect to study the problem, finding and collecting the data, and thereafter summarizing, evaluating, and drawing conclusions. The structure of the project as reported by Stroh & Johnson (2005) is also aligned with PMI’s PMBOK project management framework that includes “planning, executing, monitoring and controlling, and closing” (PMI Global Standard, 2004, p. 8). Identifying the problem and determining the data to collect are tasks that are executed in the planning phase. Analyzing the data, summarizing, and evaluating are activities that are implemented in the execution, and monitoring and controlling phases. Thereafter, drawing conclusions is an activity conducted in the closing phase of the project.

**DIAGNOSIS, DATA COLLECTION, SUMMARY, EVALUATION AND DRAWING CONCLUSIONS**

To develop an action plan for determining whether there is a need to conduct a fair investigation and protect the targeted from further bullying, organizations need to consider “carefully diagnosing the problem you were brought in to deal with and determining what data need to be collected to ensure that the problem is thoroughly investigated” (Stroh & Johnson, 2005, p. 60). “One useful way to think of the diagnosis and data collection phase of a project as five interrelated steps: (a) identifying the problem; (b) assessing the data that need to be collected to study the problem; (c) determining where to find these data; (d) deciding how to collect the data; and (e) summarizing, evaluating, and drawing conclusions from the data” (Stroh & Johnson, 2005, p. 60).

The below statistics from Workplace Bullying Institute revealed that in 52.5% of the time, bullied workers reported that employers basically did nothing to stop the bullying and in 70.7% of the time retaliated against the employer who reported the infraction. The aforementioned statistics were further validated by a study conducted by the Ethics Resource Center. The 2009 National Business Ethics Survey reported that “perceived retaliation as a result of a report of misconduct rose, from 12 to 15 percent, over the two years” (Survey: Business Ethics Improved During Recession, 11/24/2009).

Action	Percent
Conducted fair investigation and protected target from further bullying	1.7%
Conducted fair investigation with negative consequences for the bully but no safety for target	6.2%
Inadequate/unfair investigation; no consequences for bully or target	8.7%
Inadequate/unfair investigation; no consequences of	31%

bully but target was retaliated against	
Employer did nothing; no consequences for bully or target	12.8%
Employer did nothing; target was retaliated against but kept job	15.7%
Employer did nothing; target was retaliated against and eventually lost job	24%
Total	100.1%

**Table 1 Bullying Statistics**

When conducting step 1 in the framework *identifying the problem*, questions to consider include (a) “is the problem the client has identified the real problem, or is this problem merely a symptom of the problem that really needs to be addressed” (Stroh & Johnson, 2005, p. 60); (b) “are there aspects of the organization’s culture that will affect” (Stroh & Johnson, 2005, p. 60) the problem? Is the problem that employers are not acting upon reports of workplace bullying or is the real problem that the organizations’ cultures foster workplace bullying actions? Thus, indirectly providing avenues for workplace bullying offenders to continue to perpetuate unsafe work environment for their targets.

Is the root cause of the problem “simultaneous pairing of power with feelings of inadequacy that led people to lash out” (Create a Bully-Free Workplace, 2010). Statistics from the 2008 Workplace Bully Institute noted that 73.6% of the bullies were ranked above the target by one of more levels in the organization. Additionally, the problem may continue to perpetuate because as reported by the 2007 WBI-Zogby survey “only 15% of the bullied individuals ever formally complained to their employers, only 4% filed EEO state or federal claims, and a miniscule 3% filed lawsuits against bullying employers!” (How Employers & Co-Workers Respond to Workplace Bullying, 2008, p. 2).

After the problem has been clearly defined, steps 2, 3 and 4 include *assessing the data that need to be collected to study the problem, determining where to find these data, and deciding how to collect the data*. Thus, organizations need to decide what information is needed to answer the questions that will yield a resolution to the problem. Additionally, the organizations need to determine the information needed and sources of information as well as how to collect the data.

Listed below are some of the questions and the information that is needed to reply to those questions that will help yield whether there needs to be a program to prevent or mitigate workplace bullying.

- 1) How many of your employees have been bullied in your organization over a one year period and a five year period?
- 2) Are employees leaving the company due to workplace bullying? If so, what is the percentage of employees over a one year period and a five year period?
- 3) Are employees missing work due to illnesses related to workplace bullying? If so, how many are leaving during a one year period and a five year period?
- 4) Are jobs designed in such a way that performance goals are unrealistic?

- 5) Do you provide ethics training and leadership seminars that reinforce and remind employees to reflect on their core values?
- 6) What are the hiring practices of candidates? More specifically, does your company use tools to hire candidates that are trustworthy and psychologically secure and confident in their abilities to execute strategies? (Fast, 2010)

One source of internal data within organizations is Human Resources. This department plays a key role in preventing and mitigating workplace bullying situations. One of the most important factors in preventing or mitigating workplace bullying is if organizational cultures are perceived as proactively promoting a workplace free of bullying (Caponecchia & Wyatt, 2009). The human resource-related functions that are involved in establishing a workplace free of bullying include recruiting and selection, performance management, and training and learning. When conducting recruiting and selection activities, bullies “are found to often lie about their qualifications and experience, or describe it in ambiguous terms which are misleading. Check everything in their resume thoroughly, as lying and deception can be used as the basis for disciplinary offenses” (Query & Hanley, 2010). As performances are assessed and rewards and benefits are allocated, organizations need to be careful not to promote an employee that has achieved by manipulating or harming other employees (Salin, 2003). Appraising staff need to also consider the performance goals that are assigned to employees. Provide training and learning to human resources staff and well as all employees about what constitutes bullying behaviors and what are the consequences for engaging in the behaviors. One source of external data is the *Workplace Bullying Institute* as identified in the article.

“Once you have a good idea of the information you need to address this issue of interest to the client and know where it might be obtained, the next step is to decide how to collect the information” (Stroh & Johnson, 2005, pp. 68- 69). “Every interaction you have in the organization is an opportunity to observe and collect data” (Stroh & Johnson, 2005, p. 69). “Observing the person’s attitude about the organization for which he or she works, how the person speaks about and refers to employees, and whether “what the organization says” matches “what it actually does” can sometimes provide more useful information than you can gather from survey and interview” (Stroh & Johnson, 2005, pp. 69-70).

There are “four common ways to collect data: (a) conducting interview, (c) performing surveys, (c) observing, and (d) reviewing existing records” (Stroh & Johnson, 2005, p. 70), (e) focus groups and (f) internal audits. The next step in the diagnosis and data collection process is to determine where to obtain the information you need to determine how to mitigate workplace bullying in the workplace. You may want to consider multiple ways to collect data. Interviews are time consuming (Schwandt, 2001) but “one of the best and the most frequently used ways to gain information” (Stroh & Johnson, 2005). The interviewer has the great fortune of following up and asking why individuals feel a certain way. This practice is usually not conducted during a questionnaire. Surveys can be “a very effective tool for learning about how the people in an organization feel about a variety of issues, from the way management treats employees; to whether employees receive adequate, valuable training; to whether decision making proceeds in a top-down or bottom-up manner (Stroh & Johnson, 2005, p. 71).

Observing people conducting business operations is another way to collect data. The question that is asked when observing is “what’s going on here?” (Schwandt, 2001, p. 179). “The advantage of this technique is that people are observed (usually) in their natural setting, doing what they normally do. This is in contrast to the interview or survey, in which people report on how they feel or behave” (Stroh & Johnson, 2005, p. 73). Another form of data collection is by examining existing records. For example, the project team can examine company data on hiring and selection practices, training and learning programs and metrics collected during company exit interviews.

Questions	Information Needed and Sources of Information	Data Collection
How many of your employees have been bullied in your organization over a one year period and a five year period?	Bullying metrics from employees	Interviews, Observing, Reviewing Existing Records, Internal Audits
Are employees leaving the company due to workplace bullying? If so, what is the percentage of employees over a one year period and a five year period?	Bullying metrics from employees	Interviews, Observing, Reviewing Existing Records, Internal Audits
Are employees missing work due to illnesses related to workplace bullying? If so, how many are leaving during a one year period and a five year period?	Bullying metrics from employees	Interviews, Surveys, Reviewing Existing Records, Internal Audits
Are jobs designed in such a way that performance goals are unrealistic?	Review of job descriptions and performance documents  Discussion with human resources and managers executing performance reviews	Interviews, Surveys, Reviewing Existing Records, Internal Audits
Do you provide ethics training and leadership seminars that reinforce and remind employees to reflect on their core values?	Review of training curriculum including training manuals  Discussions with training and learning staff	Interviews, Surveys, Reviewing Existing Records, Internal Audits
What are the hiring practices of candidates? More specifically, does your company use tools to hire candidates that are trustworthy and psychologically secure and confident in their abilities to execute strategies?	Human Resource hiring processes and procedures for leadership and management positions	Interviews, Observing, Reviewing Existing Records, Internal Audits

**Table 2 Data Identification and Collection**

The last step in the model includes *summarizing, evaluating, and drawing conclusions*. Completing the data collection processes is a major milestone in developing a business case. However, “data have little value unless they are analyzed and summarized in a manner that is useful to the reader” (Stroh & Johnson, 2005, p. 102). During this phase, the organization needs to summarize and evaluate the findings in a way that will allow for conclusions about whether to proceed forward with a workplace bullying program in the workplace. Listed below is a table that includes the questions and suggested responses that were identified in the data identification and collection phases. The authors suggest that if your organizations responses are 20% or greater and the responses are ‘no’ for the indicated questions that you need to consider allocating resources to invest in a workplace bullying program in order to mitigate bullying. Additionally, the overall continuous goal for all organizations is to work towards a workplace free of bullying.

Questions	Responses
How many of your employees have been bullied in your organization over a one year period and a five year period?	20 % or greater
Are employees leaving the company due to workplace bullying? If so, what is the percentage of employees over a one year period and a five year period?	20% or greater
Are employees missing work due to illnesses related to workplace bullying? If so, how many are leaving during a one year period and a five year period?	20% or greater
Are jobs designed in such a way that performance goals are unrealistic?	No
Do you provide ethics training and leadership seminars that reinforce and remind employees to reflect on their core values?	No
Does your company use tools to hire candidates that are trustworthy and psychologically secure and confident in their abilities to execute strategies?	No

Another consideration, as it relates to summarizing, evaluating, and concluding the project strategy, is to try to determine how much bullying is costing the organization. Some suggested inputs to cost include employee turnover, sickness absences, poor productivity, Query & Hanley, 2010) and increase cost of insurance premiums. One suggestion as a part of evaluation

would be to comment on the reporting systems that are currently in place to support workplace bullying. As reported in the 2007 WBI-Zogby survey “only 15% of the bullied individuals ever formally complained to their employers” (How Employers & Co-Workers Respond to Workplace Bullying, 2008, p. 2). Thus, underreporting is a very important consideration as it relates to determining whether there is a need to mitigate workplace bullying.

When communicating the conclusions to the senior leadership team of the organization, the project team needs to present information related to: 1) what is the real problem and not the symptoms of the problem; 2) what will be the benefits for implementing the workplace bullying program; and 3) what are some suggestions for implementation (Stroh & Johnson, 2005). The benefits for implementing the workplace bullying program and some suggestion for implementation are discussed in the conclusion of this paper.

## **CONCLUSION**

The decision to implement a workplace bullying program to prevent and mitigate bullying practices in the workplace has employee and organizational implications. “It seems clear that businesses without values are business at risk. Their reputations suffer in the marketplace, depressing stock prices and eroding consumer confidence. Recruitment of talented personnel is more difficult. Many companies now perform due diligence on companies that are considering as partners or suppliers, and are passing on those that don’t meet their ethical standards” (Driscoll & Hoffman, 2009, p. 12). Workplace bullying programs help to reduce employee turnover, improve employee retention, enable recruiting and succession planning, increase productivity, and aids in reducing employee health concerns increases (Glendinning, 2001). “Employee morale is also higher in a company that has well-developed values and lives by them. A commitment to shared values, rather than a culture that is based on distrust of employees, encourages employees to aspire to success. A study by professors at Bentley University found that among the benefits of a value-based culture are increased awareness of ethical issues, commitment to the organization, employee integrity, willingness to communicate openly about problems, willingness to report an ethics violation to management, improved decision making, willingness to seek advice about ethical issues, and reduced unethical conduct” (Driscoll & Hoffman, 2009, p. 12).

Once it has been determined that workplace bullying occurs within your organization and needs to be prevented and mitigated the senior leadership team has a “responsibility to take a systematic approach to identifying the risk of workplace bullying, assessing its likely consequences, and preventing the risk from occurring” (Caponecchia & Wyatt, 2009, p. 447). For example, “recruiting and selection is one of the key human resource functions that can be used to defray workplace bullying issues. As employees are screened and interviewed, organizations should communicate the expectation about personal behavior within the workplace” (Carden & Boyd, 2010, p. 149). This communication includes apprising potential employees that non-threatening, bullying behaviors are not tolerated in the workplace. Additionally, background and reference information should be checked and verified in order to determine whether there is a history or potential chance of behaviors that are not aligned with the company’s culture (Glendinning, 2001).

Creating, deploying, and executing an anti-bullying program is part of a wider commitment to ensure a work environment that is safe, supportive, and productive (Query & Hanley, 2010). Some suggestions to consider while implementing workplace bullying programs

include gaining commitment from the top, establishing a code of ethics, communicating resources and obtaining feedback, training and awareness, audits and evaluations, and revision and reform (Driscoll & Hoffman, 2009). Changes in cultural practices need to include an explicit commitment from the senior leadership team about the importance of the execution of the program. Additionally, “the written ethics code should contain at least a sufficient level of guidance for employees and others who may read it (Driscoll & Hoffman, 2009, p. 13). “A workplace bullying policy (sometimes called code of ethics) serves as a means to prevent bullying behavior, raise awareness to behaviors, legitimize dialogue about what constitutes bullying, and to provide an avenue for enforcement related to accountability for one’s actions. The behaviors may be intentional or unintentional. A policy serves as a key resource for employees before, during, or after a bullying encounter. The code of ethics should include: clear objectives and goals; the most recent federal and state laws, and industry regulations (Driscoll & Hoffman, 2009).

Communication needs to include feedback from employees as well as information from employers related to “help” resources (Business and Legal Reports, Inc., 2008). “For example, employees need to listen to feedback from employees as it relates to workplace bullying in the environment. The feedback can be obtained from exit interviews, fellow co-workers, managers and supervisors, as well as from customers and clients. Additionally, organizations may conduct periodical open forums in which employees communicate their workplace bullying experiences” (Carden & Boyd, 2010, pp. 152-153).

“Training awareness programs need to expose and reinforce employees to the policies as well as the behaviors that constitute workplace bullying. Administrative training needs to also be conducted for supervisors and higher levels within the organization” (Carden & Boyd, 2010, p. 151. For example, administrative training topics may include “proper use of grievance procedures, and training in issues of confidentiality, conflicts of interest and due process (Caponecchia & Wyatt, 2009). Included within the assessment of the training programs, is an ongoing practice of monitoring and measuring the overall effectiveness of the workplace bullying program (Driscoll & Hoffman, 2009) through audits and evaluations.

“A program to instill values into an organization must be more than a static model that sits on a shelf gathering dust. It must be a living instrument. Circumstances and situations change and programs must adapt” (Driscoll & Hoffman, 2009, p. 13). Organizations have an ongoing responsibility to ensure the work environment is healthy and productive and the approach needs to be considered as an ongoing project that needs to be managed. More specifically, the primary function of organizations is to manage the project by first inputting controls to prevent bullying and then to enact controls to minimize the impact of bullying and reduce negative consequences (Caponecchia & Wyatt, 2009). The initiation of these controls starts with first identifying who is ultimately responsible for administration of the controls and who should be held accountable for action and inaction. Most organizations place the responsibility on the human resources department in that many of the controls includes processes, procedures and practices that the human resources department leads, coordinates or implements. A systematic approach that can be used by the human resources department to execute bullying programs includes: (1) identifying bullying behaviors and practices by committing to a culture and environment that prevents the inaction, (2) analyzing and documenting the likely impacts, (3) controlling the environment by providing awareness training and developing procedures and policies for reporting and taking

action, and (4) evaluate that current state of the organization by following up on data collection and enacting continuous improvement processes (Caponecchia & Wyatt, 2009).

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