

When I knew it was time to leave: Bottom-up workplace bullying

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ABSTRACT

This case is about an employee newly promoted to manager who confronts workplace bullying from a subordinate. The subordinate slowly undermines the manager's authority, encouraging others to do likewise. The senior director, to whom the manager reports, does not see the divisive nature of the subordinate and does not address the building interpersonal issue. The manager is gradually traumatized by the erosion of her authority. For purposes of confidentiality details of the case have been disguised.

INTRODUCTION

In 1999 Lisa Cazzin was hired by the Government of Canada. It was a great opportunity to develop a career. Lisa had an undergraduate degree in English Literature and a Masters in Political Science. She had worked in a private company for two years after graduation but found after a year she was ready for a change. She applied for a government position that a friend had told her about but heard nothing. She kept applying to companies that offered career options but companies either were not hiring or only had entry level positions. Almost eight months after she submitted her resume to the Government of Canada she received a call for an interview. Two months later she was working for the federal government.

Lisa worked for almost seven years in a department of the Government of Canada. She was a manager for the last two years of her employment in the department but eventually quit due to interpersonal problems. Of particular problem was an employee who engaged in bottom-up bullying.

Becoming a Manager

There were two manager positions created in her area at the time Lisa became manager. According to Lisa, "I took the job because I wanted to create an environment that I would like to work in." One of Lisa's coworkers, Dale, encouraged her to go for a manager position and Lisa encouraged Dale to do the same. Lisa and Dale had a supportive relationship. Lisa respected Dale as an equal and vice versa. However, that was about to change. Dale did not apply as she did not want the responsibility of being a manager. So Jamie and Lisa became managers. Once Lisa became a manager and tried to assume the responsibilities of her new job, Dale seemed to turn on her. Lisa watched Dale with new insights. Dale appeared to use and manipulate people around her to further her objectives. One of Dale's objectives was bullying Lisa into acting according to how Dale thought the area should be run. As Lisa saw it, Dale did not want to be a manager because she was much more effective at running the department behind the scenes than she would ever have been in a position of power as manager.

The Task of Firing

Lisa managed 45 people. Before taking the job Lisa thought Shawn, the senior director she reported to, was somewhat benevolent. Her opinion changed when Lisa became a manager. As manager, part of Lisa's job was disciplining employees who overlooked or ignored organizational policies and procedures. In retrospect, Lisa thought maybe Lisa made Shawn defensive because she accomplished things in her first three weeks of being a manager that Shawn had been trying to do for seven years.

In particular, Lisa got rid of three problem employees – Shelly, Chris and Mel. The circumstances are outlined below. Shelly left a confidential report at her boyfriend's house and the report went missing. She refused to act

upon Lisa's directions regarding this incident so Lisa engaged in a progressive discipline process. Eventually, however, Lisa started termination proceedings. Lisa also dealt with a distressed employee, Chris, who had already required several stress leaves. This time Chris, started yelling at her husband during a phone conversation from her office. During this phone fight, Chris also threw items off her desk and slammed doors. Shortly thereafter Lisa completed the paper work for Chris to go on another stress leave. As part of the leave agreement, Lisa included a return-to-work agenda for Chris. Eventually, Chris and Lisa both agreed that Chris could no longer work for the organization. Mel, the third employee Lisa let go, had problems with repeatedly being late and missing full days of work. Mel's behaviour appeared to influence other employees who also started to be late and absent.

While dealing with these employees, Lisa maintained confidentiality about the problems and management's actions. Dale, however, wanted to know the details and discuss Lisa's actions. Before the two managers were added to the organization, all staff were involved in organizational decisions. That had now changed. Employees were no longer allowed to be included in management decisions unless they were invited. However, following Dale's lead, the employees resorted to gossip to fill the void. Dale convinced those around her that Lisa was untrustworthy as a manager because she could easily turn her back on somebody as she did with the three employees who were terminated. Yet, prior to Lisa's appointment as manager, Dale and Lisa had often discussed the same employees. Dale often shared her concerns about these employees. These had been long-term problem employees.

Make Sure Your Reports are Complete

As her supervisor, Lisa soon discovered that Dale's performance left much to be desired. Lisa came across reports by Dale that were only two or three short paragraphs long. These reports, which should have been a page to a page and a half long, were audits of government funded health clinics. So Lisa told Dale "I know that you're capable of more complete reports than this. I am not requiring you to rewrite them. I just expect to see improvement on future reports."

Shortly after this request, Lisa began to see Dale using child-like testing behavior. Dale's reports started to be late as well as short. Submitting late reports was not uncommon in their department due to the heavy workloads. Even when Lisa went on vacation the senior director of her department would ask her to ensure her reports were complete. Lisa's department had to always be prepared in case another government agency or a politician requested a copy of their reports, especially when the department completed audits.

It was a commonly accepted practice, that, as a manager, you gently remind employees to complete their reports. So, that is what Lisa did. When Dale requested vacation time, Lisa approved the time off, but reminded Dale to have her reports finished before leaving. Dale's response was to yell at Lisa. "How dare you make that request?" Dale shouted. Initially Lisa was fairly calm, saying: "Well, you know, I make that request of everybody. Is there any doubt that you're a couple of weeks behind?" Dale just kept arguing loudly with Lisa. Lisa thought: She is doing the word games - that twisting thing distorting past comments by Lisa. "Well you said...blah blah blah." Then Lisa said something that she regretted. "Look. Don't play word games with me. Don't pull this crap with me because if you do I can play this as well as you can." Lisa knew she was challenging Dale, similar to a declaration of war.

Relational Aggression

After incident about the quality of Dale's reports, Lisa believed that Dale systematically poisoned the work environment for her, tainting employees' opinion of Lisa. Dale particularly tried to shape new employees' views of Lisa. Lisa would hire someone she thought was reasonable, but, shortly after the new employee started, they would become difficult to work with. The new employees would make remarks to Lisa such as: "Well, I don't really want to talk about that. I don't know if I really trust you. You're the manager." Lisa had a pretty good idea that Dale instigated such attitudes and comments. Dale did things that clearly showed others that she did not respect Lisa's authority. For example, Dale used her phone to text messages during team meetings that Lisa led. Only seven people attended these meetings so it was obvious to all what Dale was doing. This was a new behaviour since Lisa took the management position. From Lisa's perspective, Dale's behaviour sent a clear message that Dale thought Lisa's meetings were irrelevant and she was only attending because she had to.

Retirement Party

About six months after Lisa took the management position, there was a retirement party held for Al, an employee who had worked 22 years for the department. Employees were allowed to bring a companion. Lisa brought her husband Pete who saw the office politics that he had heard about from his wife. When the couple got home, Pete told Lisa that Shawn, the senior director, appeared to really like and respect her. Pete noted that

Shawn listened intently to her, but not to others within the organization. Pete explained, “When you speak, he stops whatever he’s doing and he looks at you, and he listens. He doesn’t do that for anybody else in the organization.” Lisa was pleased to hear that. At least Shawn respected her. The only problem was that with the current poisoned work environment, Shawn’s respect could make Lisa more of a target. Dale was eroding Lisa’s realm of influence among the employees she supervised. Lisa now worried that Dale would undermine her influence further within the organization. Lisa thought “How long before Dale took her attitude about me up the food chain?”

Dale Declares She Feels Unsafe

The situation further deteriorated when Dale declared that she felt unsafe with Lisa as her manager and wanted mediation to address the problem. Lisa was surprised. She wondered in amazement how Dale had become the victim. Lisa concluded that Dale’s “feeling unsafe with Lisa” was a control tactics. Shawn, the senior director, took on the role of mediator. Lisa told Shawn that she thought Dale was trying to undermine her attempts to get Dale to do her work.

The same week that Dale requested mediation, Lisa hurt her right knee. She was in excruciating pain and only wanted to deal with the most pressing issues at work. Lisa’s knee limited her energy to deal with anything but the items of the highest priority. She wanted Shawn to make Dale clarify her opinion - to get to the point about the issue of feeling unsafe. Lisa knew it would be hard for Dale to substantiate her claims about what made her feel unsafe. If Shawn pressed the issue of why Dale felt unsafe this challenge by Dale could be quickly ended. If she really was acting to make Dale feel unsafe the issue would quickly move out of Shawn’s hands and be sent to legal or HR.

At the first mediation meeting Dale plunked a tape recorder on the table and said she was feeling unsafe. As a result she wanted a recording of everything that was said. Dale also presented a memo to Shawn that outlined everything she believed Lisa had done wrong since she became a manager. The memo said nothing specific. Lisa asked Dale to explain, Lisa said to Dale: “You say you’re feeling unsafe with me. I’m unclear about what it is that I’ve done. I understand that maybe you’re feeling like you want an apology but I don’t know what it is that I’ve done. So can you give me some clarity so that I can address the issue?”

Dale responded: “You know what you’ve done.” To which Lisa said “Well, actually, no, I don’t. I wouldn’t be asking you if I did. I need some clarification please.” Lisa wasn’t yelling...but she knew that her voice had become louder. Dale responded, but Lisa could not focus on what was being said. What was clear to Lisa, was that there was no reason given for Dale’s allegations. The situation was too upsetting for Lisa to deal with. Lisa wondered how Shawn could let Dale go on without explaining her accusations. Again, Lisa politely and calmly asked Dale to explain. “If you are actually here in good faith I expect to be given an explanation. That is what we are here for.” At this point Shawn stepped in and said, “Dale needs to talk about how she feels.” Lisa felt he was completely undermining her authority. Dale pointed out how insensitive Lisa was. Dale also reaffirmed that Lisa never gave her an opportunity to address her needs. These sessions continued for about seven months. Lisa continued to ask both Dale and Shawn what she could do differently. Lisa never got a direct answer. Lisa came to understand, however, that Dale felt Lisa lied and hence could not be trusted. The problem for Lisa was that Dale never provided examples of Lisa lying or how she made her feel unsafe. Without the explanations or examples Lisa was unable to consider how she might change her behaviour or have a meaningful dialogue about the issue.

From Lisa’s perspective, Dale was a rogue employee. Dale was an employee who was not writing reports properly, who was poisoning the work environment and, even if you take away those two things and say there’s been a misunderstanding, was deliberately not engaging in good faith to move discussions forward. After seven months of meetings Lisa was still unclear about how she made Dale feel “unsafe.” Instead, during the meetings, Dale and Shawn would have chummy chats about personal things such as their house renovations.

Eventually another manager, Jamie, became responsible for Dale’s work. Dale openly and frequently praised Jamie, making it clear that Jamie was a much better manager than Lisa.

Lisa’s authority was continually undermined by Dale for close to two years. Lisa felt as if no one trusted her and that Dale was in charge. Furthermore, Shawn, the senior director, was not strong enough to address the problem.

According to Lisa “The sabotage was unrelenting. The challenge to my authority was in looks, gossip, behaviours, poor performance or lack of performance and personal attacks. I had become the person nobody

trusted. Dale was running the show – as I saw it by pressure and fear. Our senior director was too weak to address the problem.”

Employee Issue

During the seven months of mediation meetings (between Lisa and Dale), another employee, Joyce, became a problem for Lisa. Joyce had about a dozen health cards in her drawer that she had confiscated while doing health clinic audits. The department policy was very clear that all confiscated health care cards should be scanned, documented and destroyed. This was to avoid someone stealing the cards to use for their own health care needs or to sell for others to use. Joyce had told both Shawn and Lisa about the cards in her desk. However, the information was shared in passing conversations (in the hallway in Lisa’s case), and, as a result neither had registered that keeping the cards in Joyce’s desk was an ongoing problem. After Dale heard about the health cards, she addressed Lisa in an overly dramatic way saying, “Joyce’s got cards in her drawer. Did you know about that?” Lisa responded, “No. I’ll look into it.” When she did, Joyce reminded Lisa that she had already mentioned the cards to both Shawn and her. Dale also told Shawn about the cards. At this point Lisa was not supervising Dale, Jamie was. By Dale telling Shawn, Dale was leap-frogging the line of authority. Lisa also went to Shawn and told him: “I don’t remember anything about this issue. I remember Joyce saying something (about it), but I cannot remember what.” Since both Lisa and Shawn felt they had neglected their responsibilities to deal with the health-card issue when they initially heard about it, they did not take any disciplinary action against Joyce. However they told Joyce to re-read her policy manual. Lisa also thanked Dale for telling her about the health-cards and let her know she had dealt with it.

Next, Lisa heard that Joyce was dating a health clinic manager. Lisa gave Joyce a written warning because she had failed to follow policy again. While such dating was allowed, the department policy was to stop auditing a clinic at which one was romantically involved with staff. Joyce did not request to have the clinic that her romantic partner managed removed from her list. Lisa told Joyce: “Look, you know what the policies and procedures are. You broke them. There’s enough of this going on that, at this point, I’m going to give you a written warning. Please take it seriously because I do not want to have to do this again. This is to get your attention. We do expect you to follow policy and procedure, or at least check with us first.”

Shortly thereafter it was discovered that Joyce was letting clinic managers know in advance that she was going to drop by for supposedly unannounced audits. When Lisa confronted Joyce about this, she laughed and said, “Well you didn’t say I couldn’t do this.” Lisa wrote another warning letter that was broader in scope. This second letter included the warning “...if there are any infractions on any policy in the future...” She just had to up the ante.

Despite already writing two warning letters to Joyce, Lisa soon had to confront her about another serious breach of policy (and common sense). Another employee (Rita) told Lisa that she saw Joyce taking some paper files and a computer out of the office during the weekend Rita also said, “I’m scared about telling you because I will ‘get it’ from the rest of the group if anybody knows that I informed you.” Lisa quickly called Joyce, telling her “It has come to my attention that there are files and a computer missing. The risk is the computer could be stolen. The building security has confirmed it was you. I want you to gather these up and return them to the office before the end of the day.” By 6pm that day the files and computer were returned.

By now, Lisa was livid about the work situation. As Lisa saw it things were getting sillier and sillier with Joyce. During her rule breaking spree, Joyce of three to four months Joyce was befriending Dale. Lisa concluded that Dale was grooming the alliance and encouraging testing behaviour against Lisa’s authority. They were both completing their MBAs together at a night course. Their new knowledge gave Dale and Joyce their own management language. Lisa would hear such comments as: “Lisa does not fully empower us. We need job enrichment and engagement around here.”; “Lisa has no idea of how to complete performance management evaluations or link the performance management to strategy.” and “Lisa’s not a leader.” According to Lisa, the pair would freely share such unfounded ideas with other employees. The atmosphere created by such comments contributed to Lisa’s heart racing and stomach problems. Lisa found work increasingly difficult to cope with. She had to talk herself into going to work each morning.

Impact on Lisa

Initially, for the first year in a management role, Lisa thought the work situation was her fault because she was too lenient with the problem employees. Lisa’s thinking evolved as she found that her, and the department’s senior director Shawn, never asserted his authority. She realized that a person with the power that Shawn had must establish rules or at least demonstrate appropriate ways to deal with aggressive problem employees. Finally, Lisa went into Shawn’s office and said, “Shawn, I have a legal right not to be abused in the workplace.”

But this effort made no difference. By this point Lisa had all the psychological symptoms of acute stress. She suffered from sleeplessness, worry, forgetfulness, anxiety, tearfulness, detachment from work and life in general, anger and even hyperventilating. At times Lisa found she was holding her breath or had stomach pain for no apparent reason other than stress. She knew this could not go on forever. Either the situation would take Lisa over the brink emotionally or health problems would stop her.

Defining Moment

Finally, after nearly two years there was a defining moment when Lisa realized she could not play this game any longer. Rita, who had been a good employee, (the one who had told Lisa when Joyce took a computer and files out of the workplace) offered hockey tickets to a to employees of a health clinic that she had just finished auditing. Employees were not to give anything, including token items with little or no value, to the employees in the clinics they monitored and audited. Lisa gave Rita a verbal warning. Later that day Lisa dropped by Joyce's office. Joyce was at her desk with her back to Lisa. When Lisa started talking to Joyce, she wheeled around and lunged forward at Lisa. Joyce then with intense anger said, "Well, I expect to see Rita disciplined the way you disciplined me. I expect her to have a one-week suspension without pay." Lisa was stunned and confused because it was Jamie, the other manager, and not herself, who gave the one-week suspension to Joyce. Lisa was shell shocked. She felt like she was having a panic attack. Joyce was twice as large as Lisa was. This was way beyond dialogue – it was a physical threat. Lisa realized a line had been crossed. She had a moment of clarity about the last two years in which she understood for the first time that it was not her fault. Rather, it was the organization as a whole that had a need to make her the "bad guy." Lisa realized that people in the organization were dysfunctional enough to make up things that she had done. She concluded there was no winning this game.

Lisa walked down the hall and phoned her doctor's office and made an appointment for that day. She started to cry. Her crying and body shaking were uncontrollable. Lisa felt hysterical. The scene attracted the senior director Shawn's attention. Shawn came over and asked Lisa what he could do for her. Lisa replied, "Get me out of this department. Help me get a transfer to another department immediately with my reputation intact." Shawn agreed to her request. According to Lisa "I knew I was going down for the count."

Later, Lisa's doctor gave her a prescription to help cope with the situation. Her doctor for the only time in his career as her doctor, actually looked concerned for her and provided a letter for her to take two weeks off work to think about her work options and to ensure the medication started working. Lisa went home, talked to her husband and opted not to take the medication, but to take the two weeks off. She went back in two weeks with a resignation letter. Lisa realized that a transfer would not resolve her work problems. She felt too traumatized to simply take a new job in the same organization. Nor would a different department heal the damage to her reputation that had been done. After two years of harassment, Joyce's action was the definitive moment for her. Lisa went from believing she was an incompetent manager who needed to try harder, learn more and be nicer or tougher or whatever, to realizing that she needed to get out of a bad situation. When Joyce blamed Lisa for something Jamie, the other manager, had done, it identified that what Lisa was in was a psychotic process. It was not based in reality or facts but rather a group perception. Lisa realized that there was no solution to a psychotic process because it had nothing to do with her. As Lisa explained "By the time you are dealing with a psychotic process -- there is no fixing that because it's not about me. It's about them." It took two years of incredible harassment, and then just a couple of sentences to kick Lisa over to: 'Ok. It's time to go.'

After Lisa left her job she took time off to heal and look at her options. In evaluating her previous work situation she had the following comments: "It is scary to me that it doesn't take much for one person to undermine a whole organization. It seems to me that Dale had more power in appearing to be one of the abused children (a hard done by employee) in the family (the organization), than being either mother or father (a manager). She constantly needed to have something to fight against, and win, in order to avoid feeling helpless. The entire organization participated in fulfilling that need. When I look back I realize not everyone can be managed as fully functional. I've come to terms with this. I have concluded when you treat someone fairly, someone that's got a screw loose, they think there's something wrong with you. You are weak because their world is 'kill or be killed.' And, if you engineer it so that they have to look at their own behavior, they hate you."

"I think the experience has permanently damaged me. My heart still races when I remember what happened. I experienced memory loss during those two years, especially at the end "Maybe it's a good thing I don't remember some of this. It's so upsetting." I still have problems retrieving words. If something activates my nervous system I get the shakes like I did during those two years. The stress took its toll on me. I should have left earlier but the harassment leads to such a phase of self doubt where decisions are hard to make."

TEACHING NOTE

Case Overview

This case is about an employee newly promoted to manager who confronts workplace bullying from a subordinate. The subordinate slowly undermines the manager's authority, encouraging others to do likewise. The senior director, to whom the manager reports, does not see the divisive nature of the subordinate and does not address the building interpersonal issue. The manager is gradually traumatized by the erosion of her authority. For purposes of confidentiality details of the case have been disguised.

This case is appropriate for undergraduate and graduate courses which look at management, interpersonal conflict, power, workplace bullying and human resources issues.

This case is based on primary research completed through interviews. For purposes of confidentiality details of the cases have been disguised but the core content has remained in tact. This case focuses on the perspective of the affected employee.

Learning Objectives

The learning objectives of this case are:

1. To identify workplace bullying.
2. To provide an example of how upward bullying – subordinate to manager – can occur.
3. To demonstrate how workplace bullying can undermine the management of an organization if ignored.
4. To identify the impact workplace bullying can have on employees and show how the experiencing can lead to trauma.
5. To examine the options management has for dealing with workplace bullying.
6. To examine the relationship between power and workplace bullying.

Case Related Questions:

1. What is workplace bullying?

Workplace bullying is unwanted repeated actions and practices directed against one or more employees. It may be done deliberately or unconsciously. It often causes humiliation, offence and distress (Einarsen and Raknes, 1997).

Particular bullying behaviour includes (Sutton, 2007):

- “Personal insults
- Invading one's ‘personal territory’
- Uninvited physical contact
- Threats and intimidation, both verbal and nonverbal
- ‘Sarcastic jokes’ and ‘teasing’ used as insult delivery systems
- Withering e-mail flames
- Status slaps or ‘status degradation’ rituals
- Rude interruptions
- Two-faced attacks
- Dirty looks
- Treating people as if they are invisible.”

Rayer et al. (2002) place workplace bullying behaviour into five categories:

1. **Threat to professional status:** belittling opinions, public professional humiliation, accusation regarding lack of effort.
2. **Threat to personal standing:** name calling, insults, intimidation, devaluing with reference to age.
3. **Isolation:** Preventing access to opportunities, physical or social isolation, withholding information.
4. **Overwork:** Undue pressure, impossible deadlines, unnecessary disruptions.
5. **Destabilization:** Failure to acknowledge good work, allocation of meaningless tasks, removal of responsibility, repeated reminders of blunders, setting up to fail.

2. How frequently does upward bullying (e.g. subordinate to manager) occur?

According to a study by Namie and Namie (2003) the majority of workplace bullying, 81 per cent, is imposed by a supervisor on a subordinate. Of the remaining cases in this study 14 per cent was same rank bullying and 5 per cent was lower rank bullying upward. A more recent study on Australian managers by Branch (2006) that

involved 138 Australian managers found that 22 per cent experienced upward bullying. This bullying impacted the manager's job effectiveness, satisfaction, intention to leave and organizational identification. Branch concluded that upward bullying is a disturbing social phenomenon that is unrecognized in many organizations.

3. How does workplace bullying of the manager highlighted in the case undermine the management of the organization?

In this case the organization through growth has decided that two employees are needed to assume management positions. Employees were asked to apply and were screened for the positions. The challenge for the selected employees who assume management positions is that the role of these employees and the hierarchy of the organization is changed. This requires a change in the relationships the new managers have with the other employees. The new managers have the responsibility of following organizational policies and requiring employees to do so as well. The difficulty for the manager is that the senior director is unwilling or unable to support the new manager role and new organizational hierarchy. This could be because the senior director is:

1. Unaware of the problem
2. Unable to manage
3. Unable to control the subordinate and feels at times bullied themselves
4. Unable to identify the bullying tactics being used by the subordinate as they are uneducated about workplace bullying
5. Is manipulated by the subordinate so they do not see there is a problem

The impact of the poor management skills by the senior director is that those hired as managers are unable to effectively manage and spend too much of their time asserting their authority rather than managing.

4. What bully tactics does the subordinate (Dale) and others use on the manager?

The subordinates, primarily Dale, directly and indirectly bullies in the following ways:

- Insubordination (e.g. Dale's response "You know what you've done" to a request by the manager to tell her what she felt she had done wrong during the mediation sessions)
- Spreading gossip, humiliating and ridiculing (e.g. Dale and Joyce spreading ideas that Lisa was not a leader or did not know how to empower or complete performance evaluations)
- Being shouted at (e.g. Dale yelling at the manager when requested to complete reports before her vacation)
- Intimidating, threatening behaviour, physical threat (e.g. Joyce's physical threat semi-lunging at the manager regarding the discipline of Rita)
- Reminders of errors
- Criticizing work (e.g. Dale giving a memo to the senior director saying all the things the manager had done wrong but the memo says nothing specific)
- Making others appear to be the aggressor (e.g. Dale declared that she felt unsafe with the manager and wanted mediation. Dale bringing a tape recorder to the mediation meetings and declaring herself feeling unsafe with the manager)
- Being pressured regarding disciplinary actions, excessive monitoring and being reminded of work rules and the appropriate application of rules (Joyce expecting to see Rita disciplined the way she was disciplined - one week's suspension without pay)
- Subordinate obtaining the support of other's inappropriately (e.g. Dale convincing others the manager could not be trusted as she had terminated three employees or convincing new hires the manager could not be trusted)
- Going over the manager's head (Dale goes to Shawn about Joyce having health cards in her drawer. This is breaking organizational policy)
- Ignoring (e.g. Dale texting in small meetings run by the manager)
- Ignoring authority (e.g. Dale wanting to know details about the three terminations, Dale ignoring request to complete reports by the manager and initiating child testing behaviour regarding submitting reports)

5. What is trauma and how is it linked to workplace bullying?

Trauma is an unpleasant event that is related to a life- or personhood-threatening situations. The event is less important than the person's perception of the event. The effects of trauma are clustered under the diagnosis of PTSD (Peyton, 2003). The symptoms include stress, difficulties learning new information, distraction, being unfocused or feeling "triggered," and difficulty processing information or situations (Glumac, 1999). Individuals experiencing flashbacks associated with the trauma may respond by (Glumac, 1999: 339) "Persistent avoidance of stimuli associated with the trauma and numbing of general responsiveness as indicated by:

- (1) Efforts to avoid thoughts, feelings, or conversations associated with the trauma
- (2) Efforts to avoid activities, places, or people that arouse recollections of the trauma

- (3) Inability to recall an important aspect of the trauma
- (4) Marked diminished interest or participation in significant activities
- (5) Feelings of detachment or estrangement from others
- (6) Restricted range of affect
- (7) Sense of foreshortened future (e.g. does not expect to have a career)"

Research has linked trauma as identified through PTSD with workplace bullying. A study by Leymann and Gustafsson (1996) evaluating the symptoms of 64 patients subject to workplace bullying found the patients displayed a severe degree of PTSD fully comparable with PTSD from prison camp experiences. Mikkelsen and Einarsen (2002) completed a study with 118 subjects assessing the prevalence and severity of PTSD. Mattheisen and Einarsen (2004) surveyed 102 individuals that had experienced workplace bullying and found that 57 per cent had experienced distress and symptoms of PTSD. The level of distress and PTSD was higher in those who were still being subject to the bullying versus those where the bullying had stopped more than a year earlier. A recent French study by Bonafons, Jehel and Coroller-Bequet (2009) looking at 22 court cases involving harassment found that clinical signs of PTSD can be linked with bullying, and such identification greatly facilitate matters for victims of mental harassment in the workplace.

6. Does the manager in this case experience trauma due to the workplace bullying?

There are indications in the case that the manager found the experience of upward bullying traumatizing. These include:

- a. *Physical response to a flashback of the event and memory loss*
 "I think the experience has permanently damaged me. My heart still races when I remember what happened. I experienced memory loss during those two years, especially at the end. I still have problems retrieving words. If something activates my nervous system I get the shakes like I did during those two years. I never had that symptom before. The stress took its toll on me. I should have left earlier but the harassment leads to such a phase of self doubt that decisions are hard to make."
- b. *Efforts to avoid activities, places, or people that arouse recollections of the trauma*
 "I found work increasingly difficult to cope with. I had to talk myself into work each morning."
- c. *Inability to recall an important aspect of the trauma*
 "Maybe it's a good thing I don't remember some of this stuff. It's so upsetting."
- d. *Marked diminished interest or participation in significant activities*
 Lisa found she had feelings of detachment from work and life in general.

7. How does this case relate to management and leadership?

The case links to management and leadership through issues of hierarchy, authority and leadership style. In reading this case it is important to move beyond viewing the situation as strictly a workplace bully case between two employees. There are many possible applications of management and leadership theory to this case. The following are some examples.

a. Hierarchy and Authority

The case identifies the importance of having and preserving a hierarchy and a discipline process. The case shows how a lack of attention by the senior director to a chain of command causes the organization to fall prey to an individual that does not respect the decisions and authority of those in power. With organizations removing layers and flattening the organizational structure it is important to recognize the benefits of such a hierarchy.

Authority is the ultimate source of power in an organization (Weber, 1947). The organizational chart depicts the chain of command in the organization – the system of hierarchical reporting relationships in an organization. The hierarchy is a classification of authority and rank. Sources of power other than authority and rank lead to an informal hierarchy that is different than what is documented in the organizational chart. These sources of power include (Mechanic, 1962): Control over resources, control over information, nonsubstitutability, centrality, control over uncertainty and unobtrusive power.

In this case Dale avoids the work and criticism of taking on a position of formal authority but maintains and develops informal power. Shawn the senior director does not recognize the problem in letting this employee

build such a power base and does not appear to have the experience, insight or strength to reinforce the formal chain of command. In particular Dale maintains power the following ways:

1. Control over information:
 - Informing new hires about the organization and management.
 - Trying to be part of the decision making process by expecting the new manager to tell her about the details related to the termination cases and then spreading rumours about not trusting the new manager when not informed.
 - Convincing others such as Joyce about her perspective on the weaknesses of the manager.
2. Centrality
 - Creating a regular meeting time with the senior director where Dale enjoys a personal chat at the expense of the manager and the authority of the manager.
3. Unobtrusive Power
 - Creating a dominate coalition made of employees that follow Dale's subversive leadership and become hard to control or confront for the manager and the senior director.

b. Leadership

This case has many links to leadership as a key underlying issue is the leadership style that is adopted by the senior director. For example, Yukl et. al (2002) identify two styles of leadership behaviour – people oriented and task oriented behavior. In this case the manager, a more task oriented leader, has a different and complementary style to the senior director, a people oriented leader. A people-oriented leadership includes consideration, being employee-centred and having a concern for people. The task-oriented leadership involves initiating structure, being job-centred and having a concern for the product. The senior director recognizes the value in having a manager who is task-oriented and as such promotes this employee to a management position. The problem is the senior director does not support the task-oriented decisions the manager makes taking away from the managers leadership style and the benefits of having this person as a manager. It also appears the organization has been without task-oriented leadership so there is resistance to this structuring of the organization.

Another application to this case includes a systems perspective (Senge, 1990) where the whole organization is considered rather than just two individuals – the manger and the subordinate. The relations of the staff to management (both managers and director), to their client organizations and those running the organizations and to the overall effectiveness of the organization need to be considered. The comment by the manager that Dale is using the organization to deal with personal issues around control suggests that the impact of Dale's actions go beyond just her relation with the manager. "She constantly needed to have something to fight against, and win, in order to avoid feeling helpless. The entire organization participated in fulfilling that need." It also seems the lack of attention to policy by employees indicates a system-wise issue of which this case of workplace bullying is only one symptom.

Theory on emotional intelligence as related to leadership and management can also be applied this case. The key characters of the case can be considered from an emotional intelligence perspective (Boyatzis and Goleman, 2001). How much self awareness (e.g. emotional awareness), self management (emotional self-control), social awareness (empathy and organizational awareness) and relationship management (e.g. conflict management and communication) does each key player have? From the details of the case it would appear that Dale is low on all four components of emotional intelligence. The senior director appears high on social awareness but weak in areas of relationship management. The manager appears strong in self awareness and self management but unable in the role as manager to actualize social awareness and relationship management due to a lack of support by the senior director. It also appears that the interplay between the key players negatively impacts the emotional intelligence of the players and thus the leadership of the organization. The case details can be used to debate people's views of the emotional intelligence of the participants.

8. What happened after the manager left?

According to Lisa: "About two years after Lisa left the organization, she heard that the senior director Shawn had gone on a lengthy stress leave. Lisa guessed that Shawn had become the workplace's "incompetent one" like she had been. Jamie had been able to avoid the target of Dale for a number of years. Jamie had always been able to curry favour with Dale and she rode the wave for almost three years. When Shawn returned from stress leave he hired a second manager (essentially to replace Lisa). A few months later, Jamie left the organization, likely a result of challenging behaviour in the workplace. Lisa guessed that Dale found the new manager easier than Jamie to use and manipulate. It seemed as if Shawn then Jamie had become Dale's targets because they could no longer appease Dale. Even now I can feel the vibrations starting up in my body thinking about it."

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