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Series Editor's Foreword

About the *Learning for Practice* series

Education and training are essential underpinnings of high-quality professional practice. This series of learning and development manuals is therefore intended to provide foundations for promoting learning across the helping professions. Each manual offers guidance for new and experienced trainers alike, for managers and supervisors interested in promoting learning within their team or area of responsibility and for college or university lecturers wanting to go beyond simply delivering lectures.

The series has grown out of the Russell House *Theory into Practice* series of books which has been so successful in providing clear, short introductions to particular areas of theory as they apply to practice. Some of the manuals in this series are based on the issues covered in one or more of the books in that series, while other manuals have no direct connection with the series – although they all share a commitment to making an understanding of theory and professional knowledge more broadly accessible for practitioners and managers in order to try and make sure that our practice is *informed* practice.

The authors contributing to the series have a wealth of experience and expertise in promoting learning. Each manual therefore offers important insights, ideas and guidance that should be of great benefit in delivering high-quality learning and development events.

Experienced trainers, tutors and managers used to acting as learning facilitators should find the materials presented and the guidance given relatively straightforward. People with relatively little experience of running learning events will find the materials and guidance helpful, but may need additional support to translate the ideas given into successful learning outcomes. Such support may involve the backing of a more experienced colleague or the use of books and manuals specifically about running successful learning events, or indeed a combination of the two. So, whether experienced or not, this manual should offer a firm foundation on which to build.

About this manual

This is a revised version of a manual previously published by Learning Curve Publishing. It is unfortunately the case that, in the intervening years, the need to counter bullying and harassment in the workplace has not diminished. Sadly, we continue to have a problem in modern workplaces as a result of the tendency for some people to abuse or misuse their power over others, with often devastating results. There continues, then, to be a major need for training and development materials to support the promotion of learning around how to prevent bullying and harassment, how best to respond when they do occur and how to deal with the aftermath. This manual seeks to fulfil that need by providing a basis for understanding the complexities underpinning bullying and harassment, together with suggestions for exercises that can be used as activities on training courses or other staff development events or as part of the learning experience for students at

colleges and universities.

The subject matter of this manual is a very important set of factors when it comes to trying to ensure that our workplaces are based on dignity and a commitment to promoting well-being for the sake of all concerned, employees, employers and all the organisation's stakeholders. This manual therefore has an important part to play in helping us move in the right direction.

Neil Thompson, series editor

The series editor

Neil Thompson is a Director of Avenue Consulting Ltd, a company offering training and consultancy across the 'people professions' – that is, the helping professions plus management, supervision and leadership more broadly (www.avenueconsulting.co.uk). He has held full or honorary professorial positions at four UK universities and is now a sought-after trainer, consultant and conference speaker.

Neil has qualifications in social work; training and development; mediation and alternative dispute resolution; and management (MBA) as well as a first-class honours degree and a PhD. He is a Fellow of the Chartered Institute of Personnel and Development, the Higher Education Academy and the Royal Society of Arts, as well as a Life Fellow of the Institute of Welsh Affairs. In addition, he is a member of the International Work Group on Death, Dying and Bereavement.

Neil is a highly respected author, with over 100 publications to his name, including several bestselling books. He is the editor of the US-based international journal, *Illness, Crisis & Loss* and also edits the e-zine, *Well-being* (www.well-being.org.uk). He has been a speaker at conferences and seminars in the UK, Ireland, Spain, Italy, the Netherlands, the Czech Republic, Norway, Greece, India, Hong Kong, Canada, the United States and Australia. He is the series editor for the Russell House *Theory into Practice* series of books. His website is at www.neilthompson.info.

Prospective authors wishing to make a contribution to the *Learning for Practice* series should contact Neil via his company website, www.avenueconsulting.co.uk

The author

Neil Thompson first became interested in the subject of bullying and harassment as a result of his interest in stress. The more he studied stress, the more he came to realise that bullying and harassment were major sources of stress. He also came to realise that they were much more common phenomena in our workplaces than most people generally realise. This became a key factor in the development of his interest in workplace well-being, as he was increasingly recognising that the problems he had been used to encountering in families and communities in his role as a social worker were also to be found in the workplace. Despite their prevalence, he could see that such problems were often not dealt with, frequently with very detrimental consequences for some people. His work in developing this manual can therefore be seen as part of his commitment to making workplace well-being more than an empty concept.

Acknowledgements

I am grateful to Willie More who originally encouraged me to develop the materials that form the basis of this manual. He was also very helpful in supporting the writing of the first edition, and so this manual owes a great debt of thanks to his knowledge, skills and commitment.

Anna Thompson of Learning Curve Publishing has done an impressive job in the editing and layout work for this manual, and so I am very grateful to her for that. Geoffrey Mann and his colleagues at Russell House Publishing have, as always, been a pleasure to work with and deserve great credit for their important part in bringing this work to fruition. Finally, as in so many aspects of my life, I owe a great debt of thanks to Susan Thompson for being such a major support in so many ways.

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IMPORTANT NOTE

Copies of a 96-page booklet that makes an ideal set of ready-made reference materials on this manual's subject matter are available at a discount price from Learning Curve Publishing.

Please e-mail: info@avenueconsulting.co.uk for details

Introduction

Since the 1990s there has been a growth of interest in organisational problems, such as stress and the related problems of bullying and harassment. It has been a period of major change in organisational working patterns. As Cooper (1999) puts it:

The pace and extent of change in society in general, and in work in particular, have been dramatic over the past 20 years. The word 'stress' has found as firm a place in our modern business vocabulary as the phrase 'process re-engineering'. We have moved from the 'entrepreneurial 1980s' to the 'outsourcing and downsizing 1990s' to an emergent 'flexible and short-term contract' culture. This has meant longer hours at work, intrinsic job insecurity and an increasing lack of balance between our work and home lives. (p. 34)

A significant part of this growing awareness of the significance of certain aspects of organisational life was the recognition of bullying and harassment as problems that were too serious to be ignored or allowed to continue unchecked.

The old style of industrial relations with considerable conflict between managers and unions has largely been replaced with a more enlightened style of management (in certain quarters at least) in which it is recognised that it is in the organisation's interests to treat staff well and to avoid conflict. Recent years have therefore seen a much stronger emphasis on ensuring that staff are well supported in undertaking their duties, that they are recognised as 'the organisation's most important asset' – although it has to be recognised that many organisations have subscribed to this type of rhetoric without necessarily making it a feature of day-to-day reality for staff. Increasingly we are hearing about the importance of 'workplace well-being', the recognition that, to get the best out of staff, organisations need to adopt a supportive approach to their staff, treat them with dignity and make sure that they are not abused or exploited in any way. To what extent the rhetoric of well-being translates into reality seems to vary from organisation to organisation, and so we clearly have a long way to go in that regard.

The less prominent role played by trade unions has left many staff vulnerable to the attentions of bullies and unscrupulous harassers who take advantage of the less pronounced presence of trade union protection. This has led to two developments. First, many managers have recognised the dangers of allowing bullying to feature in the workplace and have endeavoured to develop strategies for tackling it. Second, many trade unions have sought to use whatever power they do have in the modern era to promote awareness of the problems, to press for formal policies to be instituted and to support individual staff who fall foul of the unacceptable behaviour of certain individuals.

We now find ourselves in a situation where there is indeed a higher level of awareness, but still a lot of ignorance; a body of protective legislation, but still a lot of gaps, loopholes and vulnerable areas; and a commitment amongst some organisations at least to reduce or eradicate the problem, although there are still many organisations that have not even begun to address the complexities of this very important aspect of organisational life.

This training manual has been written to help continue the process of raising levels of awareness and understanding, to support committed individuals and organisations to pursue the goal of a safe and harassment-free working environment, and to try to convince those that are not yet committed that it is very much in their interests to join the movement to tackle bullying and harassment and all the problems that these issues raise.

It will not provide ready-made solutions but it should provide enough food for thought to encourage people to engage further with the issues, wrestle with the complexities and work together to tackle the problems.

Customising the training material for your own requirements

• Managers and supervisors

There are powerful arguments that all managers and supervisors should be aware of this material in its totality and that it should reflect in their day-to-day interactions with staff. In practice, however, you might feel that certain areas at certain times require greater emphasis than others; for example, with a group of managers who have recently attended an in-depth seminar on 'workplace legislation' and where policies and procedures have been carefully crafted and implemented, you may feel that you wish to concentrate on 'manager' self-awareness issues with an emphasis on Sections 5 to 10 and Section 12.

It is this sort of planning that will make the programme both relevant and credible. Remember, the first reaction of many managers and supervisors is that, if there is bullying and harassment in the organisation, then they are certainly not the ones who are doing it.

• Front-line staff (and perhaps including supervisors)

The difficulty of taking staff out of the workplace for training puts a pressure on training managers to ensure the programme content is 'spot on', meaningful and crucially relevant to staff. Therefore, where staff are working under a strong pressure from managers and supervisors, where there does seem to be a feeling of demoralisation, and where relationships with those 'higher up' are fragmented, you might feel that the main thrust of your programme for them is:

Sections 1 and 2: to allow staff permission to talk about their experiences in the workplace and to recognise that it is not acceptable.

Section 4: to allow staff to consider and rehearse individual and collective responses to bullying and harassment.

Sections 7 to 9: to ensure that nothing is 'swept under the carpet' or left unsaid and not dealt with.

As you become more adept with the materials, you will find that your programmes evolve with a shape which you have given them, reflecting your understanding and awareness of what your workplace is really like.

Notes to Presenters

Being able to produce positive learning events involves a set of skills. This manual is not geared towards helping those skills, and so I am assuming that you will have those basics under your belt. What the manual does do is to provide a foundation of knowledge about the subject matter interspersed with suggested training or classroom activities and accompanied by additional materials that can be used as handouts and/or the basis of making a presentation (see the notes above about photocopying entitlements and the availability of a Powerpoint file). For this manual to be successful in doing what it sets out to do, it must do certain things:

1. It must not just be words alone, but must be rooted in practice. The participants must be able to feel the relevance of the ideas and activities to their day-to-day jobs. Over many years the author has worked with frontline staff and managers in many organisations, and this manual is a distillation of that experience.
2. While presenting as a 'foundation' programme for staff at all levels, the manual must also stimulate the participant to want more, particularly about their respective roles and responsibilities. It must feel like an invitation to further development.
3. It must speak to the sceptic as well as the seeker of new knowledge, because, at the end of the day, the sceptic is part of the organisation or team also.
4. It must give the presenter access to the significant source material as well as highlight the ideas and issues central to working in organisations where there may be bullying and harassment that isn't managed.
5. It must make the presenter's task as trouble free but as effective as possible. While introducing the presenter to the 'road map' with all the significant contours clearly described and signposted, it must offer the flexibility for the presenter to lead participants off the main road into byways of significance to them.
6. Recognising that the programme may be used in a variety of ways, it is presented as twelve free-standing sections. Obviously, for some staff, some modules will be more important than others. The modules have been designed in such a way that varying amounts of time can be given to them if desired; e.g. managers could usefully study the sections dealing with, say, the law, policies and procedures and good management practice during a half-day or full-day seminar, while spending less time on others.
7. The free-standing nature of the sections was seen to be necessary also in that, with the best will in the world, not all staff are going to be able to work through modules one to twelve without interruption. Sick leave, holidays and specific interests, we feel, should not prejudice any member of staff. Missing a section is therefore not the end of the world!

8. For optimum usefulness, the programme contained within this manual must be able to be delivered in as no-fuss a way as possible. All that the trainer needs, in addition to the manual, is a projector and a flip chart.

9. We have made the assumption that this programme will be delivered in a variety of settings, some less conducive to groupwork than others. Therefore most of the suggested activities centre around discussion that can take place either in breakout rooms where that luxury exists or in pairs where the participants are already seated with nowhere else to go.

10. We have prepared a set of over 50 presentation slides that can be printed out on paper as handouts or projected on a screen. Of course this does not preclude the imaginative presenter preparing his or her own as it is now so easy with modern office technology. We were particularly keen to include reference on the slides to all the substantive information and ideas that the presenter would wish access to in the training situation. It is for this reason that some of the slides may appear too 'wordy' or 'busy'. Please feel free to change, modify, split up, etc. In fact, we positively encourage it.

11. Above all, central to the design of this manual is our belief that it will be most effective if you, the presenter, can impose yourself upon it so that it becomes yours – and it is therefore yourself that you are sharing with the participants.

We hope that we have succeeded in doing this. And above all, we hope that you will enjoy using this manual and find it of benefit.

Reassurance

Very few people consider themselves 'experts' on bullying and harassment, but yet many people, probably including yourself, know quite a bit but possibly don't know how much you know. The programme capitalises on this fact. It has been designed in such a way that you will have no problem delivering it because it supports and supplements the knowledge you have gained from everyday practical experience. Be reassured, therefore, that you will have all the 'technical' knowledge at your fingertips to enable an effective and more than competent presentation. We have gone out of our way to ensure that you will feel the confidence of having, in these pages, far more material than you will require in your training.

The likelihood is that you have some experience, knowledge and interest in 'training'. It is therefore possible that you may find we have gone 'over the top' from time to time, for example presenting ideas for activities that you would have easily thought of for yourself. Please forgive us – we are assuming that some presenters will have little experience of presenting training sessions and will be viewing the prospect with some anxiety, if not trepidation. If you happen to be in this latter category, again, please be reassured; there is more than sufficient information and more than enough suggestions to support your ambition of making effective and enjoyable presentations.

Using the Training Manual

This manual has been designed so that all the material to be conveyed to participants, as well as in the main text, is also on one of the handouts and/or presentation slides (see p. vii for information about photocopying rights and the availability of the presentation slides in a Powerpoint file). Therefore presenters do not need to 'learn' the material verbatim, only to understand it: the gist of it will always be available to participants and as a prompt for the trainer: the presenter need never be lost for words.

Activity

Some activities, mainly of the reflective type, are suggested in each module on the basis that learning involves thinking and doing. We anticipate that presenters will supplement our suggestions with their own ideas, based on their experience of the participants, the jobs they do and the difficulties they face.

Why Bother?

Bullying and harassment are by no means new problems. However, as already noted, they have come to prominence in recent years. This is partly due to the implementation of the Protection from Harassment Act 1997 (see Section Three for a more detailed discussion of the law relating to bullying and harassment).

However, there are also other factors that need to be taken into consideration. A central theme of this book is the argument that bullying and harassment are in part at least symptomatic of a failure of leadership. That is, it is our view that the need to place staff under such undue pressure reflects an inability or unwillingness on the part of some managers and staff to exert their influence through more legitimate means. We can see, therefore, that one very good reason to tackle bullying and harassment is that they arise partly at least as a result of a skill deficit within the organisation concerned, a deficit that generally can and should be addressed through training, supervision and appraisal.

Another sense in which bullying and harassment reflects a failure of leadership is at the broader level of the organisation overall. That is, it is not just individual bullies or harassers who are showing a lack of leadership skill and understanding, it is also the managers of the organisation as a whole who are not ensuring that the work environment is a safe one, free from bullying and harassment. As we shall see in Section Three, employers are liable for the bullying and harassing activities of their managers and staff unless they can show that they have taken all reasonable practicable steps to prevent such behaviour.

Of course, a lack of effective and appropriate leadership is not the only factor underpinning bullying and harassment. At least two further issues can be identified, both of which are significant problems that organisations need to address and resolve:

i) Malice

Bullying and harassment can easily arise as a result of malice on the part of an individual, usually someone in a position of power or authority. This may be as a result of jealousy, a grudge against the 'victim', dating back to an earlier conflict or grievance, or a reflection of the perpetrator's abuse of power – taking pleasure or gaining self-esteem in being able to use his or her power inappropriately.

ii) Discrimination

Harassment often follows the 'fault lines' of society. That is, it is often particular groups in society, those more likely to be exposed to discrimination, who experience more than their fair share of harassment – racial harassment, sexual harassment and so on.

Both of these will be discussed in more detail, but for present purposes, we can see that each of these is a problem worthy of attention. Consider the following two examples overleaf:

Case Spotlight 1.1.

Malcolm was a very committed member of his church and a number of local community organisations. He was well respected as someone with a heart of gold and a lot of time and energy to devote to good causes. His boss, Philip, by contrast, had never become involved in church or community activities, preferring to reserve his spare time for the golf course. He therefore found the considerable respect and good will towards Malcolm quite irritating and was clearly quite jealous of the fact that a member of his staff seemed to be more highly respected than he was. Unfortunately, however, Philip did not keep his jealousy to himself and used his negative feelings towards Malcolm to justify being quite aggressive towards him and unduly demanding in terms of the quantity and quality of work he expected of him. He worked very hard to make Malcolm's life a misery, abusing his power over him as a result of the jealousy and irritation he felt.

Case Spotlight 1.2.

Zandra was not the only black woman in the organisation but she was very much in the minority. She worked very hard and was very eager to please. However, to her great distress, she found that, whatever she did, it was not good enough. There was always someone who would criticise what she did. She felt trapped, knowing that her white colleagues, particularly her male colleagues, were not subjected to anywhere near as much critical scrutiny as she was. It was as if she was expected to produce low-quality work, and so people were ready to find fault even when none was present. She found this pressure quite intense, and although she realised just how unfair it was, she felt powerless to do anything about it, as she was aware of how this situation reflected the broader picture of society, with its unhelpful and insidious images and stereotypes of black people, and particularly of women.