

# Leader Bullying Through a Different Lens

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## Abstract

An interpretation of bullying as a set of defensive values and strategies is established via the use of two scenario case studies. The origins of defensiveness are explored alongside introduction to a holistic evidence-based learning (HEBL) model based on an organizational learning, productive set of values and strategies, to overcome this problem in a way that contributes to a learning organization. A legal opinion about case law associated with bullying confirms the appropriateness of such organizational learning approaches to address this problem and avoid litigation. The extensive literature about defensiveness and organizational learning has not been previously widely considered in association with bullying behaviors. This conceptual article is intended to stimulate further interest to make the link between defensiveness and bullying behaviors.

## Keywords

leader bullying, defensiveness, productive approach, organizational learning

## Introduction

Bullying at work, a severe form of anti-social behaviour, has become an issue of major concern to workers, organizations, unions and governments. It has also received considerable attention in organizational behaviour and human resource management research over the past 20+ years.

O'Driscoll et al. (2011, p. 390)

At the root of my concern about the use of the term *bullying* is that the term is relatively superficially understood and bullying actions are difficult to pinpoint and examine, and even more difficult to address—particularly bullying conducted by leaders. In this article, I focus on each of these concerns. No attempt is made to deeply examine the wide international research from the perspective of psychological or organizational outcomes associated with the topic of bullying from authors such as Bowling and Beehr (2006), Sheehan and Griffiths (2011), Nielsen, Matthiesen, and Einarsen (2010), or bullying from varied levels in the hierarchy (Wallace, Johnston, & Trenberth, 2010). Instead, like those of Van Rooyen and McCormack (2013) and Jenkins, Winefield, and Sarris (2011), to some degree, this article does include an attempt to pinpoint bullying by reporting employee perceptions and also considers how bullying behavior emerges within the social dynamics of a workplace (Klein & Martin, 2011).

The pinpointing of bullying occurs by viewing behaviors through a reasonably high resolution lens: a lens illuminating bullying as a set of defensive (i.e., control and, or, avoidance) strategies and values perpetrated by leaders and managers

(from here on, the term *leader* is used to encompass both terms). The advantage of this alternate view is the association with a concrete approach to objectively identify, examine, and analyze bullying behavior. The defensive lens also provides ideas on how to address the behavior.

After briefly defining and contextualizing bullying (particularly within the Canadian and New Zealand contexts), theorizing of the defensive lens is followed by a review of approaches to overcome defensiveness and bullying. Specific note is made of approaches that are productive and have a learning organization orientation. In the theoretical section of the article, my role is outlined for the implementation of organizational learning strategies to address bullying through elaboration of a holistic evidence-based learning (HEBL) model.

Two authentic scenarios of leaders accused of bullying are used to illustrate the way the HEBL model has been adopted, particularly the use of analysis through a defensive lens. Both overt leader behaviors and behaviors that are more covert and manipulative are revealed. Regardless of whether overt or covert, these defensive behaviors are shown to have much the same affect regarding lowering staff morale and frustration, as well as reducing individual and organizational performance. Finally in this article, a legal opinion is offered

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on consideration of bullying through a defensive lens and the ways to overcome it via organizational learning.

### Defining and Contextualizing Bullying

In Canada, the concepts of bullying and psychological harassment are often used interchangeably. Those two concepts must also be distinguished from harassment generally, which is protected under the human rights codes across the country. A useful way to understand the concepts is to locate them under the larger category of workplace violence, defined by the International Labour Organization and referred to by the Canada Safety Council as “. . . incidents where persons are abused, threatened or assaulted in circumstances related to their work, involving an explicit or implicit challenge to their safety, well-being or health” (Hoel, Sparks, & Cooper, 2001, p. 14). The category of workplace violence captures all forms of harassment, bullying, and physical violence.

Many definitions exist for psychological harassment and bullying (hereafter referred to by the single term, *bullying*). Goncalves (2007), relying on the Canadian Centre for Occupational Health and Safety definition, stated that bullying represents an attempt by one person to assert control and exercise power through the humiliation or harassment of another. Bullying often denotes intimidatory behavior, which is inappropriate and has occurred over a period often designated as 6 months or longer. The behavior can be covert (the more common and of more significant psychological affect) or overt according to Baron, Newman, and Geddes (1999). An example of both covert and overt behaviors is evident in the workplace policy about bullying and harassment in a public university, which notes verbal aggression or insults, calling someone derogatory names, harmful hazing or initiation practices, vandalizing personal belongings, and spreading malicious rumors (Public University, 2013).

Bullying includes destructive and demeaning behaviors that can be difficult to see and identify and is more prevalent than other harassing behavior (e.g., sexual harassment and racial discrimination) proscribed by human rights codes (Canadian Safety Council, 2015). Furthermore, physical violence is often reported from outside sources, such as customers, students, and patients, whereas psychological violence of the bullying type is more often reported from within the organization.

In Canada, bullying typically is not fully covered in the human rights codes. Recourse and remedies for bullying must be obtained through employer policies and provisions in collective agreements. Although some provinces have legislated recourse for psychological harassment, that recourse is usually only available for instances of physical threats or acts. However, the province of Quebec has legislated protection for psychological harassment, and a similar view exists in New Zealand. Wallace et al. (2010) noted that although the responsibility is with the organization to ensure the safety

and well-being of employees, employers are liable for prosecution if they do not take preventive measures to minimize workplace stress and fatigue, or create a climate conducive to, or causing, stress.

To identify the elements that constitute bullying, Goncalves (2007) viewed these as behaviors that are recurring and persistent, obvious or subtle, not restricted to enumerated grounds, and identified through emotional effects. The damage from bullying behavior at a personal level was summarized by Wallace et al. (2010) to cover loss of self-esteem, diminished physical and emotional health, and cognitive functioning to those bullied. Bullying also affects families of those bullied as well as those who witness workplace bullying. Furthermore, the loss of productivity to organizations and society is profound when considering loss of performance and staff turnover (Greenberg & Scott, 1996) to the extent that Beswick, Gore, and Palferman (2006) estimated that bullying-related stress may cost U.K. employers 370 to 740 million pounds per year.

Bullying by leaders has become a predominant and increasing concern (Mee Kwan, Tuckey, & Dollard, 2014; O’Driscoll et al., 2011; Rayner, Hoel, & Cooper, 2002; Salin, 2003; Wallace et al., 2010) and the terms *workplace bullying* and *leader bullying*, in my consulting experience with hundreds of organizations, are considerably feared by many leaders themselves. Bullying, for these leaders, has frequently become associated with possible consequences for leaders, from reputational slurs through to formal investigations of behavior, litigation, and potential loss of career.

I have observed that leaders accused of bullying, and the chief executives (CEs) trying to resolve the accusations, have felt overwhelmingly helpless about how to deal with such claims because both those accused and leaders often find bullying a nebulous notion—a situation not helped by the lack of research on how to deal with bullying noted by Mikkelsen, Hogh, and Puggard (2011). Also observed, and noted by Bryant, Buttigieg, and Hanley (2009), is that sometimes CEs in this situation of helplessness have minimized the bullying complaints and have adopted a compliance rather than preventive approach to dealing with bullying behavior. Such minimizing is at odds with a call for management commitment (Vartia & Leka, 2011). The minimizing is also at odds with my adoption of an approach used for identifying, analyzing, and addressing bullying, which is objective and diagnostic, emphasizes high ownership by those accused of bullying, while aiming to be supportive and developmental with an underpinning organizational learning stance. Central to this approach is the adoption of a view of bullying through a defensive lens.

### Bullying Through a Defensive Lens

Dick and Dalmau (1999) summarized defensiveness as rooted in “. . . adversarial and competitive . . .” (p. 47) values. At a deeper level, Argyris (2003) described that defensiveness is

derived from a tendency to protect ourselves and others from potential threat and embarrassment. Competitiveness, self-protection, and protecting others are manifest in strategies such as

... covering up or withholding vital information or evidence, bypassing threatening conversations, and being indirect by giving mixed rather than clear messages. These strategies of defensiveness are generally summarized under categories of avoidance and control (striving to win) ... they are at the root of misunderstandings, distortions and misinterpretations. (Piggot-Irvine, 2012, p. 97)

Covering up, withholding and blocking information, bypassing (and gatekeeping), indirectness, and providing mixed messages are all evident at what could be described as a more subtle level of defensiveness in bullying cases that I have experienced. Evident also have been less subtle strategies such as outright tyranny, deceit, threat, and oppression. Whether subtle or overt, unilateral decision-making predominates in defensive behaviors, and further unpacking reveals avoidance and control underpinnings (Argyris, 2003; Cardno, 2001; Dick & Dalmau, 1999; Piggot-Irvine, 2012).

Unfortunately, defensiveness among leaders prevails. As Bifano (1989) suggested several years before workplace bullying or leader bullying were catchphrases, “Grounded in over a decade of research that was conducted in all types of settings ... Argyris and Schön concluded that defensive behaviour is the predominant ... orientation” (p. 60). Nothing suggests that this orientation has changed—Only the terminology of bullying has changed.

Multiple affects on staff resulting from defensiveness are also linked to bullying, including poor performance, low morale, burnout, and low trust. These influences resonate with the findings of a large-scale survey of staff, which indicated to O’Driscoll et al. (2011) that bullying “... was significantly correlated with higher levels of strain, reduced well-being, reduced commitment to their organization, and lower self-rated performance” (p. 309). The results of bullying work against the creation of a learning organization if these strategies prevail because they are damaging for the leader, their staff, the organization, clients, and society.

### Approaches to Overcoming Defensiveness (and Bullying)

Strategies for overcoming defensiveness, and bullying, often fall under an organizational learning approach. Organizational learning occurs when the source of problems can be discovered and addressed (Boreham & Morgan, 2004; Senge et al., 2000; Sun & Scott, 2003). In Argyris’s (1977) terms, organizational learning is a “... process of detecting and correcting error. Error is for our purposes any feature of knowledge or knowing that inhibits learning” (p. 116). Organizational learning leads to a learning organization in which, as Hodgkinson

(2000) noted, there exists a “... coming together of individuals to enable them to support and encourage one another’s learning, which will in the longer term be of benefit to the organization” (p. 157).

Overcoming defensive bullying via the employment of organizational learning strategies first requires *understanding* of both the roots of threat and self-protection and also includes the challenge of *shifting* such defensive strategies. Because defensiveness is largely seen as a set of conditioned behaviors learned and well established in early childhood years, unfortunately, such behaviors are hard to change in adulthood because they are usually well rehearsed and quite deeply embedded.

#### Shifting a defensive bullying response

... requires significant, profound, shifts involving exposure, examination and alteration of defensive values at a deeply personal level which is both cognitively and emotionally difficult and is a lengthy process. ... the approach on its own is extremely complex and usually involves months, maybe years, of training. The reason for this is that the approach requires rethinking and altering our underlying value systems, and this involves changing many automatic, conditioned responses. Such values and responses cannot be changed in two hours! (Piggot-Irvine & Doyle, 2010, p. 61)

Edmondson (1996) emphasized the intensity of behavior and value shifting required to overcome defensiveness and suggested that this involved “profound attentiveness” (p. 585). Altering values and responses also needs a high degree of self-honesty on the part of those wanting to change (Dick & Dalmau, 1999). Such change is possible, and I have seen considerable alteration of defensive bullying behavior when leaders have been willing to learn new approaches that target shifting defensive values and strategies to what are often described as productive approaches in the organizational learning field (Argyris, 2003).

Essentially, adopting productive values and strategies involves openness to sharing ideas and, equally, inquiring into and receiving ideas of others. Adopting these values and strategies necessitates working more collaboratively and consensually in decision making because a fundamental goal is to understand others’ views. Valuing evidence and data from all perspectives when making decisions and withholding assumptions until those data are checked by all involved is also important. Any prejudgment and jumping to premature conclusions are minimized in a productive approach. Such an approach presupposes a need to be open to challenge by others without getting highly defensive in response. Working *with* rather than *over* staff is important here and that includes engaging them in finding their own solutions when confronted with problems but doing so in a way that is supportive. Treating staff fairly and consistently is also a feature of a productive approach.

In summary, using values of honesty, openness, authenticity, and being non-judgmental, democratic, rigorous, and respectful underpin the strategies used in such an organizational learning

**Table 1.** Values and Strategies of Productive Leadership.

Values	Strategies
Honesty	Open to sharing our own ideas (advocacy)
Openness	Requesting and receiving ideas of others (inquiry)
Authenticity	Seeking to understand others' views
Non-judgmental	Valuing evidence and data from all perspectives
Democracy	Withholding assumptions until those data are checked by all
Rigor	Avoiding prejudgment and jumping to premature conclusions
Respect	Being open to challenge by others without getting highly defensive Working with rather than over staff Collaborative and consensual in decision making Engaging staff in finding their own solutions Treating staff fairly and consistently

approach. In a previous publication, I have shown that collectively, these values and strategies (as summarized in Table 1) can combine to result in higher trust between leaders and staff (Piggot-Irvine & Doyle, 2010).

The values and strategies outlined in Table 1 align with two of the four organizational responses identified by O'Driscoll et al. (2011) as those effective in addressing bullying: encouraging open and respectful communication, and encouraging appropriate interactions between staff. O'Driscoll et al. described the responses more at a level of underpinning values but did not elaborate on the detail of the specific strategies associated with *how* to be open or respectful. The right-hand side of Table 1 begins this elaboration.

The full complexity of the specific strategies and development protocols involved in learning to become a productive leader are too profound to outline in detail in this article (see Piggot-Irvine, 2012, for such detail). Briefly, learning a productive approach almost always engages multiple iterative cycles of development to enhance skills and strategies for recognizing and overcoming defensiveness and for incorporating productive approaches such as staying low on the ladder of inference, balancing inquiry and advocacy approaches in dialogue when working with staff, sharing rather than withholding information and reasoning, and creating bilateral solutions. Such learning is reinforced with continuing skill implementation alongside further analysis and reflection to ensure that non-defensive practices are deployed.

Most importantly, the learning approach outlined needs to be holistic regarding extending beyond the individual leader to the team and organizational levels. This holistic approach is intentional and aligns with a philosophy that attempting to change the bullying behavior of the individual leader, or

reacting in response solely to the target (Namie & Namie, 2003), alone is insufficient for the organization.

In the HEBL model developed to address bullying in a productive and holistic way, there are six steps for learning. The steps, outlined on the right side in Table 2, constitute an expansion of an original process for overcoming defensive behaviors suggested by Argyris (1990), and later elaborated by Argyris and Schön (1974). In the left column, a descriptor is provided for the roles the facilitator (or consultant) plays in these steps.

To elaborate the HEBL model a little further, each role and step is described. First, the facilitator works with senior executives in the organization to clarify the specific behaviors associated with what has been considered to be bullying by a leader. Clarification usually includes gathering specific feedback from the CE and staff and summarizing the feedback under the headings of *leader behaviors* and *affects*. In my experience, CEs struggle to determine which behaviors constitute bullying and which do not, and this first clarification step is critical to creating objectivity.

The second role played by the facilitator is somewhat akin to a counselor with the accused bullying leaders themselves. The facilitator shares the summarized *leader behaviors* and *affects* with the accused, allows them time to reflect on these, and responds to any questions they have. The accused leaders are usually dealing with extreme stress and anxiety, and addressing that through a range of counseling type tools is an initial focus.

Once the stress is reduced, the third role played by the facilitator is to confront the issues (note that this does not imply a confrontational style) by guiding the accused leaders to analyze *their* perception of the type of behavior that predominates and understand its origins.

The fourth role is intimately and intensely developmental where the facilitator guides the accused to learn new, more productive, non-defensive, non-bullying ways to work with their staff. The learning is heavily interspersed with continual practice, followed by analysis and self- and shared reflection with the facilitator. The leaders are encouraged to journal their reflections throughout.

The fifth role played is a broader developmental one with all staff that often happens in tandem with the one-to-one work with the accused bullying leaders. Here, the facilitator conducts theory-informed yet experientially based sessions with teams to identify and overcome bullying behavior at all levels in the organization. The sessions (1 to 2 days in length) cover identification of defensive bullying responses, theoretical underpinnings, and approaches to overcoming defensiveness and dealing with conflict in productive ways.

Sixth, and most important, is the adoption of a role of raising awareness of the importance of senior leadership taking a systems-wide perspective on addressing bullying. The facilitator usually works to ensure that senior leaders are aware that creating highly effective systems and structures within the entire organization is an important precursor to

**Table 2.** HEBL Model for Dealing With Bullying.

Roles	Approach steps
1. Clarifier	Gathering specific feedback from the senior leadership and staff to summarize leadership behaviors and affects
2. Counselor	Counseling the accused bullying leader to deal with stress and anxiety when they see the accusations outlined in the feedback
3. Confronter	Confronting the issues (note that this does not imply a confrontational style) by guiding the accused leaders in analyzing <i>their</i> perception of the type of behavior that predominates and understanding its origins. Prioritizing target areas for development, with a focus on few tasks done well
4. Personal developer	Intimate and intensive development with the accused in learning non-defensive, non-bullying approaches. Learning, continual practice, analysis, and reflection (and diarying) occur iteratively
5. Organizational developer	Learning development with all staff in identification and overcoming bullying behavior at all levels in the organization
6. Systems developer	Raising awareness of importance of senior leadership taking a systems-wide, preventive perspective on addressing stress and consequently, bullying

Note. HEBL = holistic evidence-based learning.

lowering leader stress and consequently enhancing more positive approaches for leaders interacting with their staff.

The HEBL model includes several of the stimulating factors for interventions to address bullying summarized from previous literature by Mikkelsen et al. (2011). The model adopts a stepwise and systematic approach, implements measures that fit in with the targeted problems, has a participative approach, has the sustained commitment of top management, attempts to build trustful relationships between the organization and consultant (or researcher), and attempts to develop an organizational culture that is able to use constructive conflict to overcome disagreements and resistance.

Two scenarios of leaders accused of bullying are used to briefly introduce the first two roles played and the steps in this learning-oriented model. More extensive illustration and elaboration of the third of the roles and steps are provided.

## Background and Scenarios

Before discussing the scenarios, I note that the history of my relationship with the public sector organization was extensive (more than 10 years) with incremental trust establishment a feature of the history. The process in which that trust was developed could be the feature of another article, but

suffice to say that trust was based on employment of a strong emphasis on practicing non-defensive values and strategies such as collaboration and understanding of the organization culture that enabled employment interventions that were fully discussed with the CE and considered appropriate. Trust was not ostensibly limited in this context in the way that it could have created an obstruction (Mikkelsen et al., 2011): an obstruction I have experienced in other contexts where I have not had the privilege of such a long-term relationship.

The two middle level leaders accused of bullying behavior used in the following scenarios were in what might be described as third tier, that is, just below the CE (first tier) and senior leadership (second tier) levels. Each had teams of up to 25 staff working for them. To ensure anonymity in the scenarios, the sector will not be identified other than to say it was a public service organization of approximately 300 staff. In both scenarios (which were approximately 6 months apart), I was called in when the CE had received considerable written and verbal negative feedback from staff of each leader that was quickly followed by accusations of bullying. The CE had struggled to distinguish whether a situation of bullying existed or not.

The earlier described first HEBL role was initially implemented with these scenarios. As facilitator, I acted as advisor to the CE to assist with objectively *clarifying* the strategies that each leader was implementing. Clarification was achieved by asking the CE to discern his own feedback and the staff feedback on the accused *leader behaviors* and the possible *affects* of those behaviors. Tables 3 and 4 represent the summary statements made by the CE and staff. As the facilitator, I avoided editing or analysis of the feedback because the feedback was to be used subsequently to ensure high levels of ownership with the two accused.

## Confronting and Analyzing the Behaviors and Affects

Once the CE had *clarified* the *leader behaviors* and *affects*, the next roles played in this bullying accusation involved working with the two accused leaders themselves. The process began by presenting the leaders with the feedback as shown in Tables 3 and 4, and ensuring the leaders had time to reflect on this feedback and to ask any questions about the information. Initially, considerable time was needed to allow the leaders to resolve some of their stress about the accusations (Role 2 in the HEBL model). This delicate, almost counseling, element is not the focus of this article, although counseling is a critical element. In summary, good listening, clarifying, and reflecting *counseling* skills were used.

Work with the leaders in the third HEBL role was in *confronting* the issues by guiding the accused leaders to use a defensive lens to unpack and analyze the behaviors that others had summarized. They were asked to analyze the behaviors as either controlling (C) strategies or avoiding (A), or a

**Table 3.** Scenario 1.

Leader behaviors	Affects
Allocating work to staff late with little time frame to complete (A/C)	Work deteriorated
Work submitted by due date by staff but then sat in leader in-tray for over a week awaiting proofreading with result of a deadline for a client being missed (A/C)	Seen as deliberate procrastination with outcome of loss of respect by client
Would not delegate to others in her absence (C)	Unwillingness to trust others
Team discussed and recorded, on multiple occasions, the impacts of the leader not allocating or checking work in a timely manner. Amended and removed from minutes by leader (C)	Mistrust of leader: Discussion not open
No leader support, guidance, for managing difficult tasks, serious issues (A)	Difficult tasks bypassed and support for staff diminished
Gave incorrect information to her CEO about what was happening. Heard to state to CEO: "We have done . . ." frequently and gave incorrect information when she had no involvement (C)	Inaccurate information passed on that later needed to be corrected
Staff completed work for the leader, which she then put her name to (C)	Staff mistrust and frustration
Team had no team meeting or work information for 7 weeks (A/C)	Uninformed staff
Important information treated by leader like it was embargoed (C)	Low sharing of information
When meetings resumed, it was more like a training session, no discussion (C)	Low ownership
Frequent unavailability for fortnightly coaching sessions with line managers (A)	Own management staff not supported and their development hindered
Advised staff that they were unable to apply for any secondment opportunities and she would not support their application (C)	Low support for staff
No feedback to staff about their work or personal development (A/C)	Poor feedback, low morale
Leader focused on activities that were visible to senior management. Staff not involved received little focus (A/C)	Leader only working to demonstrate her capability to senior management
A new staff member asked for training (4 months after she started) in a group meeting. Leader ignored the person (A/C)	Poor morale, staff not supported
When staff asked about working different hours, she stated there was no flexibility (A/C)	Incorrect information provided
Staff waiting for up to 6 weeks for reimbursement for expenses as she did not sign off the form in a timely manner (A/C)	Mistrust of leader and organization
Went through staff desk material after closure to find information to support her argument on an issue (C)	Secretive behavior. Trying to catch staff out
When a staff member approaches her about concerns, she just sits in silence. She makes a final comment like "that's what you get paid to do" (A/C)	Staff frustration and helplessness. Low staff morale. Possible staff burnout or overload

Note. A/C = combination of controlling and avoiding strategies; C = controlling strategies; A = avoiding strategies.

combination of both (A/C), as shown in Tables 3 and 4. The accused leaders (like most people) found it difficult to easily distinguish avoidance and control, with frequent A/C combined categorization shown in the two tables. To demonstrate such blurring, the first example of categorization of A/C from Table 3 is provided. Here, the description of *leader behavior* notes,

Work submitted by due date by staff but then sat in leader in-tray for over a week awaiting proofreading with result of a deadline for a client being missed. (A/C)

Note that this behavior is reported in the *affect* column as "Seen as deliberate procrastination with outcome of loss of respect by client." The word *deliberate* is important here. If the behavior is viewed as deliberate, a likelihood exists that the leader's subtle avoidance strategy could be quite manipulative control in disguise. Such subtlety is not lost on the staff and, in my experience, is often perceived as more damaging than outright control. As one employee stated, "I would rather have the knife put in from the front than deviously

from behind. At least I can see the knife coming when it's in front of me!" To reiterate the point, avoidance can be a devious and dangerous form of control. The A/C categorization used in the tables indicates that control—although subtle—is evident.

Following the analysis of behaviors, the accused leaders drew up a summary of the important strategies that they considered they had been using, as represented in Table 5.

The Table 5 summary indicates a picture of defensive behavior with some strategies overlapping and others not. The leader in Scenario 2 is a more typical example of overt controlling strategies: The leader in Scenario 1 has a more manipulative style. In both scenarios, multiple examples exist of covering up and withholding and blocking information, bypassing (and gatekeeping), indirectness, and providing mixed messages. Examples are also evident of outright tyranny, threat, and oppression more overtly shown in Scenario 2. Unilateral decision-making predominates for both of the leaders, although again more overtly in Scenario 2, as do alienation of staff, deceit, and inconsistency. Misunderstandings, distortions, and misinterpretations are

**Table 4.** Scenario 2.

Leader behaviors	Affects
Strict management of leave requests and high level of scrutiny on leave (C)	Staff reluctant to take leave
Long staff supervision sessions involving mostly the leader talking about his own objectives or talking at staff. Sessions not collaborative (C)	Staff not developing. Became passive in sessions so that they would end sooner
Dominating or controlling conversation in team meetings. Long team meetings dependent on what the leader brought to the meeting (C)	Staff became passive in meetings and felt excluded from decision-making process
Closed office door and in office for long periods of time alone or avoidance of being in office during work hours. Taking long breaks in middle of day then working late outside of hours (A/C)	Deliberate avoidance of engaging with team
Becoming emotional when challenged. Challenges or questioning by staff seen as personal attack on leader's integrity (A/C)	Made staff feel guilty so less inclined to raise issues in the future
Process for staff advancement through structured development system slowed down (C)	Process became too difficult for staff and advancement was blocked.
Certain staff had excessive supervision or monitoring of their work. Sometimes the same piece of work was checked multiple times with different corrections added each time (C)	Some staff fearful of submitting work: Some worked extra hours to achieve reach standards
Staff seen as incapable had work responsibilities gradually removed. Those seen as competent had responsibilities increased (C)	Staff confidence damaged. Some staff became overloaded or pressured
Staff had basic tasks explained to them in a belittling manner (C)	Lowered staff confidence
Concerns raised by staff not listened to or acted on (A/C)	Low confidence in concerns being addressed
Staff discouraged from seeking promotion or advancement. This was done through disparaging comments or comments indicating that other staff had been lined up for that role already, so there was no point applying (C)	Low staff motivation for applying for positions
Work demands or deadlines were unrealistic. When concerns raised, they were shut down by the leader (C)	Staff worked harder and stopped raising concerns. Increased stress and sick leave
Leader would frequently raise hand (stop gesture) when staff were speaking and the conversation was taking a direction he did not like (C)	Staff felt controlled and stopped raising concerns
Leader making decisions without team or those affected. Team were spoken to individually about decisions (A/C)	Low ownership and morale. No logic seen in decisions
Leave applications were approved and later revoked. Staff subsequently pressured to cover for each other, or else another staff members leave would not be approved (C)	Staff felt guilty and would cover staff out of obligation. High absenteeism. All staff reported symptoms of stress or pressure. Some sought medical or professional support for this

Note. C = controlling strategies; A/C = combination of controlling and avoiding strategies; A = avoiding strategies.

clearly demonstrated, as are multiple other *affects* on staff linked to poor performance, low morale, burnout, and low trust. Restricted inclusivity and collaboration with staff, limited ownership of work, lowered morale, heightened staff frustration and helplessness, and staff feelings of poor support are likely to be linked to reduced performance, low engagement, and low trust in the leader.

The defensive strategies for both leaders fall within definitions of bullying. Whether overt or covert, the avoidance and control strategies that the two leaders demonstrated are derived from deep values, and these strategies often go undetected with individuals until they are in stressed situations: situations that are common in leadership positions. I believe that these stressed situations can be exacerbated at an organizational level when poor senior leadership and dysfunctional systems and structures prevail. In other words, blame for

increased defensiveness should never be fully attributed to an individual leader. For this reason, as noted earlier in this article, striving to address issues at a more holistic level is important.

As part of the developmental work conducted with the accused leaders, I provided each with some background to defensiveness after they had analyzed the summarized *Leadership Behaviors* as avoidance, control, or combination strategies. These two leaders were no different to almost all others I have conducted similar work with. They did not need someone else to indicate what the dominant, or target, areas of concern were. They were quick to analyze those themselves and were considerably more critical than I would ever have been.

After the analysis and summary of strategies was completed, the accused leaders were guided to prioritize what

**Table 5.** Summary of Strategies by Accused Leaders.

Leader in Scenario 1	Leader in Scenario 2
Delaying processes	Deliberate procrastination
Low levels of delegation	Micro-management and high levels of scrutiny
Holding back, blocking, and screening information	Excessive supervision and monitoring
Providing inaccurate information deliberately	Domination rather than collaboration in meetings
Stealing credit for work done by others	Emotional blackmail
Blocking collaboration	Inconsistent allocation of workloads
Blocking inclusion	Deliberate unavailability
Failing to develop staff	Belittling
Deliberate removal of support	Unsupportive when problems arose
Ignoring staff	Disparaging
Alienating staff	Misleading deliberately
Inflexibility	Setting unrealistic deadlines
Secrecy and deceit	Controlling decisions
	Inconsistent overall
	Gatekeeping leave requests
	Exerting excessive work pressure

they believed they needed to address first as a defensive bullying behavior. Addressing one issue at a time has been critical to the success of improvement in addressing bullying concerns: Anything more seems to create overwhelm. In the case of the Scenario 1 leader, the focus was on attempting to be more transparent when providing information to staff. The Scenario 2 leader focused on reducing micro-management and scrutiny of staff work. The next task for the accused leaders was to carry out these improvements in the *developmental* step. In both scenarios, this development period was approximately a year, reflecting the depth of shifts in behavior needed. Throughout this development, the leaders iteratively implemented improvements and reflected on those individually as well as with me as facilitator.

Approximately 1 year after this approach was adopted with the leaders, the CE and staff were asked to provide feedback on improvements. In both cases, the feedback indicated shifts in the predominantly controlling strategies of the leaders.

## A Legal Lens on the Scenarios

In New Zealand, workplace bullying can be addressed through prosecution. As the earlier descriptions of bullying indicate, in Canada, recourse and remedies must be addressed through employer policies and, or, provisions in collective agreements. Case law in Canada, however, provides precedence for heavy penalties, as the following example legal cases indicate. In *Shah v. Xerox Canada* (2000, O.J. No. 849, QL), the employee's supervisor engaged in name-calling, insults, shouting, and angry outbursts, which were not contradicted. These contributed to employee intimidation, demeanment, and humiliation. The

judge was satisfied that no employee should have to tolerate such conduct and awarded her 2 months wages (\$Ca13,381) and \$Ca3,500 for mental distress.

In *CUPE L. 2086 v. Houston* (2008, B.C.C.A.A.A. No. 118, QL), the employee's supervisor deliberately demeaned the employee by asking him to wash his truck, telling him to come in through the back door, and undermined his role as union president by questioning why he was at the district office in front of other employees. In this case, the arbitrator ordered less punitive remedies to assist the parties to improve the workplace environment; the arbitrator ordered them to develop a harassment policy within 6 weeks, or she would impose resurrection of labor-management meetings with outside assistance and that a trouble shooter role be established to resolve grievances expeditiously.

In *Piresferreira v. Ayotte and Bell Mobility Inc.* (2008), it was found that abusive (the leader swore, raised his voice, pushed her away) treatment by a supervisor caused posttraumatic stress disorder and that the employer was liable for the supervisor's action (a point that was later appealed). The employee was awarded \$500,000 by the Supreme Court; the case was appealed, and the damages were reduced to \$148,000.

This selection of case law in Canada is indicative of increased attention to penalty associated with grievances resulting from management bullying. The types of bullying behaviors noted as intimidating, demeaning, and abusive all fit within the defensive category of control described in this article. They are behaviors exhibited individually, which profoundly influence the ability of an organization to be seen as a learning organization where individuals ". . . support and encourage one another's learning" (Hodgkinson, 2000, p. 157). In each of the cases, judgment clearly showed that such behavior is not tolerable, and in the second case of *CUPE v. Houston*, the arbitrator provided a strong message of a need to improve workplace policy and practice.

## Conclusion

The two scenarios indicate that outcomes of defensiveness and bullying work against the creation of a learning organization because they are damaging for the leader, the staff, the organization, clients, and society if these aggressive strategies prevail. Those outcomes also align with O'Driscoll et al.'s (2011) large-scale survey of staff which indicated that bullying ". . . was significantly correlated with higher levels of strain, reduced well-being, reduced commitment to their organization, and lower self-rated performance" (p. 309).

Both the scenarios and the cases cited in the legal opinion highlight that the time is overdue for organizations to take responsibility for ensuring that leader bullying is addressed if they wish to be seen as a learning organization. Such responsibility, however, goes significantly beyond the proactive suggestions raised by Van Rooyen and McCormack (2013) for training, or the awareness raising sessions that Sheehan and Griffiths (2011) referred to, or ". . . the

‘whistle-blowing’ and ‘dignity at work’ policies and a raft of mediation techniques” (p. 24) claimed as inadequate by Klein and Martin (2011). Although each of the latter approaches has merit—and they are components of the fifth and sixth steps in the HEBL model—in my experience, these elements alone do not deeply enough address bullying at the individual leader level. For this reason, the steps addressing individual development (Steps 1-4) and those that target organizational development (Steps 5-6) are required. In this way, leaders, employers, and staff can adopt the practical productive values and strategies associated with organizational learning described in this article.

If the six HEBL steps are well-practiced and embedded in the organization, in my experience, those steps can reduce the type of litigation noted earlier. More important, at a broader level, HEBL can create a culture of encouraging open and respectful communication, and strengthening interactions between staff in ways that establish sustainably productive, learning workplaces. Such culture shifting is in keeping with Sheehan and Griffiths’s (2011) conclusion: “We further contend that workplace health management, and a corporate culture based on partnership, trust and respect, offers considerable potential to move the agenda forward” (p. 10). HEBL is key to moving the culture forward.

## Limitations

This article is limited by restriction to scenarios within one organization. The scenarios, however, have highlighted factors that illustrate a link between defensiveness and bullying as well as supporting outcomes from bullying identified by multiple other authors (Baron et al., 1999; Goncalves, 2007; Mikkelsen et al., 2011; O’Driscoll et al., 2011; Vartia & Leka, 2011) and approaches for overcoming bullying (Sheehan & Griffiths, 2011; Van Rooyen & McCormack, 2013). The scenarios are also typical of more than 20 other similar sets of behaviors in accused leader bullying cases where I have intervened.

The article has a developmental focus on the intervention approach to identifying and addressing bullying rather than providing research to establish the efficacy of the HEBL model steps discussed. This could be seen as a further limitation and adds to the concern of Mikkelsen et al. (2011) that

... lack of research based knowledge on how to prevent in particular bullying at work. As such, only a few research based articles on prevention of bullying have been published in the 14 year span since ... 1996. (p. 85)

Although not specific to the context of the scenarios presented in this article, process and milieu post hoc evaluation data collection has demonstrated that behavioral shifts occurred for the employment of almost identical HEBL interventions in another context (Piggot-Irvine & Doyle, 2010). In the latter context, the approach adopted for both

process and evaluation was within a highly collaborative partnership with leadership in the organization: a pivotal element of success highlighted by Saksvik et al. (2007).

## Author’s Note

To preserve anonymity, the chief executive of this public sector organization is not named, but he is acknowledged as a contributor to the detailed information in the scenarios.

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