

Accused of workplace bullying: What happens next?

If an informal resolution can't be achieved, follow your organization's investigation protocol.

By Cynthia M. Clark, PhD, RN, ANEF, FAAN

FOR THOSE OF US committed to researching and implementing evidence-based strategies to prevent and address incivility and other aggressive behaviors in health-care, it's gratifying to see the growing body of knowledge about fostering civility and building healthy work environments. However, raising awareness about the impact of incivility and bullying presents some unique challenges. Specifically, I'm referring to recent conversations with nurses in academic and practice environments who've been accused of bullying.

Being accused of workplace bullying can be upsetting. Whether the claims are true or false, the consequences of any allegation can have far-reaching and devastating effects on a person's self-confidence, professional reputation, employment status, and financial livelihood. Individuals accused of bullying may be devastated by the complaint, feel personally attacked, and be helplessly confused about ways to effectively address the accusation. (See *Workplace bullying defined.*)

Accusations of bullying can be handled in two ways: informally or formally. If you've been accused of bullying, you'll want to know how to move forward to resolve the situation, no matter which path you take.

Addressing accusations informally

Informal procedures to address accusations of workplace bullying are optimal and should take a problem-solving approach. If you're accused of incivility or bullying behavior, try to resolve the issue as soon as possible and at the most local level (peer to peer or supervisor to employee). Acting swiftly and respectfully may prevent a formal complaint from being filed.

Consider meeting with the individual expressing concerns to address the situation and discuss how you might work together to reach a favorable resolution. Begin by finding a mutually beneficial time and place to meet where you won't be interrupted. Before the meeting begins, think about how you might have contributed to the conflict and how your actions might be perceived by others. This personal inventory will help you understand the other person's perspective. The

clearer we are about our real or perceived role in the situation, the more enlightened and empowered we are to act. Inviting a neutral party to listen in or mediate may be recommended, depending on the comfort level of each party, their agreement on who the third party should be, the level of support needed, and the severity of the accusation.



Take an interest-based approach to the meeting to help you and the other party put personal issues aside and focus on resolving the problem. Mutual interests may include a joint effort to resolve the conflict at the most local level while preserving a collegial working relationship that supports the institution's mission. Actively listen and show genuine interest in the conversa-

Workplace bullying defined

According to the Workplace Bullying Institute (WBI), workplace bullying is repeated, health-harming mistreatment of one or more persons (the targets) by one or more perpetrators. It's abusive conduct that's threatening, humiliating, or intimidating, and it interferes with a productive work environment.

Bullying often is driven by a need to control another person and includes acts of commission and omission. The WBI describes workplace bullying as akin to intimate partner violence and may include:

- verbal attacks
- threats
- spreading rumors and gossip
- public ridicule
- purposefully withholding vital information.

tion. Avoid being defensive or judgmental; although you might not agree with the other person, seek to understand. Keep an open mind, consider the message, and avoid interruptions. Allow enough time for each of you to describe your view of the issue, seek to find an interest-based solution, and make a plan for a follow-up meeting to evaluate progress on your mutual efforts. Consider taking notes or sending a follow-up e-mail summarizing the meeting and the agreed-to solutions.

The desired outcome of an informal approach is an agreed-upon set of rules of engagement, consensus about the style or method of interaction, and the restoration of productive working relationships. These agreements apply to both parties and aren't specific to the person being accused.

Addressing accusations formally

If resolving the accusation isn't successful at the local level and escalates to a formal complaint, supervisor and/or organizational intervention may be necessary. Let me illustrate by describing a scenario of a nurse manager accused of workplace bullying that required human resources (HR) involvement.

Amanda, a talented and highly skilled nurse, is the telemetry nurse manager in a large metropolitan health system. She's diligent, caring, and fiercely committed to patient safety. According to Amanda, Lucy, a staff nurse on Amanda's unit, frequently cuts corners, develops workarounds, and calls out sick. Amanda believes that Lucy's commitment to the team is suspect and that her clinical skills require substantial improvement. Amanda has met with Lucy on a regular basis to provide resources and support to help Lucy improve her work performance. Lucy is furious and instead of dealing with Amanda directly, she reports Amanda to HR, calling Amanda a bully and accusing her of contributing to a hostile work environment. The HR director suggests meeting with Amanda and Lucy together to address the situation, but Lucy refuses, claiming that she's "terrified of Amanda and her volatile temper." When Amanda is informed by HR about Lucy's complaint and refusal to meet, she's devastated, confused, and uncertain about what to do next.*

In this scenario, Amanda believes that Lucy is accusing her of bullying to deliberately sabotage her managerial efforts. What can individuals like Amanda do if they find themselves accused of bullying?

Be prepared

Although some workplace bullying accusations are legitimate, some may be questionable and stem from misunderstandings, misinterpretations, or ineffective communication—and in some cases, allegations may be brought against a manager or coworker out of revenge

or spite. Sometimes bullying allegations occur when managers are appropriately supervising underperforming employees—much like Amanda's perceived situation. As long as the actions taken by nurse managers are objective, reasonable, and well-documented, any claims of bullying should be properly vetted during the investigation. If you're a nurse manager, follow all organizational policies for supervising employees—and if accused of bullying, fully cooperate with the investigation. Reacting angrily or retaliating will only escalate the situation.

Amanda might consider collecting her documentation and adding additional notes to support her position. At the onset and throughout the investigation, she should consider investing in self-care, avoiding behaviors that might inflame the situation, and seeking support.

The investigation

A formal approach to addressing workplace bullying includes an investigation to determine the facts and credibility of the alleged complaint. As the accused, you may feel a range of emotions, including hurt, confusion, and feeling as though you have already been found guilty before an investigation even begins. But remember, creating a psychologically safe work environment is a critical organizational objective, so clear, comprehensive, and fair policies are necessary for an impartial, confidential, and reasonably paced investigation.

The investigation will begin by fully advising you of the allegations and providing you with a copy of the formal complaint. Maintain a written record of your personal observations and details of the alleged event/complaint. During the investigative interview, you may want a third party (union representative, legal counsel, or conflict negotiator) to sit in to provide support and ensure that policies are being properly enforced. Consider using written notes to refresh your recollection

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and accurately describe the events, and calmly address the facts in a professional, nonconfrontational manner. If you genuinely believe that the investigator or somebody with the power to make the final determination has a conflict of interest, detail your concerns, preferably in writing, and request that another person be involved in the process.

If Amanda perceives a lack of impartiality or believes the process has been compromised, she may ask for another investigator to be assigned or seek legal advice if she believes no other organizational personnel can assist.

Seek advice

Remember that the investigation can take time and that your level of stress may increase as time goes on. Seek support from friends, family, or a professional counselor to help you deal with the stress of the investigation.

Keep any discussion about the complaint strictly confidential. Discussing the investigation with coworkers, decision-makers, or anyone else in the workplace may be perceived as an attempt to influence potential witnesses or interfere with the investigation and may be contrary to your organization's policy. If you feel strongly about talking to someone, make sure you trust them. A neutral third party can help you understand the issues, suggest ways to address the matter with your colleague and manager, and manage your responses to the allegations. You may want to speak to an attorney since the potential consequences (job loss, financial damages) can be quite serious. An attorney can advise you as to when his or her involvement may be needed.

Amanda should stay focused, engage in self-care and stress-reduction activities, and stay connected with her support system. If she wants to engage an attorney, she can call her local state bar association to obtain a recommendation for someone who specializes in employment law and related matters.

Awareness through education

Claims of bullying or contributing to a toxic work environment can be distressing for everyone involved, and the human and financial costs to the organization are extensive. Organizations must take a proactive approach to creating a healthy, productive work environment by establishing a clear vision, mission, and shared philosophy of civility and respect; co-creating team behavior norms with clearly stated accountability measures; and providing ongoing, targeted training on workplace bullying, prevention, and consequences. Managers may re-

quire additional training to provide them with expanded management skills and simulated experiences to practice and role-play employee encounters during performance reviews, when giving and receiving constructive feedback, for resolving conflict, and when discussing disciplinary actions.

Getting back to business

Being accused of bullying or contributing to a toxic work environment can be a challenging and distressing experience, so being well-informed and well-equipped to deal with these situations is imperative for all nurses and health-care workers. If you're accused of bullying, take the complaint seriously—even if you feel it's falsely deserved. Follow your organization's protocol, don't act out of anger, and seek advice. The ultimate goal for all involved parties, including the organization, is a mutually agreeable resolution that lets everyone get back to the business of patient care.

Lucy agrees to meet with Amanda and the HR director but insists that a neutral third party be present. With a trained conflict mediator facilitating the meeting, a mutually satisfactory resolution is reached. Although Amanda and Lucy may never be friends, they agree to treat one another with respect and to put patient safety at the center of their care. They also agree to meet with the mediator in a follow-up session to assess their progress in reaching their goals.

Note: The information in this article is for informational purposes only and not for the purpose of providing legal advice. Contact your supervisor, HR representative, or attorney to obtain advice with respect to any particular issue or problem. ★

*All names are fictitious.

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