Who’s Training Whom?

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**Synopsis**

In this critical incident, Todd had just returned to his office from a HR meeting where workplace safety was the main topic. He recalled a time when he, a seasoned mainframe computer salesman, and Sam, a newly-hired salesperson whom Todd has been assigned to mentor, were on a sales trip. Todd’s job was to help Sam learn about the company. Mostly Todd was to mentor Sam in selling and even dressing appropriately for his new position with the company. They were starting a two-hour drive to Trinidad, Colorado. In an effort to be friendly and get to know Sam, Todd began by asking a simple question to which he received a rather frightening response. Todd was concerned about his safety. This relates to today’s workplace because numerous men and women who have served our country overseas are returning to the jobs they held prior to deployment and many of them are suffering from post-traumatic stress disorder.

**Research Methods**

This critical incident is a descriptive work. All of the information in the critical incident comes from the experiences of one of the authors.

**Student Learning Objectives**

After reading and studying this case, students will be able to:

1. Outline factors associated with Post-Traumatic Stress Disorder (PTSD) in the workplace and relate those to Sam’s activities. (Level 2: Comprehension)

2. Explain the relevance of the Americans with Disabilities Act to people like Sam in today’s work environment. (Level 1: Knowledge)

3. Identify and describe the appropriateness of the actions that Todd took to defuse a potential violent situation. (Level 3: Application)

4. Explain the complexity of workplace violence and identify the impact variables at all levels of system aggression. (Level 2: Comprehension and Level 3: Application)

5. (Optional) Design strategies to prevent workplace violence (Level 5: Synthesis)

**Potential Class Use**

The critical incident is best used in a human resources management class when discussing potential workplace violence and the Americans with Disabilities Act. Using this case will require that the instructor discuss post-traumatic stress disorder in advance or have students research the topic.

We believe this case is very engaging for students. Additionally, we think that the case is timely due to the increasing numbers of American service personnel returning to the United States after time served abroad in Iraq and Afghanistan.

One teaching suggestion might be to begin the case with a map of Colorado to orient students to the trip length and the exact location of these towns and cities.

**Questions**

1. Define Post-traumatic Stress Disorder (PTSD). Do Sam’s actions indicate that he may be suffering from PTSD? LO1

2. What is the main purpose of the Americans with Disabilities Act (ADA)? Do you think that Sam has a disability that qualifies under the ADA? Explain. LO2

3. What actions did Todd take to defuse a potentially volatile situation in the workplace? LO3

4. What were some of the key variables that had an impact on the interaction between Todd and Sam. LO4

5. Design strategies to prevent workplace violence. LO5

QUESTIONS WITH SUGGESTED RESPONSES

**1. How would you define PTSD in the workplace? Do Sam’s actions indicate that he may be suffering from PTSD? Why is Sam’s behavior troubling? LO1**

Mayo Clinic defines Post-Traumatic Stress Disorder (PTSD) as “a mental health condition that’s triggered by a terrifying event—either experiencing it or witnessing it” (Mayo Clinic, n.d.). Symptoms may not present until years after the traumatic event; although, symptoms may occur within three months. Symptoms are divided into four categories which include: intrusive memories, avoidance, negative changes in thinking and mood, or changes in emotional reactions (Mayo Clinic, n.d.) These symptoms cause significant problems in social or work situations and in relationships. PTSD is a reality in the work environment today and employers must be prepared to address the issue and to create a safe work environment.

PTSD is one of the few mental disorders that are triggered by a disturbing outside event and not everyone who experiences a traumatic event will develop PTSD. To be considered PTSD, and individual must have experienced a situation where he/she was afraid for his/her safety or his/her life, experienced something that made him/her feel fearful, helpless, or horror, and the symptoms must last more than one month (WebMD, n.d.). The worse the trauma, the more likely the person will develop PTSD. Research indicates that PTSD changes the biology of the brain that can be shown in magnetic resonance imaging (MRI) and positron emission tomography (PET) scans. These types of evaluation tools were not available during the time of the case.

From the case we know that Sam was a Viet Nam veteran and who knows what experiences he had there. It would be reasonable to assume that he is suffering from what is now known as PTSD. Sam displays many of the characteristics of PTSD. For example, he appears to be emotionally numb in that he speaks without emotion. Moreover, according to Sam himself, he attacked his wife with a knife during the night. This would indicate that he was dreaming about or reliving some event that had happened to him where he felt he had to defend himself. Additionally, Sam carries around a six-inch hunting knife in his boots. From his comments, one could infer that he has a sense of danger in his daily living. This behavior can be classified as unusual and potentially threatening to the people Sam works with and customers that he encounters through his job. Indeed, Sam stated that being successful in this sales job “might get just as ugly as the situation with my wife.”

**2. What is the main purpose of the Americans (Americans) with Disabilities Act (ADA)? Do you think that Sam has a disability that qualifies under the ADA? Explain. LO2**

The Americans with Disabilities Act was passed in 1990. It prohibits discrimination in employment against individuals with disabilities who can otherwise do the job (Shaller & Rosen, 1991). Any employer with 15 or more employees is covered by this act and therefore cannot discriminate against qualified individuals with regard to work conditions—application procedures, hiring, discharge, compensation, advancement, training, or other terms or conditions of employment (ADA: Simple, Common Sense Principles, 1992). The act also requires that employers make “reasonable accommodations” for employees with physical or mental limitations.

This Act is beneficial in a couple of ways. First, the Act actually increases the labor pool from which employers can select capable, qualified employees by including those with disabilities who can do the work. Another benefit is the Act gives people who are qualified but disabled the opportunity to find and get jobs. The whole psychological benefit of being employed and supporting one’s self is beneficial to society as a whole. Additionally, the positive feelings of self-worth that people with disabilities experience by being employed are a positive factor.

On March 25, 2011, the Equal Employment Opportunity Commission (EEOC) issued its regulations to implement the Americans with Disabilities Act Amendments Act of 2008 (ADAAA). This action listed examples of how certain medical conditions could limit major life activities and thereby qualify as disabilities under the act. The EEOC noted that “It should easily be concluded that the following types of impairments will, at a minimum, substantially limit the major life activities indicated” and that “”major depressive disorder, bipolar disorder, post-traumatic stress disorder, and obsessive compulsive disorder” (Radler, 2012). This sentence brings PTSD under the rubric of a physical impairment and it guarantees ADA coverage to virtually every individual diagnosed with that condition.

From the case, students should be able to determine that Sam has some kind of problem and he states as much during the drive when he says that he has been examined by a “shrink” at the VA hospital who diagnosed Sam with a disorder of some nature. In addition**,** it does not seem “normal” that a person could say that they could “kill a person silently in seven different ways.” That statement alone would give most people pause.

And finally, Sam’s comments indicate that his marriage is in disarray due to Sam’s actions. So, for all of these reasons, the authors believe that Sam fulfills the requirements of the Act and would be covered by the ADA if the situation were taking place today.

**3. What actions can an individual take to defuse a potentially volatile situation in the workplace? LO3**

The case seems to indicate that Todd is able to remain calm in tense situations and hide his apprehensions**.** Twice during the trip, Todd felt anxious and was able to calm himself. However, the most threatening was when Sam retrieved his knife from his boot, Todd simply asked to see it, and then he threw it in the trunk of his car. The CI portrays Todd as calm, although he may not have been so calm inwardly. He has been carrying on a conversation with Sam; Sam apparently felt comfortable with Todd and was opening up to him. From all appearances, Todd handled the situation appropriately.

When dealing with an angry, potentially violent employee, experts suggest some techniques to defuse the situation (Dessler, 2011, p 614).

* Make eye contact
* Give the actor your full attention
* Speak in a calm, controlled voice and create a relaxed environment
* Be open and honest
* Let the person talk and get the issue out in the open
* Ask why the person is upset
* Listen.

**4. What were some of the key variables that had an impact on the interaction between Todd and Sam? LO4**

Often when developing a situation analysis, students will focus on variables related to the individual or individuals involved and will not think beyond these variables to the ways in which the situation may also be influenced by other variables well beyond the individuals involved. For example, individual behavior exists within the context of the group or team which exists within the context of the organization, which exists within the larger context of the geographic region, industry, economy, etc. This is referred to as “levels of system aggregation.” There are no simple solutions to workplace violence. It is a complex issue potentially affected by variables at every level of system aggregation. Because of this, a socio ecological model can be a useful framework for students to use to understand how variables at each level of system aggregation may have impacted the situation in which Todd found himself.

The socio ecological model is widely used in many organizational and community settings and can be traced back to the work of Urie Bronfenbrenner. Beginning in the 1970s, Urie Bronfenbrenner developed and honed an approach that applies socio ecological models to human development. Bronfenbrenner’s model defined four major “levels of influence” in which an individual is “nested.” These levels, which were referred to as the microsystem, mesosystem, exosystem, and macrosystem, range from the interpersonal realm through macro-cultural influences (Bronfenbrenner, 1979, pages 22, 25 & 26). While Bronfenbrenner recognized the importance of an individual’s capabilities and attributes, he believed that individuals are influenced by systems at multiple levels and that these levels are interdependent. In Bronfenbrenner’s model, “the properties of the person and of the environment, the structure of the environment setting, and the processes taking place with and between them must be viewed as interdependent and analyzed in systems terms” (Bronfenbrenner, 1979, page 41).

Bronfenbrenner’s model has influenced how researchers and practitioners in many disciplines draw connections between individual behavior and social settings. It may be useful for the purposes of this analysis, to simplify the language and adapt the socio ecological system levels as follows: the Individual level which includes the pattern of skills, knowledge, abilities, and attitudes unique to the individual; the Work Group/Team level characterized by team structures, processes, and dynamics – including the role and influence of the local manager; the Organization level defined by the structures, systems, processes, and culture of the organization at large; and, finally the Macro Level which includes the sector, geographic, social, political, economic, and cultural contexts in which the organization sits. As Bronfenbrenner emphasized, while each level captures a unique perspective, the levels are interdependent and must be analyzed from a systemic perspective.

Students could be asked to brainstorm the variables that they believe had an impact on the situation and then these could be discussed and categorized using the following matrix. After the variables are identified and categorized, students could discuss interventions that would be effective at each system level. For example, at the organizational level, the development of clear policies for dress code, business travel, etc. would have been useful. At the individual level, training related to defusing conflict might be identified.

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| --- | --- | --- | --- | --- |
| **Perceived Variable** | **Individual** | **Work Group/Team** | **Organizational** | **Macro** |
| Todd made comments that might have escalated the situation | **X** |  |  |  |
| The organization did not have a policy for Todd to follow |  |  | **X** |  |
| Many individuals were returning from active duty and being quickly assimilated into organizations. | **X** |  | **X** | **X** |
| Todd and Sam’s roles as team members working together may have been unclear |  | **X** |  |  |

**5. Design strategies to prevent workplace violence. LO5**

One of the most common places for a person to become a victim of violence is the workplace. This violence has become increasingly apparent as stress levels rise and people use violence as a stress-relieving solution to a dispute. Two million cases of violence in the workplace were reported in 2010 (Atkinson, W., 2010). Also problematic is the fact that many employees do not report job-site fights out of fear. Good employees may terminate employment with an organization out of fear of violence and this same fear of violence can keep potentially good workers from applying for a job with a company that has a reputation for violence and hostility.

Experts disagree about what is or is not threatening behavior, which contributes to the problem of violence in the workplace. It is clear that fistfights, slapping, and possessing a gun or knife represents violent behavior. However,what about screaming and shouting or hitting or kicking inanimate objects? Some people would agree that all of the actions listed are evidence of violent behavior, but not of equal magnitude nor deserving of the same disciplinary action.

No organization is exempt from violence that can disrupt business, productivity and ultimately the bottom line. “Emergency planning isn’t just a function of your security department anymore—it’s at the core of your business operations” (Morton, 2012).The best protection is a workable plan in place and supported by training. Preventing workplace violence can be enhanced by following these steps to minimize violent acts:

1. Screen potential candidates for violence. Perform a thorough background check to determine past violent acts. Insist on a face-to-face interview to gauge an interviewee’s temperament.

2. Have a tough anti-violence policy. This will send a signal to all that the organization is serious about preventing workplace violence. HR, security, the company attorney and employee representatives should be involved in creating the policy. Additionally the policy should be given to each employee and each employee should sign a document that says they have read the policy. This document should be placed in each employee’s personnel file.

3. Establish a crisis management team. A crisis management team is a group of people who act as help employees know what to do in the event of a crisis. Therefore, the organization should train employees regarding ways to act in the event of a crisis. Again, HR, security, and employees should be represented on this team, in addition to senior management.

4. Train supervisors. The supervisors are the employees’ leaders and work with the employees on a daily basis. These are the people who get to know employees the best and are most likely to see abnormal or erratic behavior on the part of individual employees. Supervisors are the front line of defense for the organization against violence. Generally, people who become violent at work give some warning signs and these are the signs that supervisors must be trained to recognize.

5. Publicize your anti-violence program. Get the word out to all stakeholders about the program and the fact that the organization has a zero-tolerance for violence. The organization needs to make sure that all employees are aware of the crisis management team and how to contact team members

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