



Case Study for “Practice Delivering Tough Topics” Session

This case study involves interactions between a team and HR and allegations of bullying:

About five months ago you met with a group of visitors working on a project team. They expressed concerns about bullying behavior from their project director. As an ombuds, you helped them explore and evaluate their options, one of which was filing a formal bullying complaint with Human Resources.

This week, the same group, plus others, come to you. They share that they had filed bullying complaints with HR. They describe a lengthy process that involved talking with HR, submitting written statements and supporting documentation, but receiving little to no information from HR. They understood a bullying investigation was underway and saw that the project director was on leave, which they assumed was because of the investigation. Last week, the program director returned to the office. The visitors were surprised as they thought the bullying investigation was still ongoing. After making inquiries, the visitors were told that the project director was back, full-time in their role. No other information was given.

The visitors are upset that HR’s investigation took four-months and that they were not provided with any information or updates during that period. They don’t know the outcome (though they assume that it was determined bullying did not occur). They didn’t know the project director was coming back into a supervisory role over them. They feel betrayed by the organization and foolish for trusting HR.

Some questions for consideration as you prepare your message to leadership:

- What are the potential organizational or system-level issues? And what other data or themes might you draw on?
- What are the potential organizational risks that may be present here?
- What is the key message(s) you, as ombuds, would want to bring to leadership? How can you use some of the tools we learned earlier today in crafting that message?
- What challenges might you anticipate in delivering this feedback? How might you mitigate these challenges?

Alternative scenarios to try for the role-play – how would your message change if:

- You are talking to the head of HR, the CEO, or the organization’s general council?
- You are giving the feedback to the person who oversaw the investigation?

- You are giving the feedback to someone who was a bit “prickly” and suspicious of the Ombuds office’s motives?
- The project director was senior level and had a reputation and history of prior abrasive behaviors in several roles across the organization for several years?