

An integrated approach to evaluation for grief support in the workplace

A Compassionate Befriending Approach

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2009

Ottawa Charter for Health Promotion

- Building healthy public policy
- Creating supportive environments
- Strengthening community action
- Developing personal skills
- Re-orientating health services

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Health promotion and palliative care

- **A non-professionalised approach (rather than professionalised. It is not unprofessional.)**
- **A community response (rather than a health service response)**
- **A community development approach (bottom-up-within rather than top-down-within)**

Kellehear, A., (2005) Compassionate Cities: public health and end-of-life care.

Rosenberg, J. P. (2007) A Study of the Integration of health promotion principles and practice in palliative care organisations.

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Health promotion and palliative care

- Preventative and harm minimisation approach aimed at reducing social morbidity (rather than a clinical expert-driven approach)
- Embedded in social policies; social, emotional and spiritual responses and advice/suggestions (person-in-community approach rather than an illness/disease orientation)

[Kellehear, A., Compassionate Cities: public health and end-of-life care, 2005

Rosenberg, J. P. (2007) A Study of the Integration of health promotion principles and practice in palliative care organisations].

- Offers a framework that engages with, and responds to, diversity and complexity in health promoting ways

Background

2003-2006

Best Practice approach to workplace support (life-threatening illness and carers)

- The Reference Group comprised of leaders:
- Palliative Care representatives
(Palliative Approach & Health Promoting Palliative Care)
Prof Margaret O'Connor AM
Mr Rod Harris OAM
Rev Dr Bruce Rumbold OAM
Mrs Margaret Box
Mr Kevin Larkin
- Creative Ministries Network
Rev John Bottomley
- Project Officer
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A Compassionate Befriending approach (HPPC) - 2007

Qualitative Research design

- **Assumptions (13 identified)**
- **PICOT chart used (to bound the literature search parameters)**
PICOT(**P**opulation, **I**ntervention, **C**omparison, **O**utcome, **T**ypes of **S**tudies/Literature).
- **Inclusion & Exclusion criteria**
- **Grading levels of Qualitative studies**
- **Critical appraisal based on Evidence-Based Public Health (EBPH) criteria**

(as per Cochrane Consumers and Communication Review Group, 2006).

2007

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Literature Review findings

- **Limited evidence-based public health research on grief support in the workplace in Australia and internationally**
- **No existing public health approach to evaluation for grief support in the workplace**

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Literature Review findings

- Multiple factors affect production (related to health and well-being)
 - Absenteeism
 - Presenteeism: being at work but not functioning because of illness or injury to themselves or others

(Dewe and Compier, 2008; Chapman, 2005; Goetzel et. al, 2004, cited in Econotech, 2007).

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Literature Review findings

Recent past

In 2005-2006 'presenteeism' was estimated to cost the Australian economy \$25.7 billion, four times as much as absenteeism.

Econotech (2007) Sick at Work report commissioned by Medibank Private.

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Future

- In 2042, almost 1 in 4 Australians will be aged 65 or over with the largest increase being 85 years and over (Lumsden, 2004).

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Current

- In Australia there are around 2.4 million micro businesses (≤ 4) which accounts for around 96% of all businesses (Australian Taxation Office, 2007).

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Literature Review findings

- **Social concerns for safety, security and certainty have arisen from terrorism & corporate collapses**
- **Leadership needs to show compassion**

[Thompson (in press); Nicholls, cited in Sarros, Cooper et al (2006)]

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Literature Review findings

Workplaces need to be firmly grounded in:

- Spiritual intelligence (the ability to find meaning at work)
- An ethos of compassionate leadership
- Compassionate human resource management
- Compassionate workplace policies
- A companioning approach to support

Thompson (2007, in press) *Loss, Grief & Trauma in the Workplace*

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Literature Review findings

Spirituality, religion and culture are overlapping concepts, and, in any study of death and grief, they are difficult to differentiate (Abrums, 2000).

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Literature Review findings

- An ethos can encompass both spirit and culture, as ‘a way of living’ (as demonstrated through Bolman & Deal’s Leadership Frame of the ‘Symbolic’) [Borg, 1994].
- Culture provides the content of grieving [Riches and Dawson, 1997].

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Literature Review findings

- Borg (1997) describes spirit as:
a root metaphor for the sacred, and highlights that the Hebrew word for Spirit is *Ruach* which means breath and wind ... both are invisible yet manifestly real.

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Literature Review findings

An ethos of 'living the sacred' is a means for the Spirit to speak to us in the dailiness of our lives; ideally leading to discernment beyond the personal and immediate to a world perspective (Borg, 2003; Swann, 2001,2002).

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Literature Review findings

Need for new approaches and techniques [practices] that invoke the potential inherent in all loss for the growth of:

- **Self-awareness**
- **Interpersonal connection, and**
- **A deeper understanding of what it means to be alive**

The 2007 Handbook of Thanatology: The essential body of knowledge for the study of death, dying and bereavement [Balk, Wogrin et al. 2007]

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Literature Review findings

Kellehear (2005)

- * Universality of loss.
- * Need for “continuity of social relations” for grieving people.
- * Need to “reconnect death & loss to the broader experiences of change and endings”.
- * Need for “peer networks of support” – ‘buddy’ systems, mentoring programs, or structured responses by staff & students towards other staff and students who experience loss or serious illness.
- * Inclusion of “death & loss in everyday conversation to reduce high levels of fear, ignorance and dread”.

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Literature Review findings

Kellehear (2005)

- * “local policies must be ‘owned’ by a community”.
- * “renewal of civil society calls for the recognition of the centrality of ecology and environment”.
- * “desire to deepen the quality and extent to which a community may look after its own members”.
- * “community ownership of events and **activities**”.
- * need to “emphasise the whole person as individual-in-community”.
- * commitment to ... “community capacity-building ... performed top-down-within ... and ... bottom-up-within”.

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Literature Review findings

Kellehear (2005)

- * **Need for workplaces to have their own discussion about the potential role of compassion ... their own particular needs and strategies.**
- * **Explore using religious traditions as pedagogic basis of its learning and clients' supports to increase the community development and social approaches to professional care”.**

(Compassionate cities: public health and end-of-life care, pp. 50, 60-80, 87, 90, 93, 118, 156).

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Literature Review findings

- **Normal workplace tasks were affected when employees were suffering from a health related condition at work.**
(Econotech (2007) Sick at Work report commissioned by Medibank Private).
- **Grieving is not addressed in Econotech or Medibank Private's 2007 studies**
- **Two top factors affecting workplace tasks when grieving:**
 - **difficulty in thinking clearly when working (78%), and**
 - **difficulty in doing work without making mistakes (66%).**(James & Friedman, 2003).

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Literature Review findings

- **Workplaces are impacted upon when an executive is affected by a death of a loved one.**
- **Grief responses to 'everyday losses' have the potential to significantly affect the ability of the employee to function effectively.**

(James and Friedman, 2003)

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Any existing Work-related Grief Support programs?

Creative Ministries Network (CMN, an agency of the Uniting Church), is funded by a Victorian state government agency to provide grief support in response to work related deaths, suicides, industrial incidents and diseases.

CMN has developed a Work-related Grief Support (WGS) program.

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A Compassionate Befriending approach Methods

- Qualitative action research methodology
 - Document analysis (Board, staff and WGS program policies)
 - Key informant [in-depth] interviews

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Method

Document analysis

- ✓ Swann's (2002) Matrix of elements of compassionate leadership model - used to analyse CMN Board & staff policies & practices
- ✓ Kennedy et al. (2006) Befriending Evaluation Toolkit – used to analyse CMN Work-related Grief Support (WGS) program and practices
- ✓ Kellehear's (2005) nine policy vision and twenty-nine operational statements – used to frame analysis of in-depth interviews

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- Befriending approach for everyday grief support
- Workplace ethos – CMN faith community construct *and* a Compassionate Leadership approach
- Integrated – A workplace ethos of a Befriending, Compassionate approach (whole person/individual-in-community)

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This model involves three overlapping domains:

- **management (*compassionate leadership* as per Sarros, Cooper et al, 2006);**
- **‘workshop floor’ (*befriending* as adapted from Kennedy, McKenzie and Wilson et al, 2006); and**
- **the organisation as a whole (*workplace ethos* as per Swann, 2002; Bolman & Deal, 1991).**

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- NB: This Model has been adapted from Creative Ministries Network and its Work-related Grief Support (WGS) Program.

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Methodology

- Definitions used (ethos, compassionate leadership, befriending approach),
- Compassionate Befriending Model, and
- Interview Questionnaire

were informed by the literature review and document analysis.

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Action research methodology

- **Invitations to participate, and information packages including plain language statements, were sent to individuals via two sources:**
 - **Creative Ministries Network, and**
 - **a local government Inter-faith Network group.**
- **Informed consent received from 10 respondents.**

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	UCA	'Other'	Total
Sample size n=10	5	5	10
Male	1	1	2
Female	4	4	8
Total	10	10	

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Type (workplace sector)	UCA	'Other' by spiritual discipline	Total
Education	1	-	1
Healthcare	3	1 [RC]	4
Social Welfare	1	1 [ACA]	2
Chemical (ecologically friendly)	-	1 [Ba]	1
Allied Health	-	1 [Bu]	1
Funeral	-	1 [Ba]	1
Total	5	5	10

Legend: RC=Roman Catholic; ACA=Anglican Church of Australia; Ba=Baptist; Bu=Buddhist

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Size (workplace)	UCA	Other	Total
Micro [</=4]	1	2	3
Small [</=100]	1	3	4
Large [>100]	3	-	3
Total	5	5	10

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Summary

- 80% of interviewees were female
- 40% workplaces were involved in healthcare
- 70% workplaces were micro- or small-sized businesses

A Compassionate Befriending approach Language and Terminology

At the 2000 Millenium World Peace Summit of Religious and Spiritual Leaders, UN, New York, concern was expressed among religious leaders that there needed to be:

- **a universal language of the spirit, and**
- **a new language that is respectful of traditions, but capable of reaching people who are outside religious structures and who belong to the expanding secular society.**

(cited in Tacey, the Spirituality revolution: the emergence of contemporary spirituality, 2003).

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Language and Terminology

A challenge for this project was to find a language that:

- embraced Tacey's (2003) insight, and also retained the integrity of a faith perspective.

Swann's (2002) *compassionate leadership* model was chosen as one possible way of addressing this need in the research.

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Language and Terminology

Challenged by respondents e.g.

- **3 female respondents with formal chaplaincy qualifications resisted the idea of using specific language to articulate their ethos, and expressed difficulty in understanding the survey questionnaire.**

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Investigating **workplace ethos** was approached from two entirely different perspectives by identifying:

- the extent to which each workplace **'lived the sacred'**, and
- the elements of **compassionate leadership in the workplace.**

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Identifying the ethos

8 elements of the CMN faith community construct were identified (approved by UCA Synod), & were used to investigate...

'living the sacred':

- Meetings
- Publications
- Reports
- Retreats
- Sharing prayer
- Times for worship
- Times for ritual
- Times for personal reflection/prayer

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Table 1: Compassionate Leadership Model Matrix elements © Mary Tehan

Swann's Elements of Compassion (Swann 2002)	Bolman & Deal Leadership Frames (Bolman & Deal 1991)			
	Structural	<u>Human Resource</u>	Political	<u>Symbolic</u>
Celebrative	e.g. *Policies *Processes *Methods *Events	e.g. *Talents *Trust *Support *Listening *Self-esteem	e.g. *Harmony *Mutual support *Sharing	e.g. *Culture *Spirit *Values
Passionately Active				
Justice-making				
Benevolently Loving				
Creative				
Non-elitist				
Networking				
Transpersonal				
Pain Relieving				
Transcendent				
Fun-filled				

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Element	Yes		No		Not sure		N/A		Total
	UCA - Other		UCA - Other		UCA - Other		UCA - Other		
Meetings	3	4	1	1	1	-	-	-	10
Publication	3	4	2	1	-	-	-	-	10
Reports	3	3	2	1	-	1	-	-	10
Retreats	3	2	1	1	-	-	1	2	10
Sharing prayer	5	4	-	1	-	-	-	-	10
Times for worship	4	3	1	1	-	1	-	-	10
Times for ritual	5	3	-	1	-	1	-	-	10
reflection/ prayer	4	4	1	1	-	-	-	-	10

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Expressing the ethos in your organisation - results

3 UCA respondents -

- **Retreats as community gatherings**
- **Sharing prayer as sharing community stories**
- **Worship as sharing community celebrations/rituals.**

NB: note the language

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Expressing the ethos in your organisation

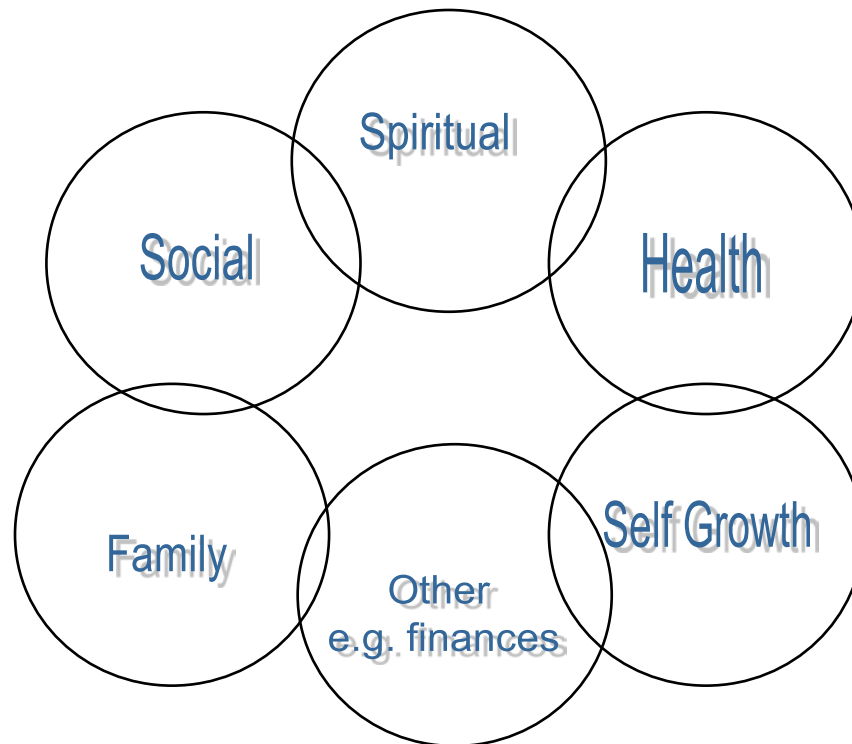
3 'Other' respondents -

- Worship as funerals (“my working environment”!)
- Religious congregation is not an organisation (partner of a micro-sized business)
- Retreats as time out together

NB: note the language

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Ethos expressed through compassionate leadership in performance reviews



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The Befriending approach

An intentional approach to grief support, administered by a trained person, the aim being to maintain another person's capacity to function as they experience their grief whilst at work (to attend to 'presenteeism')

(adapted from Kennedy, J., McKenzie, I., & Wilson, H. et al, 2006).

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The Befriending approach

- A befriender can be nominated for training by peers or they can be self-nominated.

The aim should not be for the person trained in the befriending approach to be the one who is the 'official befriender' to whom all grief and loss needs are directed.

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- The trained Befriender would be the person who trains all staff and fosters the befriending approach throughout the organisation and at all levels.

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The Befriending approach

Results

- 90% of respondents reported that workplaces would benefit from a staff member being trained in the Befriending approach to support a grieving person at work.
- 80% of respondents reported that, if staff were trained in the Befriending approach, it would offer companionship to a grieving person at work.

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The Befriending approach

Results

- 60% of respondents reported that they would change the Befriending approach to help work colleagues better **support a grieving person** at work.

Suggested change.....

- Centre on strengthening the Befriending approach and the **practice of compassion** in workplace culture through intentionally enacting and practicing it themselves.

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Everyday grief support

Everyday Losses

- **Violence at home**
- **A relationship break-up**
- **A partner or close friend undergoing major surgery**
- **The child of an employer or employee being bullied at school**
- **An elderly parent entering a nursing home**

Tehan (2007) based on findings from a community focus group to identify everyday losses.

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Everyday Grief Support (EGS)

- everyday grief support **strategies** were developed by the community focus group
- framework based on Bolman & Deal's Human Resource Leadership frame (1991) & Swann's eleven elements of compassion
- n=9 respondents completed the questionnaire section on EGS

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Swann's (2002) Elements of compassion	<h2 style="text-align: center;">Everyday Grief Support</h2> <p style="text-align: center;">© Mary Tehan Human Resource Leadership frame Bolman & Deal (1991)</p>	<p style="text-align: center;">Relevant YES</p>	<p style="text-align: center;">Relevant NO</p>
Celebrative	Create opportunities for grieving person & staff to grieve together	9	-
Passionately Active	Development of policies so that compassion is 'owned' by everyone	5	4
Justice-making	Policies that accept mistakes in the workplace as normal	9	-
Benevolently Loving	Grieving person chooses tasks etc that maintain 'agency' whilst meeting production needs	8	1 [possibly]
Creative	Grieving person offered roles for 3-6 months that may become permanent	7	2 [possibly]
Non-elitist	Leader listens with humility & validates courage through response and action	9	-

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Swann's (2002) Elements of compassion	<h2 style="text-align: center;">Everyday Grief Support</h2> <p style="text-align: center;">© Mary Tehan Human Resource Leadership frame Bolman & Deal (1991)</p>	<p style="text-align: center;">Relevant YES</p>	<p style="text-align: center;">Relevant NO</p>
Networking	<p style="text-align: center;">Encourages/acknowledges interdependence of staff; share gifts/talents between each other and grieving person (gp)</p>	9	-
Transpersonal	<p style="text-align: center;">Generates/strengthens a culture of appreciation and gratitude in leadership/staff attitudes to honour memory of gp's loss</p>	8	1 [possibly]
Pain-relieving	<p style="text-align: center;">Upholds identity, worth & belonging of a gp in their workplace</p>	9	-
Transcendent	<p style="text-align: center;">Encourage gp to explore areas that are life-giving & have spiritual meaning in & beyond their workplace</p>	8	1
Fun-filled	<p style="text-align: center;">Sorrow/suffering are acknowledged through respectful wit/playfulness</p>	8	1

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Everyday Grief Support examples

Examples of 'Yes' results

- Lighting a candle (6)
- Read a eulogy at staff meeting (5)
- Go to pub after work (6)
- Encourage heartfelt **apology** (7)
- Encourage expressions of **gratitude** (7)
- Offer to **share tasks** with gp when vulnerable (9)

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Everyday Grief Support examples

Examples of 'No' results

- Play **music** in the workplace that the gp enjoys
(4 no + 1 maybe +1 unsure)
- No example offered for **'fun-filled'** (1 no + 4 no response)
- Leader intentionally makes **silly mistake** to humanise situation (4)

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Overall results

- A compassionate leadership befriending type of workplace culture does not necessarily negatively impact on business profitability.
- It was within the Human Resource category that the merging of the Swann (2002) and Bolman & Deal (1991) perceptions seemed most directly relevant to this project.
- The research shows the importance of management style in relation to 'workplace culture'. It also highlights the importance of trust in the workplace.

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Overall results

Qualitative differences

- Whilst the UCA respondents generally supported the Befriending Approach, the 'Other' respondents were also aware that this approach was not an automatic process.
- The importance of trust, risk, intent, and of being authentic underpinned all of the responses, although the UCA respondents focused on formal responses compared with the values of 'Others' about inclusiveness and trust.
- The UCA responses were more task-oriented, while the 'Other' responses were more relationship-oriented.

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Insights about responses to Ethos

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Culture
emphasises...

Spirit
emphasises...

Assumptions

Discernment

Activities

Relationships

Expectations

Possibilities

Certainty/knowing

Uncertainty/unknowing/
mystery

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Overall results

Qualitative differences

- the 'living the sacred' elements gave a reliable reflection of the ethos of the majority of respondents' workplaces.
- everyday grief/loss experiences and some appropriate workplace responses were considered more immediately relevant in the 'Other' than the UCA workplaces.

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Overall results

- **Compassionate workplace policies alone would not be sufficient to ensure that workplaces practice the compassionate befriending approach to support a grieving employee.**
- **Embedding the practice of compassion in workplace culture requires compassionate leaders to intentionally enact and practice it themselves.**

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Overall results

- **Training leaders to intentionally initiate and maintain this befriending approach with their employees, or to designate and permit another employee to do so, would be essential to embedding a befriending approach into a workplace culture.**

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Summary

Managers who acknowledge the reality of grief in the workplace, and implement effective strategies to deal with it, are more likely to maintain business viability, improve workplace productivity, and retain valued employees, than managers who do not.

2008-2009

2008

Small Business Online Resources

**(launched at Small Business Victoria on 24th
April 2009) business.vic.gov.au/illness.**

2009

**Bone Marrow Donor Institute Back-to-work
project (unfunded, to be piloted in 2009)**

2008-2009

- **Victorian Equal Opportunity and Human Rights Commission (VEOHRC)**
 - to Table in Parliament the Compassionate Befriending Workplace as an example of Best Practice.
- **Foresight and Mental Wellbeing project (2008), Govn. Office for Science, London, UK**
 - Inclusion of compassion as a factor affecting wellbeing at work

http://dius.ecgroup.net/files/118-08-FO_b.pdf.

Where to from here?

Palliative care and terminal care are “two distinct specialities, rather like two fingers on the same hand. Although they lie next to one another and are joined at the base, they are also two separate entities. On this basis, **palliative care could concentrate on those patients who can be enabled to live with their disease for many months or years, whereas terminal care could focus on those patients who are in the final stages of life.**

[The Medicalization of Dying, Bronwen Biswas, p. 139, *in The future of Palliative Care: Issues of Policy and Practice*, edited by David Clark, 2000]

Where to from here?

- Suggestions?

“If a man cannot wait he cannot know the right time to move. If he cannot be still, his actions will have gathered no momentum”.
(Tribal Wisdom).



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