# Building a compassionate community:

## developing an informed and caring workplace in response to employee bereavement.

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**Abstract:** When an employee suffers a bereavement, the responses of colleagues and line managers can have long lasting effects. Critical elements in shaping this response may be Human Resource policies and their interpretation; these can influence not only the process of grief for the individual, but can also have a long term impact on the health of organisations themselves. This small interview study with recently bereaved employees indicates that the ways in which they perceive they are treated following the death of a loved one can deeply influence their ongoing relationship within the organisation. Handled well, these difficult episodes can instil a commitment from the employee towards work and aid in the grieving process. Inconsistent or poor support can, conversely, have long term negative consequences. It is imperative that bereaved employees are encouraged and supported by open dialogue with their colleagues and their line manager; the value of open and clear communication within the organisation cannot be overstated.

**Key words**
Death, bereavement, compassion, HR policy, qualitative research, employee

## Introduction

Death, dying and bereavement are issues that affect all of us at some time in our lives, albeit often unpredictably; for many people, these events impact upon their lives during their years in employment. Currently, there is a lack of clear policy in this area and support from employers is therefore variable. Human Resource (HR) departments have a major role in working alongside employees who are negotiating challenging problems in squaring the demands of work with responsibilities that relate to bereavement.

There are a number of ways that HR departments' policy documents communicate rights and entitlements

about leave associated with bereavement. Such arrangements can be incorporated under a variety of headings such as: bereavement support, special leave and compassionate leave. Further, an employee is entitled to take a reasonable amount of time away from their working hours to look after dependents, under a number of circumstances – predominantly focusing on emergency situations, in accordance with the *Employment Relations Act* (1999). However, this does not extend to paid leave at these times; paid leave is at the discretion of the employer.

For those people affected by end of life and bereavement issues, the existence of such a variety of HR policy documents relating to time away from the workplace can seem overwhelming, and entitlements sometimes conflicting. As an additional complication, there is also evidence that many HR policies relating to bereavement and family leave (including compassionate leave) are left to the implementation (and discretion) of line managers (McGuiness, 2009; Bond and Wise, 2003), who may base their decision regarding concessions about time away from work for employees on their own interpretation of HR polices (Yeandle *et al*, 2002). Bond and McCracken (2004) note how some managers base their decision regarding time away from work around their perception of the employee's commitment to their role, for example in terms of judgements about the employee's loyalty or willingness in the past to work for additional time. As a result, the authors stress the importance of appropriate management support and training, especially in enabling line managers to differentiate between legitimate business criteria, and what might be their own personal preference and bias (Bond and McCracken, 2004).

## Working during a challenging period around the death of a loved one is not always a negative experience.

Similarly, there is the suggestion that a need exists to increase awareness of employers' policies, and to train managers within this remit, too (Maxim and Mackavey, 2005; Yeandle *et al*, 2002).

Such requests for more transparency or more uniform application of principles run counter to the recommendation by others that HR policies and line management systems should operate flexibly (Charles-Edwards, 2005). Phillips *et al* (2002), for example, comment that managerial discretion and flexibility can be of particular help to employees and is essential. Further, they note that trust between the employee and employer is key.

McGuinness (2009) discusses a survey carried out in Ireland, in which 34 organisations were asked about their current policies, awareness of bereavement issues and support to those employees affected by bereavement. Organisations appeared to acknowledge that bereavement impacted on employees, affecting their work performance, raising issues of health and safety, increasing sick leave, and inducing different behaviours in those people affected. However, the majority of organisations surveyed (88%) had no specific bereavement policy or provision for compassionate leave (90%), although many (91%) had some form of provision for compassionate leave.

Although there is no legal right in the UK regarding the number of days leave that can be taken to cope with bereavement, time away from work is often mentioned within contractual agreements. McGuinness (2009) highlights that managers generally want guidance about appropriate support, and recommends an organisational bereavement policy that can set out standard procedures and entitlements for employees, provide a reference framework for managers, and that can also act as evidence that the organisation takes grief at work seriously. Similarly, the independent research organisation for trade unions, the Labour Research Department, proposes that policies should indicate clear provision, in terms of days allowed during times of bereavement, and that, ideally, these leave days should occur as paid provision for employees (Labour Research Department, 2011). Within their own enquiries, it was noted that time away from work was typically set at between 5 to 10 days leave, but that some organisations offered a 'guide' (not an entitlement) of 20 days leave for bereavement of a close relative (usually named as a spouse, parent or child).

## Compassion at work: is there an economic case for compassionate leave?

A period of economic slump may seem an inappropriate time to be looking at whether firms should be conceding further paid leave to employees and thus increasing their costs. However, there is recognition that employees already take additional time away from work, regardless of company policy, usually on the basis of procuring a 'sick note' from a GP during times of stress related to end of life and bereavement issues (McGuinness, 2009; Thompson, 2009). It might thus be the case that firms would do better to acknowledge the problem, plan for it and deal with it officially. There is a suggestion, therefore, that one way of doing this is for HR policies to support and encourage what an employee may be able to do at work, rather than what they are unable to do in difficult personal circumstances (O'Reilly, 2010). Indeed, the government strategy document *Recognised, Valued and Supported* notes that in providing a more flexible and caring approach the employer can benefit

from increased retention of staff, greater productivity and performance from employees, decreased sickness, and improved cost savings (HM Government, 2010).

The ways in which people manage and cope with their own grief are critically affected by how colleagues respond to their plight within the working environment (Charles-Edwards, 2009). Working during a challenging period around the death of a loved one is not always a negative experience. Indeed, some employees find that work can provide a welcome distraction from a dominant environment of grief at home (Charles-Edwards, 2009). The surveys undertaken by Maxim and Mackavey (2005) also indicate that employees often feel that their grief is validated by a manager who is sympathetic to their loss and perhaps encourages them 'not to worry about work'.

It is suggested that managers should recognise symptoms of grief in their employees (Hazen, 2009). In this way, they might be better able to provide support that enables the employee to resolve their grief. Hazen suggests that hidden or suppressed grief can result in missed opportunities, bad decisions and accidents (Hazen, 2009). The American Hospice Foundation (2000) notes that where loss and grief are acknowledged within the workplace, there are fewer mistakes, reduced sickness, lower staff turnover, and improved productivity.

It is possible that a compassionate approach will facilitate more intimate bonds with others, and work colleagues might also smooth the grieving process (Bento, 1994; Cosley *et al*, 2010). Further, the benefits for the person affected can be enhanced in the time that follows, too; Charles-Edwards (2009) suggests that a bereaved person can feel more motivated within their subsequent role when their working environment has been perceived as a source of help rather than of alienation. The constructive ways in which interactions with colleagues can help a grieving person return to work and consequently fit back into the social structure of the organisation more positively again are also discussed within the literature (Bento, 1994).

Further, a working environment that is perceived as supportive can aid return to work rates for people affected by grief and loss (Spelten *et al*, 2002). Flexibility in working can help employees to remain committed to their work, and to sustain higher morale, which in turn can increase productivity in the workplace, too (Fitzpatrick, 2007). Additionally, Hazen (2009, 293) states that employees should '*recognise that they are part of a system of reciprocity, feel less strain, and are available for work.*' This, she describes as a 'compassionate culture' in which people collectively notice, feel and respond to the needs of the other members.

## Scoping work in the field

The Compassionate Communities project at Teesside University was developed following publication of the

North East's 25 year public health strategy *Better Health, Fairer Health* (NHS Public Health North East 2008). The Strategy specifies ten themes, one of which is 'A Good Death', which advocates public health approaches to the end of life. Within the North East of England, the aim was to:

> '*Establish a charter for end of life care, with a statement of the rights and entitlements that should be honoured both for the individual preparing for death, and for their carers and families. This should relate not only to medical and nursing care, but to the behaviours of all agencies and sectors who deal with these issues.*' (*Better Health, Fairer Health*, 2008, 16)

As part of the resulting output, a Charter for *A Good Death: Time to think* in collaboration with patients and their carers was produced (Public Health Intelligence North East, 2009). The Charter aims to act as a guide to health, social care, community, voluntary and other organisations, groups or individuals who plan, develop and provide end of life care and bereavement support. It is framed around four sections which focus on respect, time to plan, care, and support, so that people affected by end of life issues are aware of what to expect from those around them.

A specific aim of public health approaches to end of life is to 'normalise' death and to address not just personal aspects of the topic, but also the structural and societal factors which impede our ability to respond compassionately to those nearing end of life and the bereaved. One aspect that has been identified as creating difficulties relates to the leave policies operated by companies and firms. To what extent do companies and firms admit the justice of these claims and how do they deal with them?

During the development of the Compassionate Communities project, the need for more clear and succinct guidelines, not only for employees, but also for their line managers, was evident. Within the North East region, time away from work (either with or without pay) following a bereavement varies; an initial scoping review of local HR policies indicated that time away from work can vary from as little as time off for a funeral to up to 12 working weeks, often depending on the relationship of the deceased to the employee.

## Analysis of HR policies

As a consequence of early scoping work in the locality a decision was made to apply for further funding to undertake an analysis of HR policies relating to employers in the Tees Valley. University Research Funding was awarded in spring 2011 and the following sections go on to describe the methods used and the results that emerged.

## Research aim and objectives

We conducted one-to-one interviews with employees affected by bereavement within the previous five years (as part of a larger research project). We aimed to determine whether HR policies support a Compassionate Community approach to bereavement. Specific objectives were to:

1. Investigate the flexibility with which these policies are interpreted by HR leads and managers.
2. Listen to the views of bereaved employees with experience of these issues.

## Method

The study aimed to gather data from 10 employees working in a variety of settings. Application was made to the School of Health and Social Care Research Ethics and Governance Committee. The application covered aspects of participant anonymity, confidentiality, disclosure and emotional support. Employees were recruited locally from the private and public sector and from both large and small organisations; they were interviewed in depth using a semi-structured approach. Recruitment was achieved through existing social groups, and via email flyers distributed on their behalf within local organisations by workplace health and communications officers from the local Primary Care Trusts and from third sector settings. Potential participants were provided with written and verbal details regarding the research and were asked to give their informed consent for their participation.

In undertaking a qualitative approach utilising semi structured interviews with a small number of employees, there was no intention to obtain a representative sample of potential participants. Rather, a great element of the research was dictated by the need to access participants who would be keen or at least willing, to allow a researcher to talk with them about a highly personal and emotive subject.

## Data collection methods

Semi-structured interviews aimed to explore the perceptions of employees who had recent experience (within the past five years) of needing to take compassionate leave due to bereavement. Open questions focused on personal experiences, and their thoughts around what worked well and not so well. Participants were encouraged to consider potentially beneficial changes, training needs and opportunities, difficulties experienced, and return to work arrangements. Alongside this, specific questions surrounding relevant policies were included.

Interviews were held on a one-to-one basis with the 8 female and 2 male employees. The interviews lasted between 40 and 65 minutes, averaging 48 minutes in total. Interviews were each held at a place suitable for the interviewee, ranging from their place of work (in a private room away from their colleagues) to their home. Transcriptions were completed, either by documenting a verbatim version of an audio recording of the interview, or in documenting a record based upon notes made during the interview (as some of the interviewees preferred not to have the interview recorded).

## Data analysis and results

A comprehensive approach to thematic analysis was used to analyse the data (Braun and Clarke, 2006). Initial codes were identified though reading and re-reading of the transcriptions, and then generated into potential themes. Themes were then reviewed, refined and named. Finally, five themes were identified:

- Perceived 'closeness' to the relative
- The line manager
- Use of 'policy' documents
- Understanding of the process of grief
- Financial impact

## Perceived 'closeness' to the relative

Employees were often asked about their relationship with the person who had died. This ranged from interest in the employee as part of a close personal relationship with their employer or line manager, through to employees feeling that their genuine request for time away from work was being 'graded' by the perceived closeness of a relationship that might exist with that person. For example, one employee reported:

> '*People didn't think my needs were important because they didn't think our relationship was close enough*' (F1).

This was with respect to the death of her sister-in-law, with whom she had a particularly close relationship. Another employee felt that his request for leave was granted, as the line manager had recently suffered the bereavement of a (same relationship) relative, his mother.

## The line manager

The relationship between the employee and the line manager was highlighted on a number of occasions, most notably in recognition that a good line manager could make all of the difference to what can be a traumatic experience. Implicit in this was the role of communication; typically, employees stated:

> '*The manager offered to help in any way that she could. She was like that all of the time.*' (F4)

This was in relation to the immediate bereavement, and also at other times later, too:

*'I don't really think we looked at the policies and worked it out – it just seemed right to have support when you needed it. There are enough pressures out there without work making it worse.'* (F2)

Clearly, the line manager's responses had longer term effects, too, with employees able to recollect phrases used regarding their bereavement experience many months, and occasionally, years previously. Notably, employees felt that support came from a personal touch, rather than one explicitly based within the organisation itself:

*'It needs good people managers – they make the difference.'* (F3)

However, others talked about a lack of support, or of initial support that quickly disappeared once the employee returned to work. Employees stated:

*'When I came back to work, no-one checked on me…I wasn't concentrating and was making mistakes, but no-one asked how I was managing.'* (F8)

*'Managers seem too busy with their own demands and agendas to be more understanding and accepting of the compassionate needs of their employees.'* (M2)

These employees recognised the demands of the organisation, but still felt that individual support should persist, too.

## Use of 'policy' documents

Some line managers seem to stick rigidly to their human resource policy documents, whereas others seem not to be fully aware of the entitlements of their employees. Employees talked about line managers checking their policy files at times such as bereavement, while other people noted that their line manager took a more flexible route. One employee, after learning of the death of her father, stated:

*'I couldn't believe her saying that they'd have to check how many days away from work that I could have.'* **(F8)**

Employees also noticed that there was variability in the number of days' leave granted in similar circumstance between employees. They also recognised that some people made use of policy guidance, but in ways unintended within the guidance:

*'If you have a 'number of paid days' then people just expect to have it – they 'take a lend' and spoil it for people with genuine needs.'* (F4)

Other employees understood that the demands of employers could not be ignored:

*'Working for a small company means that I can't get time off with pay, and I can't afford to have unpaid leave.'* (F6)

Generally, too, employees recognised the value of supporting employees at times of stress:

*'Some managers see that if they give a little, then they get a lot back.'* (F4)

This was usually described in terms of maintaining a loyalty to the 'company' or in ensuring that they worked to the best of their abilities once returning from compassionate leave.

## Understanding of the process of grief

Linked to the importance of the communication process with the line manager is that of understanding grief, and its fluctuating effects on the person affected. One employee stated simply:

'*There has to be more sensitivity and understanding.'* (F1)

Another employee acknowledged that she was increasingly unable to concentrate fully while at work in order to accomplish all of the demands made upon her:

*'I was desperately trying to fulfil work demands and home needs – it was just too much.'* (F5)

Others recognised that attendance in work can have benefits, too:

*'Work was a welcome distraction. If I'd have been at home, I would have had to think about it all of the time.'* (F4)

*'I went straight back to work – I just needed a sense of normality.'* (F6)

The time frame of the bereavement process was also highlighted:

*'When I felt low later – even months afterwards – he'd just tell me to go home and come back when I was ready to.'* (M1)

This employee appears to have had experience of a particularly supportive line manager, whose support continued for some months after his initial return to work following the death of his father.

## Financial impact

Employees often talked about the difficulties in not being paid when away from work. Usually, paid leave was limited

to just a few days, typically between 2 and 5 days leave. As a result, employees took their potential lack of income into account:

*'Sometimes you're just so tired and stressed but you can't afford not to be at work.'* (F2)

However, employees also noted that some of the colleagues had made use of paid leave to get 'additional' time away from work:

*'Work has a policy that allows paid compassionate leave … but some people just expect to have it as their 'right' – that makes it hard for the others, who are genuine in their needs.'* (F4)

Some of the people interviewed expressed financial worries, not just as a result of being away from work, but also on a personal basis, too:

*'I have to go sick to get paid now that I've had my paid compassionate leave, but I worry about whether I'll have enough to manage if I just get Statutory Sick Pay – because all of his money is tied up in probate. We never thought about a Will.'* (F7)

This supports some of the data already gleaned from work undertaken as a part of the broader Compassionate Community project, in that people need to be able to discuss death and to plan for their future as part of this discussion.

This particular interviewee (F7), for example, was uncertain of how much debt, including a mortgage, existed; her husband had attended to all of their monetary issues, and when he became ill, she did not feel able to broach the topic for fear of further compounding his 'worries'. Further, they had taken no life assurance or mortgage protection in the past.

## …employees [were] able to recollect phrases used regarding their bereavement experience many months and occasionally years previously.

## Discussion

These findings concur with previous findings gleaned during the extensive survey undertaken on behalf of the Strategic Health Authority within the region (Explain, 2010), especially with regard to people not making plans

with their families about death, dying and bereavement. The need to 'normalise' death and to make death, dying and bereavement part of life discussions is imperative; the taboo of death paradoxically continues to impact all too negatively on our lived experiences.

For example, there were heart-rending stories about bereaved relatives not being able to financially support themselves, or of being unprepared for a future without their loved one.

There was evidence of some really supportive working environments, and employees working within these organisations appeared to have a more positive regard for their colleagues, line manager and organisation generally. These organisations encouraged and supported open dialogue between the employee and line manager; the value of open and clear communication within the organisation cannot be overstated. This concurs with Charles-Edwards (2005) who highlights that the line manager should be at the front line of support for bereaved employees, and that lines of communication between the employee and line manager should be kept open.

Knowledge of the grieving process within organisations had resulted in better outcomes for some employees. Often, this support continued for many months following the death of a loved one.

Employees, too, often talked about the use of *ad hoc* leave which was viewed positively by participants, although some employees also felt that the 'system' remained unfair and open to abuse by some employees. Policy documents were clear and easy to access generally, and support from external sources, referred via the employer (such as a counselling support service), were valued.

However, there was also some evidence of environments where support to employees was limited. At times, support available to employees was dependent upon the line manager. Decisions around leave were at times made 'according to the sliding scale of love' (Bento, 1994 p35) which was perceived to lack support and understanding by some. Bureaucracy, too, was deemed as a negative means of dealing with employees at times of distress. There needs to be commitment from HR Departments to produce appropriate policies and guidance, alongside clarity for line managers and employees in utilising HR policies and guidance. There should also be adequate training and support for line managers, not least in terms of dealing with difficult situations.

Overall, there is evidence that some organisations appear to understand that there are obvious benefits (such as in increased productivity and commitment to the organisation) to providing appropriate support to employees. Unfortunately, however, some organisations appear not to understand this point, or to realise that there may be negative consequences associated with ignoring

bereavement (including increased sickness and absence, and low morale).

Excellent communication and knowledge of the grieving process are vitally important; open and honest discussions between the employee and line manager can only serve to improve the process of healing for the employee, and will aid in making the organisation better able to fulfil its wider work commitments.

The findings of this research reflect the experiences of a small sample of employees from organisations within the North East region (n=10). It is important to note that although their experiences provide important insights into this topic these experiences may differ from other employees working in different organisations. Further in-depth research is recommended in order to investigate this important topic more fully. The focus of research should also directly involve line managers. In the meantime, HR and Training Managers should ensure that their policies and management development are adequate to ensure that employees are well supported for the sake of staff morale and motivation as well as the business.

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