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Merging OBM with Discipline Systems: Making the Case for Performance Recovery

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ABSTRACT

Too often management attempts to control employee behavior by threats and punishment. Behavior analysis eschews aversive control and organizational behavior management (OBM) exemplifies this philosophical and ethical preference with a rich history of reinforcement strategies for appropriate work performance. Discipline in OBM emphasizes clarification of job requirements, monitoring behavior and results, frequent feedback, and maximizing short-, medium-, and long-term contingencies of reinforcement for effective performance, thus preventing additional problematic behaviors from employees. This results in efficient supervision that promotes employee development leading to successful worker performance and strategic goals for the organization. However, dangerous or inappropriate work behaviors necessitate punitive consequences. Well controlled evidence-based research concerning punishment in organizational settings is lacking and possible benefits are unknown.

KEYWORDS

Discipline; performance management; punishment; reinforcement

A pat on the back, through only a few vertebrae removed from a kick in the pants, is miles ahead in results. *Bennett Cerf*

No studies have been published in the *Journal of Organizational Behavior Management* (JOBM) explicitly carrying out research on punishment contingencies for over 30 years. This dearth of recently published OBM literature on punishment parallels the lack of punishment-based research in behavior analysis as a whole (Critchfield, 2014). The philosophical approach of OBM began with emphasizing reinforcement, contrasted to punishment, and this preference persists decades later (Gravina et al., 2018). Early founders of OBM, such as Aubrey Daniels, often took explicit stances against any use of coercion to influence employee behavior (Lattal & Porritt, 2008). This moral high road is both good and noble and should not be readily placed aside. If our field can be successful without punishment, then we should try to do so (especially if one considers the reputational costs of being viewed as pro-punishment and

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the preexisting overuse of aversive control already in place at many work settings).

Aversive control of human behavior is an ongoing controversy in behavior analysis, despite the promise of reducing unwanted behavior, due to the potential for also establishing harmful and problematic social practices (Leaf et al., 2022; Sidman, 1989; Zarcone et al., 2020). When aversive stimuli (e.g., threats or punishments) are used to decrease behavior, this mode of control may at least temporarily suppress responding and this immediate reduction of unwanted behavior may prove powerfully reinforcing to the individual who delivers aversive stimulation (Daniels & Bailey, 2014). However, this strategy can also prove limited since the emphasis is on what the individual did wrong rather than what to do right (unless reinforcement of correct behavior is included). Consequently, this approach has short-term gains and may produce additional collateral effects such as escape behaviors, emotional responses, and countercontrol (Skinner, 1953). Behavior analysts advocate for the use of reinforcement contingencies, compared to aversive control, for both ethical and efficacious reasons. In some ways, an anti-punishment foundation may have been built into the inception of the discipline by leaders such as B. F. Skinner and his vision for an aversive-free utopia held together by cooperative contingencies (Skinner, 1948, 1979). In both his research and personal life, Skinner passionately argued that punishment is the wrong answer to solve the problems that face us (Freedman, 2012; Vargas, 2004).

By extension, OBM operates under similar standards (Daniels & Bailey, 2014; O'Brien & Dickinson, 1982). If the punishment is not commensurate (e.g., too weak, too strong) to the employee behavior, then it is not effective in controlling maladaptive behaviors for the organization and may reduce cooperation (Bennett, 1998; Tenbrunsel & Messick, 1999). Managers responsible for employing sanctions tend to apply less severe sanctions (e.g., warnings) or completely overrule the organization's disciplinary action (Cole, 2008; Wheeler, 1976). Conversely, leaders who administer punishment appropriately do not necessarily gain improved levels of employee performance (Podsakoff et al., 2006). Further, the use of punishment can damage relationships between the manager and their subordinates (B. Bucklin, 2018). Overall, meta-analytic reviews of contingent rewards on performance are positively correlated with desired employee outcomes while contingent punishment show weak and nonsignificant relationships (Judge & Piccolo, 2004; Podsakoff et al., 2006). Daniels (2000) aptly delineated that punishment never solves a problem; it only tells employees what not to do and another undesirable behavior may replace it. Reinforcement for appropriate work behavior adds value to organizations because productive behavior replaces unproductive performance.

Systematic applications of contingencies of reinforcement for productive organizational performance require well-developed plans. Such plans involve

both rule-governed and contingency-shaped behavior. Training, instructions, incentives, contracts, policies, rules and regulations, and a myriad of other antecedents all specify and influence what workers should and should not do (Choi & Johnson, 2022). Typically, these are formalized and codified during contract negotiations, hiring, training, performance appraisals, and promotions.

However, these guidelines do not mean that OBM has never employed penalties for undesirable behavior on the job (Abernathy, 1996; Daniels, 2009; Daniels & Bailey, 2014). For example, in the very first article published in JOBM, Kempen and Hall (1977) reduced absenteeism by an attendance management system for the minority of 8000 industrial workers who abused their privileges. Reinforcing appropriate behavior (at work on time), coupled with progressive warnings and response cost techniques, decreased absenteeism and tardiness over 5 years in the 20% of employees exhibiting attendance problems. Nevertheless, this study emphasized positive incentives for employees who exhibited problematic behavior.

Similarly, Kopelman and Scheller (1981) decreased overtime and absenteeism via a mixed-consequence system of converting unrealized sick days for cash incentives coupled with supervisor approval for paid sick leave in a medical center. Ford (1981) decreased absenteeism when paraprofessional and direct-care staff were required to report sick leave absences directly to their supervisor. At that time supervisors provided information on the effects of absences for the organization. Sick leave decreased while vacation leave increased, a more easily managed form of absenteeism. Landau (1993) carried out progressive discipline on absenteeism and tardiness at a manufacturing plant over a four-year period. Three months after initiating cash rewards for good attendance, including bonuses for perfect attendance, supplemented the revised policy. Absenteeism decreased while a similar cohort did not change. Results from studies like these over many years led Arvey and Ivancevich (1980) to conclude that punishment is more effective when alternative appropriate behavior is concurrently rewarded, a position consistent with the philosophical approach by OBM researchers and practitioners.

As mentioned earlier, explicit studies on the use of punishment to manage employee performance have been very rare, especially in recent decades. However, it is likely that punishment remains a functional element of many interventions, even if not by intentional design. For example, the use of performance coaching or just feedback sessions in general often involve the use of corrective feedback to describe either substandard or erroneous performance (Guinness et al., 2023; Tilka & Johnson, 2018). Although this is rarely the explicit focus of such interventions, the use of corrective feedback after performance likely serves as a conditioned punisher (D. A. Johnson et al., 2023), sometimes for both the recipient and provider (Matey et al., 2021). In

fact, any accurate evaluations of performance that are consistently delivered in a timely fashion should occasionally involve the delivery of potentially aversive stimuli as a consequence, even when the focus is on bringing employees into contact with reinforcement contingencies. However, this incidential and periodic use of punishment does not represent a comprehensive or formal system for dealing with persistent problem behaviors.

Unfortunately, the paucity of punishment and penalty articles can leave OBM professionals ill-prepared on how to reduce chronic problem behavior that proves unresponsive to standard incentives or how to improve upon a company's existing discipline systems. For both practical and legal reasons, it is necessary for organizations to have mechanisms to handle discipline issues and such realities cannot be ignored on philosophical grounds. There are times when discipline is needed and blanket advice such as "catch them being good" will not suffice. Managers will continue to use and abuse punishment, even if OBM professionals do not engage with the topic (Luthans & Kreitner, 1973). To be clear, there are many instances when discipline and the approach described here would be inappropriate. There will be certain behaviors for which the only appropriate discipline action is immediate termination and therefore the steps described in this paper would not apply. Examples of this may include violations of "Cardinal Rules" for organizations, which as showing up to a manufacturing site while intoxicated, smoking around flammable materials, or embezzlement (Groover & Stricoff, 2018). Discipline would be inappropriate for outcomes for which the employee had little to no control over the events that produced the outcome. Instead, an investigation into the broader system failures would be called for (e.g., shortcomings in hiring and training, competing reward structures). A company should avoid being "discipline-forward" and discipline should be a last step as part of a balanced system. However, that last step will sometimes be reached, and it is imperative to utilize discipline soundly. As such, it may help to reduce the coercive elements of organizational practices if OBM professionals helped design discipline systems that minimize the use of punishment.

Discipline systems

To understand the potential for improving discipline systems, it is important to first understand what is wrong with typical discipline systems. Most follow a basic multi-step process (number of steps is not fixed) after an employee has violated some established policy or directive (e.g., Kempen & Hall, 1977; Landau, 1993). First, the employee is given an informal verbal warning by a superior. If problematic performance persists, a more formal warning is given for documentation to justify later steps. If a formal warning does not correct the problematic behavior, the employee is often suspended without pay or placed on probation. If this is not successful, termination typically follows

as the final step. Overall, this process can be summarized as a progressive discipline system (Redecker, 1989).

The problems with progressive discipline are the same criticisms made by behavior analysts against managing by reliance on aversive control. The emphasis is on what the employee has done wrong, often with little specific guidance on what the employee can do to improve. This superior-subordinate relationship is inherently adversarial, with management largely focused on building a case to terminate the employee in a defensible manner (from a legal or policy perspective). In general, once the employee is targeted by such a system, there is little consideration on how to rehabilitate the performer and the supervisor's ultimate solution is to find a replacement employee. This conflict has potential to be resolved better, but management may avoid guidance due to discomfort with corrective feedback (Matey et al., 2019) and wait until problems reach the "point of no return." An additional complication is that punitive behavior by management is often reinforced by a temporary improvement in employee performance or by removing a difficult employee from the work environment – whether temporarily or permanently (Daniels & Bailey, 2014).

Discipline without punishment

Grote (2006) wrote extensively about the problems with progressive discipline and provided an alternative entitled, "discipline without punishment" (abbreviated DWP hereafter). Although his approach is not devoid of punishing stimuli from a purely technical perspective, the moniker is derived from its emphasis on using reinforcement, shaping, goal setting, and collaboration to solve performance problems rather than simply using punishment alone. The following sections will highlight the broad strokes of a DWP system because it aligns well with an OBM approach to reduce aversive control (Abernathy, 2014; Brethower et al., 2022). Readers are encouraged to obtain the book to get a full understanding of how to handle the nuances of implementing and transitioning to a DWP system.

The DWP system follows a 3-stage model in the face of problematic performance. The first stage is Reminder I, in which the manager has a formal meeting with the employee that will be recorded on their performance record. The meeting can be in-person or remote – the critical feature is the meeting is formal and dedicated to only the employee's performance problem. Common recommendations (e.g., sandwich method) to add positive feedback (e.g., praise) with negative feedback has shown to decrease performance by inadvertently reinforcing problematic performance due to the sequence of delivery (Henley & DiGennaro Reed, 2015). No other topics should be discussed right before or after this initial session. Just as Daniels and Bailey (2014) warned that punishment, if used, should not start out gently

and gradually increase in intensity for fear that employees will habituate to punishers, DWP disposes of informal warnings. During the Reminder I session, the manager sits down with the employee and describes the current performance and contrasts this with expected standards. As such, this stage integrates feedback and task clarification (Choi & Johnson, 2022; D. A. Johnson, 2013) into the process of discipline and performance remediation. This stage also capitalizes on rule governance by reminding the employee of the responsibility to perform, just as the company has the responsibility to provide resources, training, and compensation. It is clarified that if performance improves within 6 months, the current infraction will be expunged from the performance record at the end of that period. As such, temporary substandard performance is not considered a permanent loss of status. However, if performance does not improve, the employee will move to the Reminder II stage of the DWP process.

If employee performance has not improved since the Reminder I session, the manager should make sure their action will be aligned with the positions of higher management and human resources prior to the Reminder II session. During the session, the manager once again formally sits with the employee and repeats the steps in Reminder I (current performance, expected performance, statement of values). However, the employee is given a memo summarizing the conversation and this memo goes into the employee's file. The memo will include names of individuals at the meeting, date, specific problem, record of all previous conversations (casual, informal, and formal), and situations which must be corrected. Furthermore, the memo will only be removed if the employee does not repeat the substandard performance concern for one year.

The third stage of the DWP approach is the Decision-Making Leave stage and probably represents the most significant departure from traditional approaches. If the interventions from the previous two stages fail to improve performance to an acceptable degree within the timelines indicated above, the employee is then given a day off from work. However, unlike a typical leave without pay, the employee is fully compensated with the normal earnings for one day. Prior to the meeting, the manager should receive approvals from senior managers and head of human resources and create a memo as in Reminder II. Next, the manager will determine a day that will cost as little disruption as possible to the organization and ascertain how the work will get done while the employee is on leave. During the Decision-Making Leave meeting, the manager will follow the same pattern as Reminder I & II and explain the procedural elements of the Decision-Making Leave. The manager is to provide clear instructions on when the employee is due back, what to do while on leave, and what to do when they return (e.g., go to manager's office to inform of decision). When the employee returns to work they will sign a memo, as in Reminder II, which includes the contents of the discussion,

employee decision to stay with the company and intended change moving forward. It is essential the employee is informed they will be terminated if further problems arise to maintain integrity of the discipline system. The memo will only be removed if the employee does not repeat the substandard performance concern for two years (with termination as the only alternative left for further substandard performance during those two years).

Although paying an employee during a leave for problematic performance may seem unorthodox, there are several good reasons for this approach. First, it reduces the probability of an intense and angry response from a forced leave by removing worries of financial hardship. It also relieves managers having an emotional confrontation and guilt for potentially endangering one's ability to pay for life's necessities. Instead, the Decision-Making Leave is framed as a day to focus on problem solving. The employee should dedicate this day to figure out how to get their behavior to align with company standards or consider departing the organization if unable to improve performance. Grote (2006) explains that leaves without pay tend to worsen situations and exacerbate the trajectory toward ultimately firing an employee (as opposed to saving a potentially valuable member of the existing team). Unlike the previous steps, the Decision-Making Leave represents a dramatic change in stimulus conditions to prompt new behavior. Of course, it remains essential that good performance is routinely recognized and rewarded to prevent resentment by good performers that the employee getting a "free day off" for misbehavior. As such, the DWP approach should not be implemented without the support of other performance management initiatives exemplified by organizational behavior management research.

Tips for implementing a DWP system

Preparation for the meeting

Grote (2006) delineates several guidelines for preparing, conducting, and following up with a meeting related to DWP. Regarding preparation, it is important to collect information and develop a description to achieve the short-term goal of getting an employee to agree to change and the long-term goal of solving the problem. Preparing for a disciplinary meeting should be similar to preparing for any performance improvement meeting (especially including documentation). For example, like any performance improvement initiative, the DWP process requires the supervisor to define the concerning issue precisely (including pinpointed behavior or products), describe in detail the current behavior or results, and set goals for minimum performance (Choi & Johnson, 2022; Wilder & Cymbal, 2022). Problematic performance should only be described in measurable concrete terms; accusations, assumptions, and inferences about intentions or motives should be avoided (comparable to

a lawyer preparing for a court case who should only present the facts). For clarity, only the performance of primary concern should be planned for discussion (other problems can be discussed in separate meetings). The supervisor should document detailed descriptions of observations and record behaviors which do not meet standards under natural occurring conditions. This may involve observing a high performer to compare and identify low performer behavior(s) (Gravina et al., 2021). These descriptions should connect the performance expectations to important business reasons (otherwise consider revising policies if there are no business-related reasons). This is important so the supervisor can calmly and nonconfrontationally describe both the need for change and the consequences if performance does not improve ("this is a problem and here is why . . . "). A supervisor should not enter this meeting expecting to just assert their authority (e.g., "do it because I said so").

Conducting the meeting

The meeting should be carried out in a private and neutral location and the supervisor should get to the point without small talk by stating, "I have a problem and I need your help." Using the prepared materials, the supervisor should then state the problem and ask the employee about it. It is critical to carefully listen to what the employee states. The supervisor should not accept the problem cannot be solved or entertain redirects to other topics. However, if the problem does not actually exist upon hearing more details (e.g., an error in records) or if the problem is fully under the organization's control and not under the employee's control, the supervisor should reevaluate whether this disciplinary discussion is appropriate. If the problem is under the employee's control, the supervisor should not attempt to solve it for them. The supervisor should attempt to get full agreement from the employee to solve the issue and partial agreements (e.g., "I'll try") should not be accepted. The supervisor should simply and clearly outline the actual performance, desired performance, business reasons for the desired performance, and the consequences if the employee does not meet the desired performance. After the employee agrees to solve the problem, the meeting should be quickly concluded by noting the discussion was part of a formal disciplinary action and it will be last time this will be addressed.

Clearly, the DWP process involves performance feedback to the employee during all three stages. The meetings are designed to focus solely on the behavior or results under control by the employee that is problematic; no other topics or issues are discussed. This aligns well with best practices in organizational performance feedback (D. A. Johnson, 2013; D. A. Johnson et al., 2023; Sleiman et al., 2020). For readers interested in learning more details on the DWP systems, such as logistical issues, implementation and integration guidelines, and strategies for dealing with

various objections, we refer them to the full book by Grote (2006). One cavaet that should be noted is that although Grote's recommendations are based on years of successful consulting experience, they lack carefully controlled research to validate them (largely due to the absence of research on the topic in general, as noted earlier). The core steps provided above were detailed in the interest of developing a framework with the potential to be experimentally investigated and to provide current guidance to practitioners.

Discipline as a core component of performance management

Although in OBM we emphasize a preference for reinforcement over aversive control contingencies, as noted above DWP does not eschew punishment completely. Performance management antecedents specify the contingencies leading to short-, medium-, and long-term consequences for employees who meet goals and objectives for their own work as well as the strategic outcomes for the organization (B. R. Bucklin et al., 2022; Daniels & Bailey, 2014). If these incentives are designed well and implemented successfully, penalties or punishment are rarely, if ever, necessary (Daniels, 2000). For example, individualized bonuses, gain sharing, profit sharing, stock options, and other rule-governed policies or contracts can improve performance of both employees and their host organizations. These win-win strategies sustain day-by-day effort and leverage long-term performance. Well-designed incentives are mutually beneficial for workers and organizations, enabling both to become successful (Abernathy, 1996; C. M. Johnson & Beehr, 2013).

Punitive contingencies are still required in organizational settings for high-risk work behaviors such as sexual assault, smoking in flammable areas, or firearm offenses. Unfortunately, some organizations utilize aversive control as their primary motivator because owners and managers see short-term gain with coercive threats and punishment (Sidman, 1989). Compounding this concern, J. Komaki (1983) noted it is not uncommon for managers to view delivering praise as being "soft" in competitive work environments. She added that managers believe that recipients question ulterior motives in those who attempt to deliver compliments or recognize worthy performance. Daniels (2000) described this problem well:

> Why, then, is it that the use of negative consequences is by far the more common way of getting things done in business, industry, and government? It is very simple. Mother Nature pulls a trick on us. Negative reinforcement is more likely to provide a PIC (positive immediate certain) for the user than positive reinforcement. If you positively reinforce a behavior, you will have to wait until the next time there is an opportunity for that behavior to occur to see if your positive reinforcement effort worked (PFU) (positive future uncertain). If you use negative reinforcement, you are likely to see increased activity immediately. (PIC) (positive immediate certain)

> The trick of nature hides the fact that when a substantial performance is needed, the best and fastest way to get it is with positive reinforcement. Remember that positive reinforcement accelerates behavior. It is the only consequence that does. (Daniels, 2000, p. 52)

Couple this immediate behavior change through threats with regression to the mean to an individual's average performance following exceptionally high and low levels-of-responding, it is not surprising that aversive control is so pervasive. That is, verbal punishment administered by trainers and managers is reinforced by behavior change exhibited by the recipients while praise undergoes extinction (D. A. Johnson & Johnson, 2022; Tversky & Kahneman, 1974). Despite long-term problems from these short-sighted training and managerial tactics, some organizations that emphasize aversive control continue to exist (but not thrive) because their marketplace is not free economically, politically, or both. Such constraints allow these organizations to survive, but at less-than-optimal levels.

For example, some organizations hire more employees than they need and only keep those who perform well, laying off or firing the rest. This is comparable to swimming coaches throwing groups of recruits in the pool and only keeping those who make it to the other side. They just drop those that only tread water and for those that drown, they are replaced with new applicants. Call it "competitive personnel selection" in which there is little to no need for "training." When marketplaces change, however, these organizations are the first to lose good employees (they abandon ship) or there are general strikes as a form of countercontrol. In totalitarian environments (noncompetitive markets) this may work short-term, but that is why citizens escape and immigrate to better places or why revolutions begin. Skinner (1978) depicted this issue well when he described human behavior and democracy. "The very substitution of positive reinforcement for aversive control is, of course, at the heart of the struggle for freedom" (Skinner, 1978, p. 11).

Remarkably, the United States government investigated how various agencies discipline federal employees who are sanctioned for misconduct. Alternative discipline options included donating annual leave time to a leave bank, completing community service, or carrying out research on the specific misconduct to learn the harm it caused and then share this with others in the work unit (United States Merit Systems Protection Board, 2008). Like DWP, these alternative discipline possibilities are designed to reduce inappropriate work behavior without harsh aversive controlling techniques. It would be useful to see how well these alternative discipline strategies work in a transparent revelation by the federal government. It would be even more remarkable to see if well-controlled experiments have been carried out through either program evaluation or

by comparison research (Erath et al., 2021; J. L. Komaki & Minnich, 2001).

Not surprising, there is little well-controlled research studying punishment and aversive control in management and organizational settings.

> The application of punishment within organizational settings is generally a neglected area of inquiry in the field of management . . . . Although punishment is a complex process influenced by a number of variables, continuing to ignore punishment as a practical managerial strategy will not enhance our understanding of the procedure. Only rigorous research and an open dialogue will provide the insight needed to understand the effectiveness of punishment in organizational settings. The question is not so much whether punishment is good or bad. It exists and is found quite frequently in organizational settings. The question should be: How may punishment best be used to accomplish behavior change?. (Arvey & Ivancevich, 1980, p. 131)

As noted in the beginning of this paper, OBM and the field of management in general have not studied punishment from evidence-based research for many decades. We are not advocating exclusive aversive control in organizational settings, however OBM needs to provide empirical research to continue to justify our emphasis for reinforcement rather than punishment contingencies. It is essential considering the lack of translational research to warrant this philosophical and ethical preference (Critchfield, 2014). Basic research in the experimental analysis of behavior, where a single organism responds in a controlled environment, may not translate to studying individuals as well as groups of employees working in various organizational settings. Punishment may increase positive social cohesion for groups experiencing aversive stimuli, a potential benefit (Critchfield, 2014). However, the author acknowledges these potential benefits of punishment for people as social species are both speculative and controversial. Punishment principles for humans are currently unknown due to possible translational overconfidence from lab research and from a lack of empirical evidence of performance in organizational settings. Granted, such investigations will not be easy to conduct for a myriad of reasons, such as institutional review boards being hesitant to approve studies with an explicit focus on the application of punishment, organizations being reluctant to modify existing discipline systems, researchers not wishing to be associated with aversive procedures, consultants wanting to place greater priority on building positive work cultures before tackling punitive measures, and more.

Explicitly delineating control and countercontrol reinforcement contingencies that minimize, eliminate, or prevent punishment is noble, but as advocates for scientific research we need empirical studies to document and thus validate our position. In addition, this leads to a rhetorical question, who will control the controllers (Q*uis custodiet ipsos custodes?)* (Skinner, 1978, p. 14)? Perhaps more precisely, *what*? Systematic reinforcement strategies, rather than trial-and-error and coercion, is vital. Obviously, this includes all employees,

managers, and owners in any organization (Daniels, 2000; O'Brien & Dickinson, 1982). Expanding this to whole countries is self-evident. Humans, organizations, and the cultures will not undergo extinction if we apply reinforcement strategies rather than emphasize coercion and punishment. "Since a science of behavior is concerned with demonstrating the consequences of cultural practices, we have some reason for believing that such a science will be an essential mark of the culture or cultures which survive" (Skinner, 1953, p. 446). It is imperative that behavior scientists and consultants inform discipline systems in the workplace that mitigate traditional approaches of an emphasis on threats, punishment, and coercion to create reinforcement-focused systems that effectively shape employee performance.

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