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A Model and Resource for Organizational Leadership for Occupational Therapists

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A MODEL AND RESOURCE FOR ORGANIZATIONAL LEADERSHIP
FOR OCCUPATIONAL THERAPISTS

by

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A Scholarly Project

Submitted to the Occupational Therapy Department

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for the degree of

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This Scholarly Project Paper, submitted by April M Kingsbury in partial fulfillment of the requirement for the Degree of Master's of Occupational Therapy from the University of North Dakota, has been read by the Faculty Advisor under whom the work has been done and is hereby approved

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May 12, 2006

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CHAPTER I

INTRODUCTION

The healthcare work environment has made increasing demands on occupational therapists in regards to caseload and productivity, but has offered little support for therapists interested in leadership development. Historically, lack of involvement and professional activity by occupational therapists has been of concern. The profession of occupational therapy is largely made up of women. Crawford (1999) asserts that it is difficult for many occupational therapists to get involved and contribute to leadership positions due the demands of the job and family life, as well as feelings of inadequate leadership skills. The “glass ceiling” effect in healthcare contributes and inhibits women from advancing in achieving professional and personal goals (Wofford et al.,1998; Madsen & Blide, 1992). An increase in leadership involvement by occupational therapist is required for the vitality of the profession to be successful during times of change.

A literature review was conducted on topics of professional development and leadership in occupational therapy, leadership characteristics and styles, application of and methods for organizational assessment, and implementing organizational change or sustaining stability. Numerous definitions and attributes pertaining to professionalism and leadership development are addressed in the

literature, although no one specific definition has been used to set the standards of expectations for occupational therapists. Early leadership theories identified specific traits, characteristics, and behaviors the leader should demonstrate, while contemporary research has concentrated on the leader's ability to evaluate their skills and performance to effectively influence others within an organizational culture (Marquis & Huston, 2003).

Vance and Larson (2002) indicated that the majority of the longitudinal studies on leadership and organizational development are within the business, political, and corporate world. They further maintain that the definition of leadership is dependent on the specific theoretical, methodological, and substantive aspects and values that incorporate into the context in which leadership is being utilized. The transactional and transformational styles developed by Bass (1985) offer comparative perspectives as to how various occupational roles might be accomplished and appropriate leadership styles determined to fit different contextual situations.

The transformational leadership style has been positively associated with organizational change (Bass & Avolio, 1993). This style of leadership requires long term strategic planning, clear organizational mission and values, and inspiring others complete organizational goals and objectives for positive leadership effectiveness. Transformational leaders successfully change organizations by modifying strategies and activities based on the contextual environment, values/mission of the organization, and follower response. In

regard to leadership traits, transformational leaders tend to be self confident, assertive, risk taker, personable and respects others, and able to think on their feet (Ponder, 1998).

Transactional leadership style has been identified as appropriate for maintaining organizational stability. A transactional leader accepts organizational goals and usually operates within the boundaries of the existing working system. This style of leadership focuses on procedures and meeting objectives/goals efficiently. In transactional leadership followers comply with the expectations of the leader in exchange for praise, rewards, and resources or the avoidance of disciplinary action (Bass & Avolio, 1993). Traits associated with transactional leadership include action and goal oriented behaviors, assertiveness, defectiveness, effective organizational skills, and dominating personality type (Maher, 1997; Tomey, 2000).

The above information is consistent with the process of change and adaptation that is suggested by the Occupation Adaptation (OA) Model, written by Schkade and Schultz (1992). This model provides a structure to assist the leader in assessing occupational challenges and role expectations and to adapting leadership styles as needed. The process of reflecting on personal characteristics and organizational contexts is integral to the OA Model, and provides a framework for assessment of organizational effectiveness.

There is a need for a resource that promotes personal and professional growth and prepares occupational therapists to become more effective leaders.

The purpose of this project is to provide occupational therapists with a tool to support involvement and increase feelings of self-confidence in leadership positions within professional organizations.

The following chapters profile the aspects of leadership development that are pertinent to occupational therapy leaders in professional organizations.

Chapter two provides a comprehensive review of the literature on professional leadership development skills, leadership styles and theories, and application of models for organizational assessment, with a concentration on occupational therapy and allied health care. Chapter three describes the process followed for the literature review and designing the reflective leadership workbook for occupational therapists. The product, *Leadership Development Workbook for Occupational Therapists* may be found in chapter four. Finally, chapter five summarizes the project and includes recommendations for the future development and/or modifications and research needed to determine the effectiveness of leadership development for occupational therapists.

CHAPTER II

LITERATURE REVIEW

Breines (1988) considers occupational therapy a dynamic profession, serving a wide variety of populations and environments and changing continuously to fit the working environment, and more importantly, clients' needs. Kasar and Muscari (1999) assert that during times of change it is essential for occupational therapists to be actively involved advocating the skills, knowledge, and values of occupational therapy in order to be successful within the medical field and society. Historically, lack of involvement and professional activity by occupational therapists has been of concern. In 1937, the president of the American Occupational Therapy Association (AOTA), Eleanor Clark Slagle, expressed her concern regarding the lack of professionals joining the organization and encouraged active involvement and participation from more occupational therapists (Stoffel, 2003). Breines (1988) has also maintained that many leadership positions within occupational therapy remain vacant for periods of time, or are filled with individuals who intend on temporary assistance rather than commitment to the ideals of the organization. She notes that a lack of time and resources to meet the demands of the leadership positions may be an issue, as well as feelings of inadequacy for perceived leadership roles.

In 1999, over seventy representatives from the Canadian Association of Occupational Therapy united together to identify essential professional development skills necessary for the future of occupational therapy in Canada (Baptiste, 2000). The three key components of professional development identified include knowledge, skills, and behaviors. This conference concluded that knowledge ought to be portrayed through representation of high standards of competency as well as a commitment to mentoring as a foundation to continuing growth in professional development. Clinical and practical skills were identified as imperative to the profession. Specific skill development was also highlighted as important for increased professional self-awareness and confidence in leadership abilities to effectively advocate the occupational therapy profession. Behaviors considered relevant to professionalism for the future of occupational therapy included effective collaboration and communication amongst other professionals, as well as commitment to research, education, and mentorship (Baptiste, 2000).

In reflecting on these issues, Baptiste (2000) acknowledged the priority and importance of knowledge but was primarily adamant about the need for occupational therapists to experience professionalism through the availability of role models and mentors, and reflective processes that contribute to continuing professional growth. She supported the need for collaborative leadership to develop strong national vision, and multi-sectoral leadership to build the infrastructure for occupational therapy.

Numerous definitions and attributes pertaining to professionalism and professional development are addressed in occupational therapy literature, although no one specific definition has been used for standards of expectation (Bossers, Kernaghan, Hodgins, Merla, O'Conner, & Van Kessel, 1999). Bossers et al. (1999) determined professional development significant to the success of the occupational therapy profession and developed curriculum for occupational therapy students that encompasses professionalism as a core component of competency standards. These authors found that a consistent description or definition of professionalism was lacking in the literature. Through a literature review and qualitative analysis discussion group, Bossers et al. (1999) developed a schematic diagram presenting professional skills, behaviors and responsibilities for occupational therapists to use as a framework for developing professionalism at the student level.

Professionalism, according to Bossers et al., (1999) includes highly specific professional codes related to professional parameters, professional behavior, and professional responsibility. Each category has listed complementary characteristics and qualities occupational therapy students and educators can use to evaluate skills and behaviors required for competency.

Professional parameters include understanding of legal, ethical, and moral issues pertaining to occupational therapy practice. Occupational therapists need to abide by confidential laws and display proficient behaviors and integrity both at work and in public. Personal behaviors encompass the essential knowledge in the

areas of skills and practice procedures that provide the most efficient evidence based and client centered approach during treatment. Professional behaviors also address client and team relationships, as well as professional presentation. The theme of professional responsibility is highlighted in areas where a therapist must take a leadership role, and the authors maintain that members of the occupational therapy profession have a sense of responsibility to the profession, to one's self, to one's employer and client, and to the community (Bossers et al., 1999).

Dineo (2002) proposed that establishing a sense of leadership responsibility for the profession at the student level will perhaps increase professional involvement and activity in novice graduates. In doing so, the expected outcome is that they continue providing charitable deeds throughout their career. She asserts that the vitality of the occupational therapy profession depends upon professional leadership and an increase in professional activity. She declares that before students can be influenced to increase professional activity, each current practitioner, administrator, educator, researcher, and leader within the occupational therapy profession needs to individually evaluate levels of professional commitment and involvement. If this is done, students will have adequate role models to follow in the area of professional leadership.

According to Dimeo (2002) professional activity must include membership, as well as involvement and leadership in professional organizations at the local, state, and national levels. These levels of activity promote the integrity and merit of the occupational therapy profession. Involvement in

professional organizations also benefits the individual through increasing opportunities for information exchange, collaboration amongst other professionals, and continued educational learning (Kornblau, 2001).

Ledet, Esparza, and Peloquin (2005) also determined the need for developing a comprehensive and reliable source for evaluating and establishing professional behaviors within occupational therapy students. They identified knowledge, attitude, and interpersonal values essential characteristics necessary for professionalism within occupational therapy. The authors developed a *Student Self-Assessment of Professional Behaviors* form for students to self-evaluate and reflect on their professionalism throughout their educational process. Areas assessed include: commitment to learning and excellence, personal responsibility, social responsibility, supervisory relationships, communication competency, time and stress management, safety, and adhering to policies and procedures. Ledet et al. (2005) asserts that this process is useful for providing structure to educational facilities and implementing professional development in occupational therapy students through the use of self, peer, and faculty evaluations.

Kasar and Mucsari (1999) offer a model for professional development that extends beyond the entry level education of the therapist. They believe that professional behaviors start at the educational level and continue to develop sequentially in stages throughout the therapist's career. Their model is compared to Erickson's eight life cycle stages; without successfully completing one stage, the occupational therapist cannot progress to the following stage. They maintain

that occupational therapists progress through these stages by mastering a series of professional conflicts which evolve over time, require changes in behaviors and thinking, and might lead to feelings of imbalance.

The hierarchical model of eight stages that Kasar and Mucsari (1999) identified include: beginning student stage, senior student stage, new graduate occupational therapist, graduate occupational therapist novice stage, role identification stage, collaboration stage, proficient stage, and reflective stage. They suggest that occupational therapist's develop competency skills and professional behaviors including communication skills, verbal communication, supervisory process, clinical reasoning, organization skills, cooperation, empathy, initiative, presentation, professionalism, and dependability, as they progress through the eight stages. They maintain that these behaviors are not inherent, but skills in students and clinicians as a result from practice, experience, role mentorship, and evaluative feedback.

In this model, the beginning student stage is a critical point in which the student evaluates themselves and the educational environment they are in, to determine whether or not they truly want to be an occupational therapist. Foundational to this stage is the trusting relationship that develops between the educator and the student. Students that continually face unmet or deferred needs will establish a sense of doubt about their education and lead to questioning their decisions to pursue the occupational therapy profession. This trust is essential in subsequent professional relationships as well.

Once trust is established the student will progress into the senior student stage. This stage correlates with students' increase in independence and the development of professional self-concept and self-esteem. Frustration and impatience may arise when students are held back or kept dependent in areas that they are well capable of exceeding in. Autonomy is necessary for a student to differentiate from their educators and requires clinical reasoning skills for successful completion of this stage (Kasar & Mucsari, 1999).

In the novice stage, clinical challenges are met with energy and enthusiasm and idealistic vision drives the therapists' behavior. Repetition in assessments and treatments occur to ensure a sense of mastery due to lack of clinical experience and reasoning. Guilt, concern, and/or panic may occur if judgment and beliefs differ from other clinicians or supervisors which may interfere with moving onto the graduate occupational therapist novice stage (Kasar & Mucsari, 1999).

The graduate occupational therapist novice stage is predicted to evolve from a sense of achievement and desire to master occupational therapy responsibilities. Professional relationships with colleagues and team members are significant in providing sufficient support and collaboration to ensure effective communication. Inferior thoughts are usually indicated by unrealistic expectations of self or disappointing the supervisor or interdisciplinary team. These feelings of incompetence in one's work can lead to decreased enthusiasm

and motivation and will inhibit progression into the role identification stage (Kasar & Mucsari, 1999).

Once the therapist moves past the graduate occupational therapy novice stage, they initiate the discovery of specific skills and behaviors that complement both their professional and personal interest. The role identification stage is a process that integrates reflection of ones knowledge and interests into their personal and professional roles. Determining identity within a professional field of interest further supports higher self-esteem and self confidence, role confusion may result if a therapist is incapable of developing a sense of who they are and what they strive to become. This might be accompanied by a sense of career apathy, deteriorating professional behaviors, or departure from the career (Kasar & Muscari, 1999).

Once occupational therapists advance from the role identification stage, they begin to develop stronger, more satisfying relationships with the interdisciplinary team and/or other health care colleagues and progress into the collaborative stage. It is important for effective communication and collaboration amongst other professionals in order to provide an environment that allows sharing of knowledge, skills, and professional opinions to enhance self confidence and build supportive networks. If an individual avoids or is unable to participate in this collaborative process due to the barriers in the contextual environment, lack of ability to meet professional goals and possibly isolation may result (Kasar & Mucsari, 1999).

Occupational therapists that have reached their professional goals and want to continue challenging themselves can devote their skills and time teaching the new generation of professionals. Mentoring, teaching, orienting, presenting, conducting research, and writing articles are examples of ways in which they might contribute to the occupational therapy profession and enhance self learning in the proficient stage. If occupational therapists accomplish professional enhancement in the proficient stage they move on to the reflective stage. The reflective stage involves personal change through self reflection and review about one's choices and accomplishments. If accomplishment are lacking, boredom and emptiness may follow, resulting in self-absorption. These individuals might react against contribution, and instead, become a negative role model, easily threatened by others. Conversely, a feeling of integrity occurs if the therapist feels their decisions and choices throughout their professional career were the best decisions possible. Failure to master integrity results in conflict and regret over the trajectory of one's professional life (Kasar & Mucsari, 1999).

Personal leadership skills are essential to competency in leadership roles. Likewise, leadership style might determine and effect the course of action taken by a particular leader. Context and consideration of varying methods of organizational change further contribute to a comprehensive leadership approach (Marquis& Huston 2003). In fact, Vance and Larson (2002) assert that the definition of leadership is dependent on the specific theoretical, methodological,

and substantive aspects and values that incorporate into the context in which leadership is being utilized.

Early models of leadership development were dominated by discussion of trait theory, which describes specific characteristics or traits possessed by successful leaders. These traits were first considered to be inherited, although further theories went on to suggest that the characteristic can be learned through experience and education. According to Ponder (1998) traits of a successful leader were identified as adaptable, amiable, caring, confident, convincing, courageous, curious, decisive, discerning, empathetic, ethical, fair, honest, innovation, organized, persistent, responsible, and self-directing. These traits were then assumed to set the stage for leaders to practice either autocratic, democratic, or laissez-faire leadership styles within their organizations or businesses (Tomey, 2000).

Tomey (2000) describes authoritarian or autocratic leadership characteristics as valuable in situations where decisions need to be made quickly and decisively. Behaviors and characteristics of the authoritarian leader, according to Marquis and Huston (2003) include: making the decisions for the situation and the group, motivating by coercion, and directing others instruction assertively.

Democratic leadership contrasts with autocratic in that it is more suited for groups who work together for extended periods, and has the outcome of promoting autonomy and growth in individual workers (Marquis & Huston, 2003). According to Tomey (2000), democratic leadership encourages

consultation among all the followers with the planning process, although the overall decision is made by the leader. This approach allows increased interaction among followers and gives the followers a sense of ownership, increased self-confidence, and motivation to continue to be actively involved. Although democratic leadership has been proven less efficient than authoritarian leadership when compared to outcome measures, it is particularly effective when cooperation and coordination between groups are necessary (Tomey, 2000; Marquis & Huston, 2003).

Laissez-faire leadership distinguishes itself from both autocratic and democratic in that it is permissive and nondirective approach (Tomey, 2000). A laissez-faire leader, according to Marquis and Huston (2003), empowers the group to achieve their goals by providing them with the ownership and responsibilities of the task at hand. This style of leadership is useful in organizations where creativity and risk taking are important. The laissez-faire leadership is usually appropriate with a group of highly motivated and skilled individual who work well together in a team. Due to the lack of direction in laissez-faire leadership, Tomey (2000) maintains this style increases disorganization and decreases cooperation during the decision making process, especially if the team is inexperienced and incapable of completing the task independently.

Leadership roles must also be considered in the discussion of factors which influence leadership development. Leadership roles identified by Marquis and Huston (2003) include: decision maker, communicator, evaluator, facilitator,

risk taker, mentor, energizer, coach, counselor, teacher, critical thinker, buffer, advocate, visionary, forecaster, influencer, creative problem solver, change agent, diplomat, and role model.

Given these multiple role options, leaders are likely to be drawn toward a particular leadership style depending on the roles that they more commonly assume and are interested in. The transactional and transformational styles developed by Bass (1990) offer comparative perspectives as to how various roles might be accomplished.

Transactional leadership, according to Bass (1990) is a directive approach, in which the leader clarifies for their followers the responsibilities required, indicates the tasks that must be accomplished, and performance objectives. In transactional leadership followers comply with the expectations of the leader in exchange for praise, rewards, and resources or the avoidance of disciplinary action (Bass, Avolio, Jung, & Berson, 2003). Transactional leadership emphasizes the process of exchange between the leader and the follower in which the leader builds trust through external rewards and provides clarifications of expectations required of the follower (Bono & Judge, 2004). Maher (1997) maintains that the transactional leadership style accepts the organizational goals and usually operates within the boundaries of an existing working system.

Schwartz and Tumblin (2002) found that many health care organizations are governed in a transactional leadership style and utilize organizational hierarchies which do not lend themselves to organizational change. Non health

care service industries, on the other hand, were found to utilize more transformational or servant leadership styles that have been found to be more effective in competing in a dynamic market economy. Wofford et al. (1998) also asserts that positive outcomes in a variety of organizational settings have been associated with the use of transformational or contingent reward leadership in successfully completing organizational goals and objectives, as well as follower satisfaction.

When using a transformational leadership style, the leader inspires a sense of importance about the organization to the follower that provides them with a sense of meaning for successful goal accomplishment (Keller, 1995). Keller (1995) also asserts that transformational leaders provide followers with a meaningful sense of the mission and higher vision, inspiring them through gaining their respect and trust by acting as role models or mentors.

Maher (1997) maintains that transformational leadership requires higher levels of motivation and morality with the higher vision in mind and that leaders with this style are more likely to assume the role of mentors. Within this style of leadership, leaders build on the initial levels of trust by establishing a deeper sense of identification among followers with respect to the organization's values and vision. This involves a process of assisting the follower in identifying his or her own personal values, and helping them connect these with the values and job requirements of the organization. This then becomes an inspirational and motivational tool for successful completion of the overall objectives of the

organization (Reiner, 2000). Schwarts and Tumblin (2002) also maintain that transformational leaders pay more attention to individual developmental, learning, and achievement needs of each subordinate.

According to Wofford et al. (1998) development of transformational leaders should be a high priority for organizations considering the supported evidence regarding performance outcomes. Leadership development intended to change behaviors should incorporate leader and follower cognitions and characteristics in order to emphasize effective and ineffective approaches currently used within their organization. For this reason, transformational leadership has been found positively related to many employee outcomes such as job satisfaction and organizational commitment.

Wofford et al. (1998) supports the need for mentoring and on-the job training as practical cognitive approaches or successful leadership development within an organization. They assert that mentors will provide future leaders with inspiration for the vision, challenge personal professional goals, provide guidance with constructive feedback and therefore model transformational leadership. While it is important for leaders to identify specific tasks and maintain interrelationships, these authors assert that it is even more important leaders be inspiring and creative in order to instill feelings of confidence, admiration and commitment in followers, and believe that flexible and innovative transformational leaders are vital for the future and success of organizations.

Furthermore, leaders may combine leadership styles depending on the external and internal stimuli they receive. Wofford et al., (1998) maintain that the cognitive processes of transformational leaders are fundamentally different from transactional leaders, but do not identify whether transformational leaders engage in transactional behaviors when appropriate. They assert that future research should examine the external situations and internal individual differences among leaders to fully understand when leaders choose to use transformational and transactional leadership.

Leaders' and subordinates' schemata variables are significant components that determine whether leaders engage in transformational or transactional leadership styles (Wofford et al., 1998). Self-schemata are derived from positive or negative feedback from various intrinsic and extrinsic stimuli during past personal and professional experiences. Schemas are associated with self perceptions and cognitive generalizations that influence feelings of self perception within followers and ultimately affect the organizations performance outcomes (Wofford et al., 1998).

The profession of occupational therapy is largely made up of women, and therefore gender issues should also be highlighted when considering leadership styles within the profession. Madsen and Blide (1992) maintain that both intrinsic and extrinsic variables affect both the professional leader and the organization. These intrinsic and extrinsic variables influence which leadership style the

individual's utilizes and their abilities to be a successful leader within health care professions.

Extrinsic variables may include historical context or factors peculiar to the interpersonal or tangible work organization. For example, women in leadership and managerial positions within the health care profession have decreased significantly since the 1940's when a shift from nurse and physician administration to non-physician administration occurred. The "glass ceiling" effect in healthcare also inhibits women from advancing in achieving professional and personal goals (Wofford et al.,1998: Madsen & Blide, 1992). Crawford (1999) asserts that it is difficult for many occupational therapists to get involved and contribute to leadership positions due the demands of the job and family life. The healthcare work environment has made increasing demands on therapists in regard to caseloads and productivity, but has offered little support for women in developing leadership roles. Therapists are often not involved in organizational strategic planning, and there are few professional role models or mentors for those women who would be interested in pursuing a leadership role.

Schwartz and Tumblin (2002) indicate that transformational leaders are more likely to present with personal characteristics of self confidence and assertiveness, which are consistent with risk taker qualities while personal characteristics present in transactional leaders may include directive, dominating, and action-oriented qualities.

Intrinsic factors are described as personal and professional perceptions or how one views their abilities and skills in relationship to being an effective leader. For many women, these intrinsic factors which make up self concept may be heavily influenced by extrinsic variables such as attitudes or values within an organization, power distribution, and vision of one's profession (Madsen & Blide, 1992).

The final test of leadership effectiveness is two-fold. It is important to consider whether the goals or vision of a particular organization or venture were met in realistic and measurable outcomes (Vance & Larson, 2002). It is also critical that subordinates are satisfied with the leadership style utilized (Wofford et al, 1998). The commitment and dedication of the subordinate and their perception of value in regards to the vision and mission of the organization is highly related to an organization's goal achievement. This is particularly important in professional organizations such as occupational therapy, which depend on volunteers to accomplish the organizational mission.

To achieve these organizational goals, the successful leader must be aware of both the intrinsic and extrinsic factors which influence his or her leadership style, and must also consider the particular goals that must be accomplished. When organizational change is indicated, a transformational style is likely warranted, and this approach would start with the leader assessing his or her own values and behaviors in order to model to the members what is expected (Schwartz & Tumblin, 2002). This type of leader would have passion and enthusiasm for

the vision and mission of the organization, and would encourage members to participate in decision making and connect with the mission and vision of the organization. In times of organizational stability, a transactional leadership style would be indicated. Within this style, the leader would clarify and support current organizational expectations, and operate within existing organizational boundaries emphasizing efficiency in task completion (Bass, 1990).

Schwartz and Tumblin (2002) assert that adaptable organizational leaders have five critically important characteristics, including “great flexibility, commitment to the individual and superior use of teams, strong core competencies, and a taste for diversity” (p. 1420). These characteristics are not inherent to the individual, but can be developed through a process which conscientiously utilizes the total resources of both the individual leader and the organization in order to accomplish the organizational objective. A successful organization results when both the leaders and the members of an organization have been mobilized to their full capacity (Bruhn, 2004).

This perspective is consistent with the process of change and adaptation that is suggested by the occupation adaptation model. This model, written by Schkade and Schultz (1992) maintains that when assuming a new occupational role, individual’s must go through a process of self assessment, where one evaluates their readiness skills needed to engage in new occupations, and analyzes environmental conditions as they evaluate effectiveness of task completion. The occupational adaptation model emphasizes development of readiness skills and

improving one's ability to adapt and evaluate occupational challenges, internal and external expectations, person and occupational environment (Schkade & Schultz, 1992).

In this model, continuously integrating new learning and evaluating outcomes are required in order to generate successful adaptive responses to one self and the environment. This process of continuing skill development and refinement through reflection and engagement at progressively more complex levels is also essential to the development of leadership skills and competencies in the occupational therapy profession. Occupational therapists might utilize this process in a variety of potential leadership environments, including an employment setting, a mentoring situation within a professional organization, or through participation in community organizations (Reimer, 2000).

There is a need for tools within the profession of occupational therapy which encourage the development of personal leadership skills, and the utilization of leadership models appropriate to the leadership task. Through the preceding literature review, a reflective workbook for occupational therapists in leadership positions within professional organizations was developed.

The expectation of the finished scholarly project is a beneficial and comprehensive reflective workbook for occupational therapists to use as a guide for organizational leadership development. This workbook is a model and resource for evaluating professional leadership development skills, and includes methods for contextual organizational assessment, as well as methods for both

implementing organizational change and maintaining organizational stability.
This workbook can be utilized at the local, state, and national levels with the occupational therapy profession to enhance and encourage leader and organizational effectiveness.

CHAPTER III

METHODOLOGY

The process of developing a model and resource for organizational leadership development for occupational therapist in professional organizations began with an extensive review of current literature. Topics of importance to this project included current professional leadership development within the occupational therapy profession, leadership within allied health care, leadership characteristics and styles, methods for organizational assessment, and strategies for implementing organizational change or sustaining organizational stability.

Search engines such as PubMed, CINAHL, and OT search were used for the literature review, focusing on the need for leadership and professional development within the occupational therapy profession and allied health. It was found that the majority of the longitudinal studies on leadership and organizational development are within the business, political, and corporate world, therefore additional library resources, textbooks and electronic journals relating to the occupational therapy practice were utilized, as well.

The literature review revealed that the healthcare work environment has made increasing demands on occupational therapists in regards to caseload and productivity, but has offered little support for therapist interested in leadership development (Crawford, 1999). Breines (1988) maintains that many leadership

positions within occupational therapy remain vacant for periods of time, or are filled with individuals who intend on temporary assistance rather than commitment to the ideals of the organization. She notes that a lack of time and resources to meet the demands of the leadership positions may be at issue, as well as feelings of inadequacy for perceived leadership roles. To accommodate this problem, a resource that promotes personal and professional organizational leadership assessment and implementation was created that will help prepare occupational therapy leaders or potential leaders to become more effective when taking on leadership roles.

The process of creating the reflective leadership workbook began with a proposed outline of the product. The workbook was then broken down into seven sections based on the pertinent literature findings on leadership and organizational assessment. The occupation adaptation model, written by Schkade and Schultz (1992) was selected as a theoretical framework and guide to creating the workbook. This model provides a structure to assist the leader in assessing occupational challenges and role expectations and to adapting leadership styles and/or contextual factors as needed. The process of reflecting on personal characteristics and organizational contexts is integral to the occupational adaptation model, and provides a framework for assessment of organizational effectiveness. Sections within the reflective workbook include: Introduction to the Leadership World, Self Assessment of Leadership Skills, Organizational

Assessment, Organizational Plan, Plan Implementation, Evaluation of Plan, and Additional Resources and References.

Introduction to the Leadership World

The first section introduces the concept of leadership and its importance for the vitality of the occupational therapy profession. According to Vance and Larson (2002) leadership can be described as the leader's ability to influence others and transform potential ideas into realistic and measurable outcomes. An acrostic chart adapted from Searcy (1999) was added to this section to help identify actions and characteristics of leadership. This section concludes with a personal call to leadership and an opportunity for individuals to consider its value in regard to their personal and professional leadership development.

Self Assessment of Leadership Skills

The second section of the reflective leadership workbook includes assessment and reflective questions that the leader answers regarding their own personal leadership qualities and characteristics, leadership skills, and personal leadership readiness skills. The questions were developed based on literature relating to the effective leader's personal characteristics, qualities, and skills, including their ability to influence others within an organizational culture (Marquis & Huston, 2003). The resulting self assessment process assists individuals to become more aware of personal leadership strengths and the areas requiring improvement.

Organizational Assessment

The organizational assessment is a critical step in leadership development. This process allows the leader to determine essential functions of the organization and evaluate contextual and environmental factors that influence organizational performance, as well as identify appropriate leadership styles to utilize within the organizational context.

The first step of organizational assessment is identifying the organization's overall essential functions by listing each organizational goal and identifying the activities required by the leader and members for successful completion of the goals. Within this step, the leader evaluates how efficiently the organization completes each organizational goal and rates their level of satisfaction as it pertains to occupational performance.

The second step is a process of organizational contextual assessment to identify the organizations current structure and environment. The literature identified that organizations are influenced by their environment and the culture surrounding the organization (Vance & Larson, 2002). The Occupational Therapy Practice Framework is used as a guide for the leader to fill out a worksheet regarding the organizations culture, physical environment, social, personal, spiritual, temporal, and virtual contextual environments (AOTA, 2002). Once the individual defines the context, the next step is classifying the context as an asset or barrier for obtaining the organizational goals. Finally the leader will reflect on what they have learned and how the contextual environment influences

whether the organization successfully carries out activities to complete organizational goals.

The transactional and transformational styles developed by Bass (1985) offer comparative perspectives as to how various occupational roles might be accomplished and appropriate leadership styles determined to fit different contextual situations. The third step of organizational assessment includes identifying the leaders preferred leadership style and evaluating the most appropriate leadership style best suited for the organization.

The transformational leadership style has been positively associated with organizational change. This style of leadership involves long term strategic planning, clear organizational mission and values, and inspiring others complete organizational goals and objectives for positive leadership effectiveness. Transformational leaders successfully change organizations by modifying strategies and activities based on the contextual environment, values/mission of the organization, and follower response. In regard to leadership traits, transformational leaders tend to be self confident, assertive, risk taking, personable, respectful of others, and able to think on their feet (Bass & Avolio, 1993).

Organizational Plan

The organizational plan is used to provide a system or process that will assist leaders in determining where the organization needs to be and identifying steps to take in order to successfully reach each organizational goal identified in

the previous organizational assessment. For each organizational goal the leader reflects back to the organizational contextual assessment and identifies the positive or negative influences of context on that goal, as well as potential strategies to overcome contextual barriers.

A number of specific strategies were identified in the literature to overcome barriers beyond addressing contextual aspects. For example, modifying the leadership style to fit the contextual needs of the organization, or providing and implementing structural support to the followers, through education, orientation, group or individual meetings, training sessions, mentorship programs, seminars, and/or lectures are viable strategies. In addition, the importance of continuous evaluation and response to the internal and external contextual factors that influence the organization is stressed throughout the workbook (Madsen & Blide, 1992).

The last step in the organizational plan is reflecting back to the organizational goals and essential functions of the organization and prioritizing the most efficient strategies for overcoming barriers. In the chart provided in this section, the leader identifies three strategic plans that will be implemented within the organization, the goals addressed in the strategic plan, and the target date of completion for each strategy (Schwartz & Tumbler, 2002).

Plan Implementation

The plan implementation is a process of identifying how each strategy will be successfully completed. An organizational plan implementation assessment

was developed for each strategic plan for the individual to identify of the key indicators for successful completion, short term goals, time lines, resources needed for each plan. The leader also has the opportunity to reflect and identify an appropriate leadership style, who will be responsible for implementation of the plan, how the leader and follower(s) will be evaluated for occupational performance, and how the strategy will be evaluated for effectiveness (Madsen & Blide, 1992; Schkade & Schultz, 1992).

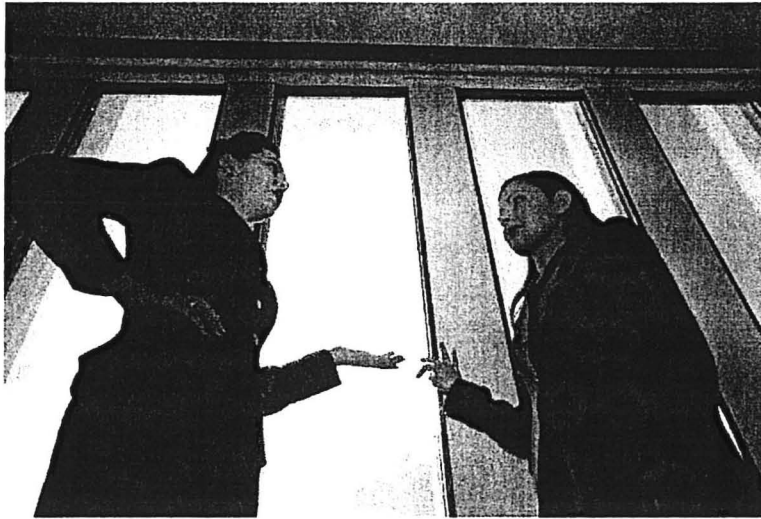
Evaluation of Plan

The sixth section of the workbook focuses on evaluation of the organizational leadership plan. Evaluation of the plan is a continuous process that adapts to the organization's changing circumstances and includes ongoing leader and organizational evaluation. The process of evaluation will assist the leader in adapting organizational objectives, priorities, and strategies as plan implementation proceeds. Continuous evaluation also facilitates efficiency in response to change if aspects of the plan are unsuccessful or inefficient (Schwartz & Tumblin, 2002).

The final section of the organizational workbook includes a list of additional resources and references on the topics of leadership development and organizational change. The information to create this workbook was taken from resources used in the literature review as well as added information found using Internet searches. The expectation of the finished scholarly project is a beneficial

and comprehensive reflective workbook for occupational therapists to use as a guide for organizational leadership development.

STEP INTO LEADERSHIP



Leadership Development Workbook for Occupational Therapist

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School of Medicine and Health Sciences

STEP INTO LEADERSHIP

1. **Introduction to the Leadership World**
 - a. Defining Leadership
 - b. Your Personal Call to Leadership
2. **Self Assessment of Leadership Skills**
 - a. STEP 1: Leadership Qualities and Characteristics
 - b. STEP 2: Leadership Skills
 - c. STEP 3: Your Personal Leadership Readiness Skills
3. **Organizational Assessment**
 - a. STEP 1: Essential Functions of the Organization
 - b. STEP 2: Organizational Structure and Environment
 - c. STEP 3: Organizational Leadership Style
4. **Organizational Plan**
 - a. STEP 1: Overcoming Contextual Barriers
 - b. STEP 2: Strategies for Organizational Leadership Plan
5. **Plan Implementation**
6. **Evaluation of Plan**
 - a. STEP 1: Evaluating Outcomes
 - b. STEP 2: Plan Revision and Adaptations
7. **Additional Resources**
8. **References**

Leadership Development



Introduction to the Leadership World

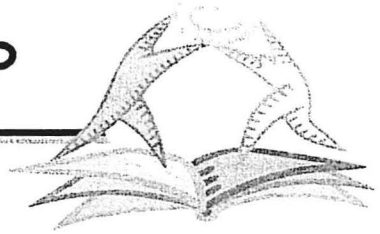
This reflective leadership workbook was written for you, a leader or potential leader within the occupational therapy profession, with the intent to provide you with a tool and guide for becoming a more confident and committed leader. The occupation adaptation model by Schkade and Schultz (2002) is used as a framework throughout this process of self improvement, organizational assessment, and professional leadership development. Self and organizational assessment is a process of identifying personal characteristics in yourself and contextual factors influencing organization performance. The process evaluates specific strengths and areas that require improvement. Before you begin this process, it is important to be familiar with the definition of leadership and the qualities, behaviors, and skills that make up an effective leader.

Although the idea and definition of leadership has changed over time, the concept is still the same. Leadership is the ability and the power to lead others. Within each individual situation and context, the style of leadership may be different. Early leadership theories have identified specific traits, characteristics, and behaviors effective leaders should possess and demonstrate. Contemporary research differs by concentrating on the leader's ability evaluate oneself and influence others within an organizational culture, while building a proactive relationship with others (Marquis & Huston, 2003).

This leadership workbook is a tool that promotes personal and professional growth while encouraging leadership development through a reflective process. This process of personal and organizational assessment is designed to prepare you to become a more effective leader.

*Leadership can be described as the leader's ability to influence others and transform potential ideas into realistic and measurable outcomes
(Vance and Larson, 2002).*

LEADERSHIP



L- Learn. Leaders continuously develop competency in the area of knowledge and skill while reflecting on past personal and professional experiences.

E- Engage. Successful leaders direct, influence, and inspire followers on an emotional level for successful task completion of realistic goals.

A- Anticipate. Effective leaders plan and expect for obstacles and challenges ahead.

D- Demonstrate. Leaders model clearly the characteristics and values that they want their followers to portray.

E- Evolve. Leaders are flexible to change and adapt to the environment. Leaders have the ability to find new ideas and options for old issues.

R- Reproduce. Leaders influence others to their highest potential.

S- Solve. Critical thinking and problem solving are essential characteristics of effective leaders. "Your ability to successfully solve problems will determine your stability. Your ability to influence others will determine your success."

H- Hope. Leaders are confident and optimistic about the idea of transforming a vision into reality.

I- Initiate. Effective leaders "take charge" and think on their feet. They have the ability to create, adapt, and improvise.

P- Persevere. Leaders never give up! Perseverance is key to successful completion of the organizations desired goals.

(The above is adapted from Searcy, 1999)

Your Personal Call To Leadership

The healthcare work environment is making increased demands on occupational therapists in regards to caseload and productivity, while offering little support to therapists interested in leadership development (Dimeo, 2002; Kornblau, 2001). Completion of this workbook will be beneficial for individuals interested in further developing leadership skills and increased feelings of self confidence in organizational situations.

ASK Yourself these Questions?

- ✦ Are you currently holding a position within a professional organization?
- ✦ Are you interested in becoming more involved within the occupational therapy profession, either at the local, state, or national level?
- ✦ Are you interested in leadership?
- ✦ Do you own a private practice?
- ✦ Do you hold a managerial position?
- ✦ Are you an occupational therapy student currently in a leadership role or interested in stepping into a leadership or management position in your future?

If you answered **YES** to any of these questions, this workbook may be a great professional leadership development tool for YOU!

This workbook will guide you through a process of self and organizational assessment that includes:

- ✦ Self Assessment of Leadership Skills
- ✦ Organizational Assessment
- ✦ Organizational Plan
- ✦ Plan Implementation
- ✦ Evaluation of Plan

Self Assessment



Self Assessment of Leadership Skills

Self assessment will require evaluation of personal qualities, characteristics, interpersonal skills, and leadership readiness skills. The assessment will assist you in learning more about yourself in order to become more aware of your leadership strengths and areas that require improvement. This process of self evaluation is an essential step to professional and organizational leadership growth.

SELF ASSESSMENT: STEP 1

LEADERSHIP QUALITIES AND CHARACTERISTICS

- ↓ Write down how you would define leadership.

- ↓ List the characteristics you feel describe an effective leader?
Personal Characteristics: _____

Knowledge: _____

Interpersonal Skills/ Attitude: _____

Leaders Image: _____

Other: _____

↓ Describe how you model your definition of leadership within the organization, professional interactions, and personal life?

↓ Identify a leader in your personal life or professional career that has inspired and motivated you to perform extraordinarily. Identify the leaders' characteristics and actions below:

↓ How did this leader establish trust and motivate others?

↓ Describe how this leader challenged and influenced yourself or other individuals to achieve the targeted goal(s).

In the following table, check the leadership qualities and characteristics that are your strengths or areas that need improving in order to become a more effective leader:

Leadership Qualities	Strength	Needs Improving
Adaptable		
Ambitious		
Caring		
Confident		
Convincing		
Courageous		
Creative		
Curious		
Decisive		
Discerning		
Empathetic		
Ethical		
Fair		
Honest		
Innovative		
Organized		
Persistent		
Responsible		
Self-directing		

(The above is adapted from Ponder, 1998)

↓ What are the most relevant qualities needed for your present leadership position:

SELF ASSESSMENT: STEP 2

LEADERSHIP SKILLS

Effective communication along with interpersonal and organizational skills are necessary for member satisfaction and completion of organizational goals.

✦ Check all the areas where you wish to become more effective:

- Presentation skills (talking to a small group)
- Presentation Skills (talking to a large group)
- Facilitating group discussions
- Facilitating group decision-making
- Facilitating communication of topics of controversy
- Conducting Effective Meetings
- Communicating boundaries effectively to others
- Relating to your audience(s)
- Understanding non-verbal communication
- Demonstrating appropriate non-verbal communication
- Making eye contact
- Expressing yourself honestly
- Asserting needs appropriately
- Giving constructive criticism
- Receiving constructive criticism
- Improving listening and feedback skills
- Communicating with difficult individuals
- Resolving conflicts effectively and mediating a difficult situation
- Diffusing anger and frustration
- Writing and prioritizing measurable goals
- Motivating others to change behaviors and perform their best
- Delegating tasks to other
- Hearing individuals with empathy
- Avoiding judgments and stereotypes

(The above is adapted from MacGregor, 2000)

-
- ↓ List your three greatest assets or strengths within the area of communication skills?
- 1) _____
- 2) _____
- 3) _____
- ↓ List your three greatest assets or strengths within the area of observation skills?
- 1) _____
- 2) _____
- 3) _____
- ↓ List your three greatest assets/strengths within the area of problem solving skills?
- 1) _____
- 2) _____
- 3) _____
- ↓ List your three greatest assets or strengths within the area of social relationships?
- 1) _____
- 2) _____
- 3) _____
- ↓ Identify three qualities or characteristics that need improvement in order for you to become a more effective leader?
- 1) _____
- 2) _____
- 3) _____

SELF ASSESSMENT: STEP 3

Your Personal Leadership Readiness Skills

Take Charge of your own professional leadership development. It is your responsibility to take steps to increase your own self-insight by assessing and evaluating your personal and professional strengths and limitations.

- ⚡ Reflect on your past and present leadership and employment experiences. Write down the positive and negative experiences you have influenced your leadership skills.

Positive Experiences:

🕒 Present: _____

🕒 Past: _____

Negative Experiences:

🕒 Present: _____

🕒 Past: _____

- ⚡ What skills have you gained from past leadership and employment experiences that are needed for your current leadership position?

- ⚡ Engaging in activities that are meaningful to you will increase your participation and motivation to successfully complete desired goals. Identify your personal interests and what motivates you:

‡ Does your involvement or work within the organization give you feelings of personal accomplishment? YES / NO

Explain:

‡ Identify three personal values:

1) _____
2) _____
3) _____

‡ Are your values congruent with the organizations values? YES / NO
‡ If NO)

Why would having different values than the organization make a difference in self motivation and inspiring others?

Check all the areas where you wish to become more effective:

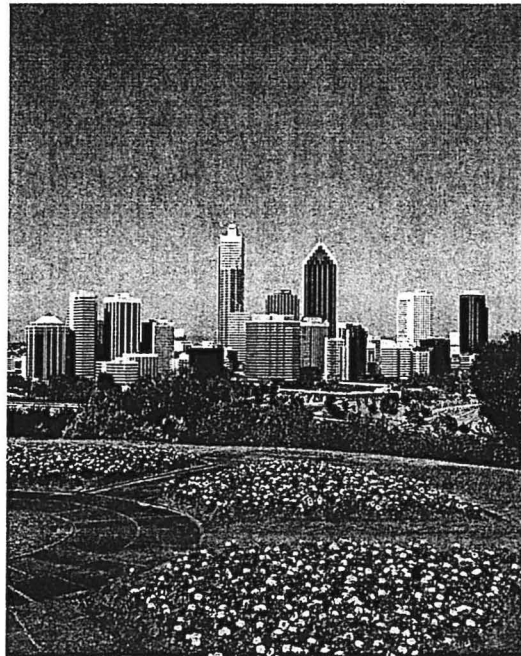
- Balancing career and personal life
- Establishing and prioritizing goals
- Improving human relation and communication skills
- Managing time
- Delegating tasks to others
- Learning to recognize and handle stress

‡ WHAT DID YOU LEARN ABOUT YOURSELF FROM THE ABOVE RESPONSES?

ONLY YOU CAN MAKE THE DIFFERENCE IN YOURSELF!!

Leadership Self Assessment Notes:

Organizational Assessment



Organizational Assessment

Organizational assessment is critical in obtaining the essential functions of the organization by identifying the contextual and environmental factors that influence organizational performance. This assessment will assist you in identifying the essential functions or goals, as well as, the organizational structure and environment. This process bridges the gap between the present and future state of the organization.

THE ORGANIZATIONAL ASSESSMENT PROCESS ALLOWS YOU TO IDENTIFY:

STEP 1: Essential Functions of the Organizations

- ✦ Organizational Goals.
- ✦ Activities Required for Successful Completion of Essential Functions
- ✦ Efficiency of the Organization in Successful Completion of Goals.
- ✦ Satisfaction Level of Occupational Performance of Members and Goal Completion

STEP 2: Organizational Structure and Environment

- ✦ The Organizations Context: Using the Occupational Therapy Practice Framework as a Guide to Evaluate the Culture, Physical Environment, Social, Personal, Spiritual, Temporal, and Virtual Context of the Organization
- ✦ Assets and Barriers of the Contextual Environment as it pertains to completion of the essential functions of the organization.

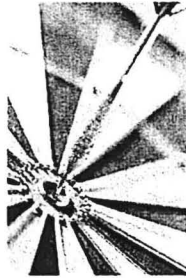
STEP 3: Leadership Styles Utilized within the Organization

- ✦ Transactional vs Transformational Leadership Styles

ORGANIZATIONAL ASSESSMENT: STEP 1 (A)

Organizations Essential Functions

Essential functions within your professional organization are goals, activities, and/or actions that must be executed to fulfill the purpose of the organization. This section of the organizational assessment tool focuses on identifying the essential functions of the organization by listing goals and identifying the activities required by the leader and members for successful completion of each goal. Particularly this step gives you an opportunity to evaluate the efficiency of the organizational goal completion, as well as, determines your level satisfaction as it pertains to occupational performance.



Identify five organizational goals

- 1) _____

- 2) _____

- 3) _____

- 4) _____

- 5) _____

Review the assessment form below. First, list the organizational goals in the first column. Next, list the activities or actions that need to be performed by the leader and members in order for the goals to be reached.

Organization's Goals	Activities and Actions for Achieving the Goal
#1	<p>Leaders</p> <p>1) _____</p> <p>2) _____</p> <p>3) _____</p> <p>4) _____</p> <p>5) _____</p> <p>Members</p> <p>1) _____</p> <p>2) _____</p> <p>3) _____</p> <p>4) _____</p> <p>5) _____</p>
#2	<p>Leaders</p> <p>1) _____</p> <p>2) _____</p> <p>3) _____</p> <p>4) _____</p> <p>5) _____</p> <p>Members</p> <p>1) _____</p> <p>2) _____</p> <p>3) _____</p> <p>4) _____</p> <p>5) _____</p>

<p>#3</p>	<p>Leaders</p> <p>1) _____</p> <p>2) _____</p> <p>3) _____</p> <p>4) _____</p> <p>5) _____</p> <p>Members</p> <p>1) _____</p> <p>2) _____</p> <p>3) _____</p> <p>4) _____</p> <p>5) _____</p>
<p>#4</p>	<p>Leaders</p> <p>1) _____</p> <p>2) _____</p> <p>3) _____</p> <p>4) _____</p> <p>5) _____</p> <p>Members</p> <p>1) _____</p> <p>2) _____</p> <p>3) _____</p> <p>4) _____</p> <p>5) _____</p>
<p>#5</p>	<p>Leaders</p> <p>1) _____</p> <p>2) _____</p> <p>3) _____</p> <p>4) _____</p> <p>5) _____</p> <p>Members</p> <p>1) _____</p> <p>2) _____</p> <p>3) _____</p> <p>4) _____</p> <p>5) _____</p>

ORGANIZATIONAL ASSESSMENT: STEP 1 (B)

Organizational Efficiency and Satisfaction

In the following organizational assessment form, on the following page, rate the efficiency and satisfaction level of your organization in each of the goals listed above.



1) PLACE EACH ORGANIZATIONAL GOAL IN COLUMN ONE

2) RATE HOW EFFECTIVE THE ORGANIZATION IS IN COMPLETING EACH ORGANIZATIONAL GOAL NECESSARY FOR SUCCESSFUL ADVANCEMENT OF THE ORGANIZATION.

FOR EXAMPLE: Is the goal completed in a timely and appropriate manner? Are the tasks organized and accomplished with high quality? Is there an appropriate amount of information exchange and communication amongst the individuals involved? Are the tasks equally divided amongst members?

1= Inefficient	2=Below Average	3=Average	4=Above Average	5= Efficient
----------------	-----------------	-----------	-----------------	--------------

3) IN THE SPACE PROVIDED UNDER THE EFFICIENCY RATING SCALE, JUSTIFY YOUR RATING.

Identify areas that could be improved for each organizational goal to make your organization more efficient

4) RATE YOUR LEVEL OF SATISFACTION WITH EACH ORGANIZATIONAL GOAL.

FOR EXAMPLE: How satisfied with your organization are you considering the contextual and organizational factors that influence goals and objectives? (Involvement and dedication of leaders and members, organization and task completion, communication, training or orientation provided, mentorship or modeling provided that influence successful completion of goals and objectives)

1= Not Satisfied	2=Below Average	3=Average	4=Above Average	5= Satisfied
------------------	-----------------	-----------	-----------------	--------------

5) IN THE SPACE PROVIDED UNDER THE SATISFACTION RATING SCALE, JUSTIFY YOUR RATING.

Identify areas that could be improved for each organizational goal to increase the overall satisfaction of the organization.

Organizational Efficiency and Satisfaction Assessment

Goal	<u>Rate Efficiency & Justify Rating</u>	<u>Rate Satisfaction & Justify Rating</u>
#1	1 2 3 4 5 Justify Rating:	1 2 3 4 5 Justify Rating:
#2	1 2 3 4 5 Justify Rating:	1 2 3 4 5 Justify Rating:
#3	1 2 3 4 5 Justify Rating:	1 2 3 4 5 Justify Rating:
#4	1 2 3 4 5 Justify Rating:	1 2 3 4 5 Justify Rating:
#5	1 2 3 4 5 Justify Rating:	1 2 3 4 5 Justify Rating:

ORGANIZATIONAL ASSESSMENT: STEP 2

Organizational Structure and Environment

Organizations are influenced by their environment and the culture in which they are in. The organizational environment is a key factor in determining the level of available resources and the ease with which an organization can carry out activities to complete organizational goals. Characteristics and qualities of the environment can either promote essential functions and organizational goals or act as a barrier for successful completion.

The organizational contextual assessment process is customized to identify the structure and environment of your organization as it applies to contextual situation. Through this process you will have a better idea of the contextual assets to the organization and impede performance and need to be addressed in your organizational plan. The Occupational Therapy Practice Framework (AOTA, 2002) is used as a guide to evaluate the organizations culture, physical environment, social, personal, spiritual, temporal, and virtual contextual environments.

Organizational Contextual Assessment

- ✦ The first step in this process is defining the context and environment within the organization.
- ✦ Second, classify the context as an asset or barrier for obtaining the organization's goals.
- ✦ Finally, evaluate what you learned about how the contextual environment influences the organization

Organizational Contextual Assessment

<u>Culture Context</u>	<u>Define the Culture within the Organization</u>	<u>Asset</u>	<u>Barrier</u>
Define the Purpose of the organization: Mission Statement			
Values: Organizations Leaders Members			
Define the Organizations Policies:			
Procedures/ Activities Required to Complete Mission Statement:			

EVALUATE HOW THE CULTURAL CONTEXT INFLUENCES THE ORGANIZATION:

Organizational Contextual Assessment

<u>Physical Context</u>	<u>Define the Physical Context within the Organization</u>	<u>Asset</u>	<u>Barrier</u>
Organizations Physical Environment: Location/Place Size			
Resources Needed: Financial Means Furniture Office Supplies Technology Tools			
EVALUATE HOW THE PHYSICAL CONTEXT INFLUENCES THE ORGANIZATION:			

Organizational Contextual Assessment

<u>Social Context</u>	<u>Define the Social Context within the Organization</u>	<u>Asset</u>	<u>Barrier</u>
Social Relationships:			
Valued Norms of the Members:			
Social Support:			
Political, economic, and institutional responsibilities:			

EVALUATE HOW THE SOCIAL CONTEXT INFLUENCES THE ORGANIZATION:

Organizational Contextual Assessment

<u>Personal Context</u>	<u>Define the Personal Context within the Organization</u>	<u>Asset</u>	<u>Barrier</u>
Average Age of Members			
Average Gender			
Racial/Ethnic Group(s)			
Educational Background			
Socio-Economic Status			
Cultural Background Leader Member			
Member Participation			

EVALUATE HOW THE PERSONAL CONTEXT INFLUENCES THE ORGANIZATION:

Organizational Contextual Assessment

<u>Spiritual Context</u>	<u>Define the Spiritual Context within the Organization</u>	<u>Asset</u>	<u>Barrier</u>
What Motivates and Inspires the Leader? Values Incentives Rewards			
What Motivates and Inspires team Members? Values Incentives Rewards			

EVALUATE HOW THE SPIRITUAL CONTEXT INFLUENCES THE ORGANIZATION:

Organizational Contextual Assessment

<u>Temporal Context</u>	<u>Define the Temporal Context within the Organization</u>	<u>Asset</u>	<u>Barrier</u>
Meeting Times Time: Day/Night Day of Week			
Time Demands Meetings Activities Paper Work			
Stage of Life and Additional Demands Leaders Members			

EVALUATE HOW TEMPORAL CONTEXT INFLUENCES THE ORGANIZATION:

Organizational Contextual Assessment

<u>Virtual Context</u>	<u>Define the Virtual Context within the Organization</u>	<u>Asset</u>	<u>Barrier</u>
Communication Phone Radio Computers Internet Web Pages E-mail Chat Rooms Word Processing			

EVALUATE HOW VIRTUAL CONTEXT INFLUENCES THE ORGANIZATION:

† From the responses above, what did you learn about the organizations contextual factors that influence the ability for the leader and/or members to successfully complete the organization's goals?

ORGANIZATIONAL ASSESSMENT: STEP 3

Organizational Leadership Style



Organizational leadership is based on research from several leadership theories and styles that leaders use as a guide for successfully achieving the organization's overall mission and goals. The characteristics of transactional and transformational leadership styles are utilized to best determine appropriate behaviors and approaches for transforming change or maintaining stability within the organization (Bass & Avolio, 1993). The transactional and transformational styles developed by Bass (1985) offer comparative perspectives as to how various roles might be accomplished and determine the appropriate style to use to fit different contextual situations.

This organizational leadership style assessment is a process of identifying your own personal leadership style (Transformational or Transactional) and determining what is best suited for your organizational context.

Transformational leadership:

1. Democratic leadership style
2. Motivates others by creating a commitment to the shared vision of the organization
3. Directs efforts through the mission and vision of the organization
4. Uses charisma, inspiration, and intellectual stimulation to lead others
5. Lead by example and gains respect and trust by acting as role models and/or mentors

Transformational leadership style is best used when an organization requires organizational change. This style of leadership involves long-term strategic planning, clear organizational mission and values, and inspiration of others for positive leadership effectiveness. Transformational leaders successfully change organizations by modifying strategies and activities based on the contextual environment, follower response, the leader and member's values, and mission of the organization. Transformational leaders tend to be self confident, assertive, personable and respectful, while being able to take risks and think on their feet.

Transactional leadership:

1. Authoritarian leadership style
2. Directs and clarifies for their followers the responsibilities required
3. Focuses on task completion
4. Supports organizational goals and objectives
5. Use of positive rewards and extrinsic motivators

Transactional leadership style is best used when maintaining organizational stability within the organization. A transactional leader accepts organizational goals and usually operates within the boundaries of the existing working system. This style of leadership focuses on procedures and meeting organizational goals efficiently. In transactional leadership, followers comply with the expectations of the leader for either exchange of praise, rewards, and resources or the avoidance of disciplinary action. Transactional leaders tend to be action and goal oriented, directive, assertive, organized, and dominating.

(Bass, 1985; Bass & Avolio, 1993; Maher, 1997; Schwartz & Tumblyn, 2002; Toney, 2000)

ANSWER THE FOLLOWING QUESTIONS

↓ **How do you demonstrate transformational leadership style?**

↓ **How do you demonstrate transactional leadership style?**

‡ Is your organization in a position of maintaining organizational Stability? (ie. all the goals are being met efficiently and everyone is completely satisfied with the organizational outcomes.)
YES / NO

‡ Could the organization benefit from organizational change?
YES / NO

Explain:

‡ Explain how the transformation leadership style could be used within your organization. How would it fit the organization's contextual and situational needs?

‡ Explain how the transactional leadership style could be used within your organization. How would it fit the organization's contextual and situational needs?

‡ Do you demonstrate characteristics of the appropriate leadership style for your organization?

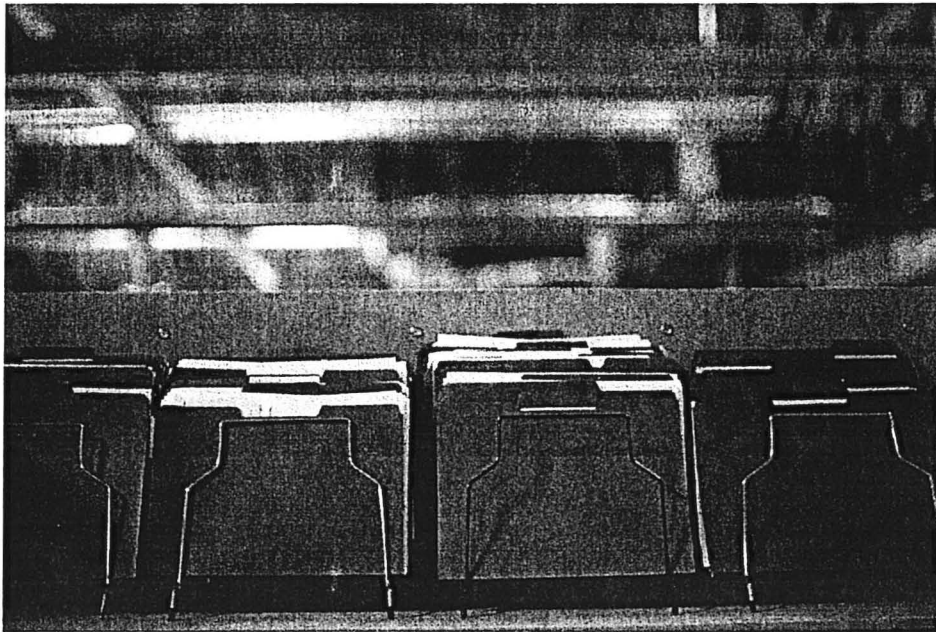
YES / NO

Explain:

‡ Reflect on the leadership styles and questions answered Above: What are your next steps to becoming a more effective leader within your organization?

Organizational Assessment Notes:

Organizational Plan



Organizational Plan

An organizational plan will provide a system or process that assists in determining organizational goals and identifying necessary steps to reach each goal. Through this process, you have already assessed your own personal leadership readiness skills by identifying personal characteristics and skills that are strengths, as well as, identifying areas needing improvement and growth in order to become a more effective leader. You have also completed the process of organizational assessment by identifying essential functions or goals that need to be met along with rating efficiency and satisfaction level of each goal. Next the organizational contextual factors were identified and evaluated as being barriers or assets to the organization. Finally you have been introduced to transformational and transactional leadership styles. You have identified the style you currently use within your organization and identified what style is most appropriate within the contextual environment of the organization.



The process continues by evaluating contextual barriers present for each organizational goal. By doing this, you will be able to develop strategies and outcomes to better achieve the overall organization's mission. This step-by-step planning process allows you to break down each component and identify desired outcomes to make the goals manageable and less overwhelming.

ORGANIZATIONAL PLAN: STEP 1

Overcoming Barriers

Complete the following forms on the following pages for each organizational goal identified:

1. Place the organizational goal on top of each table
2. In Column One:
Go back to Organizational Contextual Assessment and identify if the context is an asset or barrier to the completion of the goal (AOTA, 2002)
3. In Column Two:
If you checked the contextual factor as a barrier to the goal:
List strategies that can be used to decrease organizational barriers pertinent to each goal

Things to consider when determining the most appropriate strategy to use in reducing organizational contextual barriers include:

- ‡ **CHANGING THE LEADER'S CHARACTERISTICS AND/OR STYLE**
 - 🌐 Improving Leaders: Enthusiasm for the vision and mission of the organization, Self-Confidence, Communication Skills, Assertiveness Skills, Knowledge, Competency, Problem Solving Skills, etc.
 - 🌐 Appropriate use of Transformational and Transactional Leadership Style: Transformational (Ex. Inspiring, Motivating, Facilitating, Supporting), Transactional (Ex. Managing, Directing, Delegating)

- ‡ **PROVIDING AND IMPLEMENTING SUPPORT FOR FOLLOWERS**
 - 🌐 Provide:
Education, Orientation Programs, Group/Professional Meetings, Mentoring, Training Programs, Seminars, Lectures/ In-Services, Conferences, Technology Training.

- ‡ **RESPONDING TO INTERNAL AND EXTERNAL CONTEXTUAL FACTORS THAT EFFECT THE ORGANIZATION**

(Schwartz & Tumbler, 2002; Toney, 2000)

Overcoming Barriers

GOAL #1:	
Contextual Factors	Strategies to Overcome Barrier
<u>Cultural Context</u> Asset <input type="checkbox"/> Barrier <input type="checkbox"/>	
<u>Physical Context</u> Asset <input type="checkbox"/> Barrier <input type="checkbox"/>	
<u>Social Context</u> Asset <input type="checkbox"/> Barrier <input type="checkbox"/>	
<u>Personal Context</u> Asset <input type="checkbox"/> Barrier <input type="checkbox"/>	
<u>Spiritual Context</u> Asset <input type="checkbox"/> Barrier <input type="checkbox"/>	
<u>Temporal Context</u> Asset <input type="checkbox"/> Barrier <input type="checkbox"/>	
<u>Virtual Context</u> Asset <input type="checkbox"/> Barrier <input type="checkbox"/>	

Overcoming Barriers

GOAL #2:	
Contextual Factors	Strategies to Overcome Barrier
<u>Cultural Context</u> Asset <input type="checkbox"/> Barrier <input type="checkbox"/>	
<u>Physical Context</u> Asset <input type="checkbox"/> Barrier <input type="checkbox"/>	
<u>Social Context</u> Asset <input type="checkbox"/> Barrier <input type="checkbox"/>	
<u>Personal Context</u> Asset <input type="checkbox"/> Barrier <input type="checkbox"/>	
<u>Spiritual Context</u> Asset <input type="checkbox"/> Barrier <input type="checkbox"/>	
<u>Temporal Context</u> Asset <input type="checkbox"/> Barrier <input type="checkbox"/>	
<u>Virtual Context</u> Asset <input type="checkbox"/> Barrier <input type="checkbox"/>	

Overcoming Barriers

GOAL #3:	
Contextual Factors	Strategies to Overcome Barrier
<u>Cultural Context</u> Asset <input type="checkbox"/> Barrier <input type="checkbox"/>	
<u>Physical Context</u> Asset <input type="checkbox"/> Barrier <input type="checkbox"/>	
<u>Social Context</u> Asset <input type="checkbox"/> Barrier <input type="checkbox"/>	
<u>Personal Context</u> Asset <input type="checkbox"/> Barrier <input type="checkbox"/>	
<u>Spiritual Context</u> Asset <input type="checkbox"/> Barrier <input type="checkbox"/>	
<u>Temporal Context</u> Asset <input type="checkbox"/> Barrier <input type="checkbox"/>	
<u>Virtual Context</u> Asset <input type="checkbox"/> Barrier <input type="checkbox"/>	

Overcoming Barriers

GOAL #4:	
Contextual Factors	Strategies to Overcome Barrier
<u>Cultural Context</u> Asset <input type="checkbox"/> Barrier <input type="checkbox"/>	
<u>Physical Context</u> Asset <input type="checkbox"/> Barrier <input type="checkbox"/>	
<u>Social Context</u> Asset <input type="checkbox"/> Barrier <input type="checkbox"/>	
<u>Personal Context</u> Asset <input type="checkbox"/> Barrier <input type="checkbox"/>	
<u>Spiritual Context</u> Asset <input type="checkbox"/> Barrier <input type="checkbox"/>	
<u>Temporal Context</u> Asset <input type="checkbox"/> Barrier <input type="checkbox"/>	
<u>Virtual Context</u> Asset <input type="checkbox"/> Barrier <input type="checkbox"/>	

Overcoming Barriers

GOAL #5:	
Contextual Factors	Strategies to Overcome Barrier
<u>Cultural Context</u> Asset <input type="checkbox"/> Barrier <input type="checkbox"/>	
<u>Physical Context</u> Asset <input type="checkbox"/> Barrier <input type="checkbox"/>	
<u>Social Context</u> Asset <input type="checkbox"/> Barrier <input type="checkbox"/>	
<u>Personal Context</u> Asset <input type="checkbox"/> Barrier <input type="checkbox"/>	
<u>Spiritual Context</u> Asset <input type="checkbox"/> Barrier <input type="checkbox"/>	
<u>Temporal Context</u> Asset <input type="checkbox"/> Barrier <input type="checkbox"/>	
<u>Virtual Context</u> Asset <input type="checkbox"/> Barrier <input type="checkbox"/>	

ORGANIZATIONAL PLAN: STEP 2

Strategies for Organizational Leadership Plan

In the following section, you evaluated the contextual organizational environment. You identified whether each context acted as an asset or barrier for organizational goals identified. You also were able to suggest strategies that could be implemented to assist in reducing or overcoming these barriers.

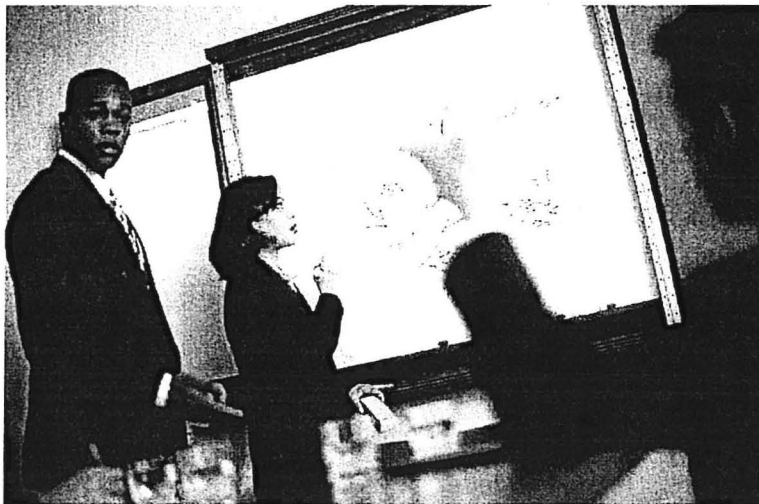
PRIORITIZING

Prioritizing goals and essential functions of the organization is the next step to overcoming contextual barriers that interfere with reaching organizational goals. In the following chart, identify three strategic plans that can be implemented within your organization to benefit efficiency of goal completion and increase overall satisfaction amongst yourself, members, and stakeholders. Identify the goals that each plan addresses in column two and, and choose a target date of completion for each strategy and place in column three.

<u>Organizational Plan</u>	<u>Goals Addressed</u>	<u>Target Date</u>
Strategic Plan 1:		
Strategic Plan 2:		
Strategic Plan 3:		

Organizational Plan Notes:

Plan Implementation

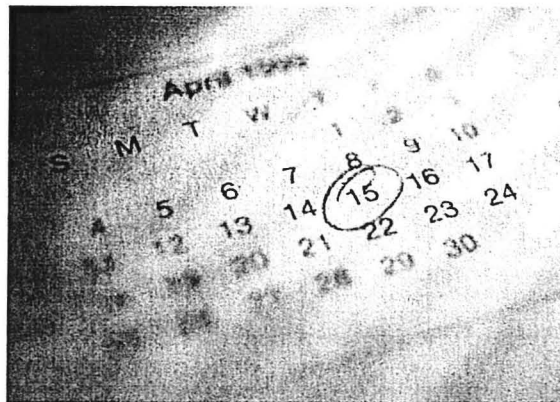


Plan Implementation

Now that you have completed the personal and organizational assessment and prioritized three strategic plans to make your organization more effective in achieving desired goals, the next step in the process is identifying how each strategy will be successfully completed.

Answer the following questions in each chart below and use them as a guide for organizing and completing each strategy.

Once you have completed the plan implementation process for each strategic plan, mark the targeted dates of each strategic plan and short term goals on your calendar. When these dates arrive continue to the next step for evaluation of the organizational plan.



GOOD LUCK!!

Strategic Plan 1:

What are the key indicators for successful completion of this plan?

Identify three short term goals to accomplish strategic plan #1:

1)

2)

3)

Time lines for completion of each short term goal:

1)

2)

3)

What are the resources needed (cost, time, materials, etc.) for each short term goal?

STG #1)

STG #1)

STG #3)

What leadership styles will be most effective?
Explain:

What are the indicators for successful implementation given this leadership style?

Who will be responsible for implementing this strategy?

How will leader and member performance be evaluated?

How will this strategy be evaluated for effectiveness?

Strategic Plan 2:

What are the key indicators for successful completion of this plan?

Identify three short term goals to accomplish strategic plan #2:

1)

2)

3)

Time lines for completion of each short term goal:

1)

2)

3)

What are the resources needed (cost, time, materials, etc.) for each short term goal?

STG #1)

STG #1)

STG #3)

What leadership styles will be most effective?

Explain:

What are the indicators for successful implementation given this leadership style?

Who will be responsible for implementing this strategy?

How will leader and member performance be evaluated?

How will this strategy be evaluated for effectiveness?

Strategic Plan 3:

What are the key indicators for successful completion of this plan?

Identify three short term goals to accomplish strategic plan #3:

1)

2)

3)

Time lines for completion of each short term goal:

1)

2)

3)

What are the resources needed (cost, time, materials, etc.) for each short term goal?

STG #1)

STG #1)

STG #3)

What leadership styles will be most effective?
Explain:

What are the indicators for successful implementation given this leadership style?

Who will be responsible for implementing this strategy?

How will leader and member performance be evaluated?

How will this strategy be evaluated for effectiveness?

Plan Implementation Notes:

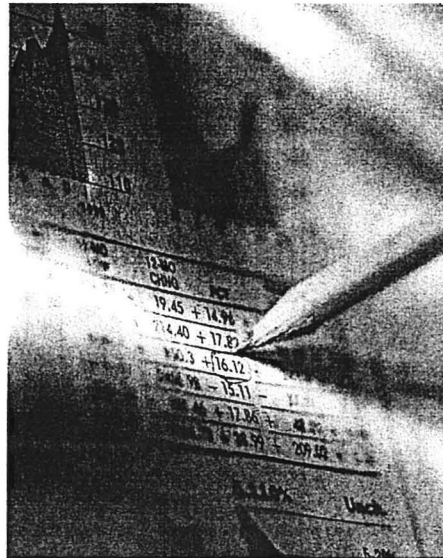
Evaluation Of Plan



Evaluation of Plan

STEP 1: Evaluate Outcomes

The evaluation process of the executed strategic plan will be conducted through a continuous process that measures and determines the extent to which the plan has met organizational goals. Other ideas for evaluation may be utilized including observations by the leader or member(s), meetings or interviews, as well as satisfaction and effectiveness surveys.



The following pages contain a template for evaluating each strategic plan. Copy the strategic plan evaluation before starting. Answer the questions by identifying and evaluating areas that were successful, as well as areas needing improvement during the plan implementation for each strategic plan.

Strategic Plan # _____

Goal #1: _____

Was Goal #1 accomplished? YES/ NO

Explain:

Within the timelines designated? YES/ NO

Strengths:

Areas Needing Improvement:

Where the resources needed available and useful?

Goal #2: _____

Was Goal #2 accomplished? YES/ NO

Explain:

Within the timelines designated? YES/ NO

Strengths:

Areas Needing Improvement:

Where the resources needed available and useful?

Goal #3: _____

Was Goal #3 accomplished? YES/ NO

Explain:

Within the timelines designated? YES/ NO

Strengths:

Areas Needing Improvement:

Where the resources needed available and useful?

Member Performance:

MEMBER

RESPONSIBILITIES

1) _____

Was the task(s) successful completed?

Describe members' performance?

What style of leadership would be most effective for this member? Explain:



2) _____

Was the task(s) successful completed?

Describe members' performance?

What style of leadership would be most effective for this member? Explain:

MEMBER

RESPONSIBILITY

3) _____

Was the task(s) successful completed?

Describe members' performance?

What style of leadership would be most effective for this member? Explain:



4) _____

Was the task(s) successful completed?

Describe members' performance?

What style of leadership would be most effective for this member? Explain:

MEMBER

RESPONSIBILITY

6) _____

Was the task(s) successful completed?

Describe members' performance?

What style of leadership would be most effective for this member? Explain:



What did you learn from completing the member performance chart above?

Leadership Style:

Was your leadership style you utilized effective? YES/ NO
Explain?

Did you have to change your leadership style throughout this
process? YES/ NO
If YES, Why?

If YES, How would you describe the process of changing your
style of leadership to react to internal and external factors
influencing the organization?

Was it difficult or easy for you to change? Explain

What did you learn about yourself from completing the organizational plan?

EVALUATION OF PLAN: STEP 2

Plan Revision and Adaptations

Evaluation of organizational leadership plan is a continuous process that adapts to the organization's changing circumstances. An effective and honest evaluation will assist you in adapting organizational objectives, priorities, and strategies as modification of plan implementation proceeds. Continuous personal and organizational evaluation also facilitates making changes if aspects of the plan are unsuccessful or inefficient.

What did you learn about yourself?

What leadership characteristics or behaviors do you need to work on to become more effective leader in the future?

What did you learn about your organization's contexts that interfere with successful completion of each strategic plan?

Strategic Plan #1

Strategic Plan #2

Strategic Plan #3

Describe how you would respond to organizational contextual barriers now that you are more aware of their impacts?

What will you do in the future to increase member performance?

List how will you inspire members to be connected to the organizations mission and vision in the future:

Identify types of motivators or rewards you will use to increase member satisfaction in the future:

List what do you need to continue working on for further leadership development?



CONGRATUALATIONS!!!!



Your organization has the opportunity to benefit from you perseverance and willingness to reflect, improve, and change you personal and professional qualities as a leader!!

ADDITIONAL RESOURCES

INTERNET RESOURCES



- # **Center for Creative Leadership**
<http://www.ccl.org/leadership/index.aspx>
- # **Covey Leadership Center**
<http://www.franklincovey.com/education/index.html>
- # **Dear to Lead**
[www.dynamic leadership.com](http://www.dynamicleadership.com)
- # **Emergingleader.com**
<http://www.emergingleader.com>
- # **Envision Leadership**
<http://www.envisionleadership.com/index.htm>
- # **Growing Leaders**
<http://www.growingleaders.com>
- # **International Leadership Association**
<http://www.academy.umd.edu/ila/>
- # **Leadership and the Face of Change**
www.lead_edge.com
- # **The Community Leadership Association**
<http://www.communityleadership.org>
- # **The Leadership Challenge**
<http://www.theleadershipchallenge.com>

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CHAPTER V

SUMMARY

The vitality of the occupational therapy profession depends upon an increase in professional leadership and professional activity. The healthcare work environment has made increasing demands on occupational therapists in regards to caseload and productivity, but has offered little support for therapists interested in leadership development (Crawford, 1999). This *Leadership Development Workbook for Occupational Therapists* is intended to provide occupational therapists with a model and resource to support involvement and increase feelings of self-confidence in leadership roles.

The occupation adaptation model, written by Schkade and Schultz (1992) was the theoretical framework utilized to create this model and is used as a guide to evaluate assessment of organizational effectiveness. This model provides a structure to assist the leader in assessing occupational challenges and role expectations and adapting leadership styles and/or contextual factors as needed.

The *Leadership Development Workbook for Occupational Therapists* is a process of self assessment, organizational assessment, development of an organizational plan, plan implementation, and evaluation and adaptation of plan. This workbook contains seven separate sections to be followed in consecutive order based of the occupation adaptation model and pertinent literature findings

on leadership and organizational assessment. The purpose of the first section is to introduce leadership and pertinence of leadership within the occupational therapy profession. The self assessment is a process of identifying and evaluating individual personal leadership qualities and characteristics, leadership skills, and leadership readiness skills. The organizational assessment consists of determining essential functions of the organization and evaluating contextual and environmental factors that influence organizational performance. This section assists the individual in identify appropriate leadership styles to utilize within the organizational context. The organizational plan guides the leader in determining where the organization needs to be and identifying steps to take in order to successfully reach each organizational goal. Section five assists the leader in identifying potential strategies to implement for completion of each strategic plan. Evaluation of the plan is the final process and guides the leader in identifying how efficient and effective the plan implementation process went. This process also assists the leader in identifying adaptations that could be changed to best meet the overall essential functions of the organization, such as revising organizational objectives, prioritizing organizational tasks, and developing or changing specific strategies. The last section included additional resources and references on the topics of leadership development and organizational change.

It is intended that this leadership workbook be utilized by leaders or potential leaders at the local, state, and national levels within the occupational therapy profession to enhance active participation and increase leadership

development and organizational effectiveness. The workbook can be implemented to leaders or potential leaders amongst local, state, and national professional organizations. This tool can also be beneficial for individuals in managerial positions or owners of private practices due to the reflection and implementation of an organizational strategic plan process. Based off the need for professional leadership development at the student level, this leadership development workbook can be implemented within an occupational therapy curriculum or utilized by students in leadership roles or interested in acquiring a leadership role in the future.

The goal of this workbook is to serve as a guide for potential leaders to explore their personal leadership skills and organizational context. It is important, however, to remember that each individual is unique and each organizational context has various internal and external variables that may influence organizational performance. Since this workbook has not been implemented, modifications to the context may be required.

It is recommended that further research be completed on the effectiveness and the efficiency of this reflective workbook in promotion of leadership development.

This workbook is a model and resource for evaluating professional leadership development skills, and includes methods for contextual organizational assessment, as well as methods for both implementing organizational change and maintaining organizational stability. *The Leadership Development Workbook for Occupational Therapists* can be utilized at the local, state, and national levels

within the occupational therapy profession to enhance and encourage leadership development and organizational effectiveness.

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