









Handout for the Therapro webinar ***Supervision & Management for the Occupational Therapist***
presented by Kate Barlow, OTD, MS, OTR/L - December 1, 2020



Dr. Tina Champagne, OTD,
OTR/L, CCAP, FAOTA


Dr. Allison Sullivan,
DOT, MS, OTR/L

Dr. Sarah OTD, OTR/L,
BCPR, MPA

Colleen Cameron
Whiting, MS, OTR/L

OT LEADERSHIP ROLES

- Mentoring
- AOTPA Ambassador or Regional Director
- MAOT Board, Conference Chairs & Presenters
- MAOT & AOTA SIG Chairs
- Volunteering for WFOT & WHO
- Advocacy Work for Causes
- Board Member for local/national/international groups



“LEADERSHIP REQUIRES
A MIXTURE OF BOTH
SKILL AND DESIRE”
(BARNES, 2011)


MANAGERS VS SUPERVISORS VS MENTORS

- **Managers:** Plan, Organize, Direct, & Control
- **Supervisors:** Control and Direction of Work for Improved performance & Better outcomes
- **Mentors:** Facilitate Career Development & Provide Psychosocial Support

SUPERVISION IS DEFINED AS THE CONTROL AND DIRECTION OF WORK OF ONE OR MORE EMPLOYEES IN A MANNER THAT PROMOTES IMPROVED PERFORMANCE AND A HIGHER-QUALITY OUTCOME.

Management	• Monitoring and evaluating work of direct reports
Education	• Development and evaluation of staff competencies
Support	• Professional development

(Koverman & Braveman, 2016)



CHARACTERISTICS OF EFFECTIVE SUPERVISORS

- Solid foundation of technical knowledge
- Desire to achieve at high levels
- High expectations of achievement
- High levels of self-confidence
- Ability to instill a sense of values in other
- Ability to communicate effectively

(Braveman, 2016)

**SUPERVISORS ARE NOT MENTORS.
SUPERVISORS PERFORM SOME OF THE SAME FUNCTIONS, BUT THEY ARE NOT MENTORS.**

(Foss, 2011)

MANAGERS CAN
RECOGNIZE
THE PROFESSIONAL
DEVELOPMENT NEEDS
OF THEIR SUPERVISEES
AND ASSIST THEM IN
IDENTIFYING A MENTOR
(FOSS, 2011)

TYPES OF MENTORSHIP

- Formal mentoring
- Informal mentoring
- Peer to peer mentoring
- Group mentoring
- E-mentoring

Peer Mentor: Bonnie Riley, OTD, OTR/L
Candidate for Chairperson, Children & Youth
Special Interest Section (CYSIS)

DEVELOP A
MENTORING CULTURE

- Employee retention
- Improved morale
- Organizational commitment
- Transference of
organizational knowledge
- Accelerated professional
and leadership
development



TEAM-
MENTORSHIP IS
THE NEW
STANDARD


- Mentee gains a broader perspective
- Mentor gets a more manageable workload
- Both parties gain a safety net for unforeseen circumstances

(Chopra, Vaughn & Saint, 2019)

"MENTORS ARE CRITICAL FOR CONTINUING AND ACCELERATING THE IMPLEMENTATION OF EBP WITHIN AN ORGANIZATION."

"NOT ONLY DUE CLINICAL SCHOLARS AND INTERPROFESSIONAL EBP MENTORS NEED MENTORING, BUT MEMBERS OF THE ENTIRE TEAM BENEFIT FROM ONGOING MENTORING"

(MOYERS & FINCH-GUTHRIE, 2016, P.42)



Informal Mentor: Rebekah Pope Kase, PT

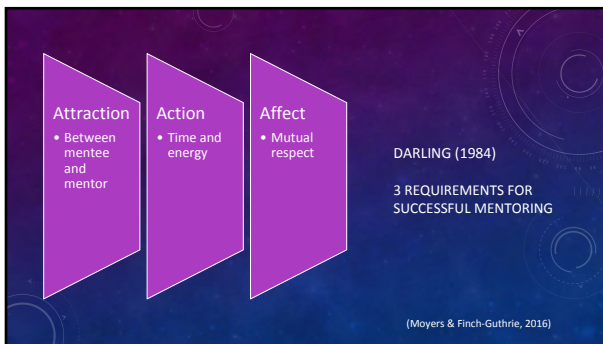
CLUTTERBUCK & MEGGINSON SAID:

"MENTORS HELP MENTEES STEP 'OUTSIDE THE BOX OF HIS OR HER JOB AND PERSONAL CIRCUMSTANCE, SO THEY CAN LOOK IN AT IT TOGETHER. IT IS LIKE STANDING IN FRONT OF A MIRROR WITH SOMEONE ELSE, WHO CAN HELP YOU SEE THINGS ABOUT YOU THAT HAVE BECOME TOO FAMILIAR FOR YOU TO NOTICE'"

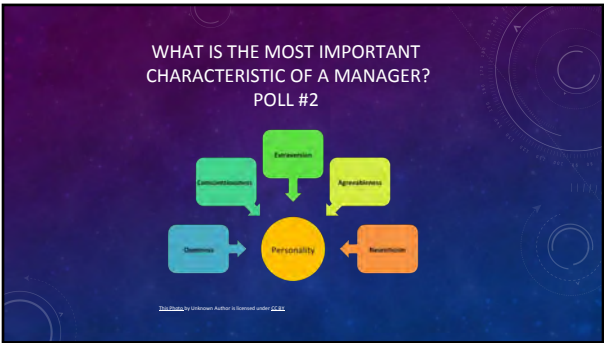
(AS CITED IN BOLTON, 2014, P.59)

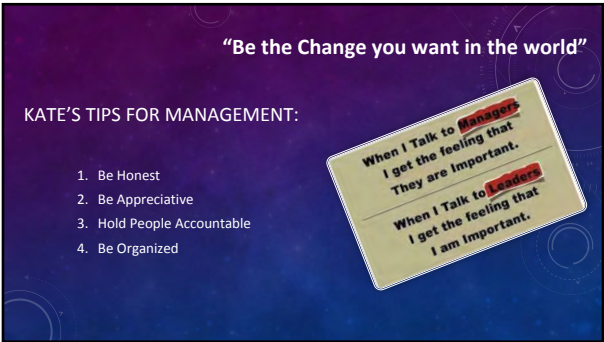














"HIGH MORALE, EMPLOYEE SATISFACTION, AND THE ACHIEVEMENT OF HIGH LEVELS OF MOTIVATION ARE POSSIBLE DURING CHALLENGING TIMES IF EMPLOYEES VIEW THEIR TEAM'S WORK AS ULTIMATELY CONTRIBUTING TO MAKING OTHERS' LIVES MORE FULFILLING"

(PHIPPS, 2011)

BARNES' THREE ELEMENTS OF LEADERSHIP: PASSION, ENERGY AND A FOCUS ON QUALITY



Passion:
Dr. Patty Meyers, OTD,
OTR/L




Energy:
Dr. Karen Jacobs, EdD,
OTR/L, CPE, FAOTA




Focus on Quality:
Dr. Stacey Reynolds, Ph.D.,
OTR/L, FAOTA

LEADERSHIP TIPS BY BARNES



Push yourself more than you stretch others.



(Barnes, 2011)

**“ATTENTION TO QUALITY
OUTCOMES IS THE
CAPSTONE OF EFFECTIVE
LEADERSHIP AND ENSURES
SUCCESS FOR THE
ORGANIZATION AND FOR
EMPLOYEES AS
INDIVIDUALS”**

(BARNES, 2011)

Tip # 2: Be appreciative – Employee Retention

**“PRAISE FROM
MANAGERS IS THE #1
PERFORMANCE
MOTIVATOR, MORE
THAN FINANCIAL
INCENTIVES”**

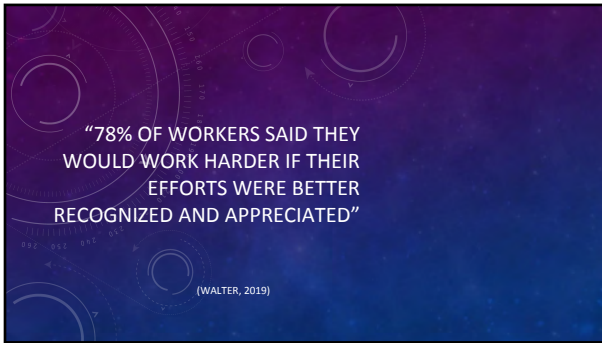
(WALTER, 2019)

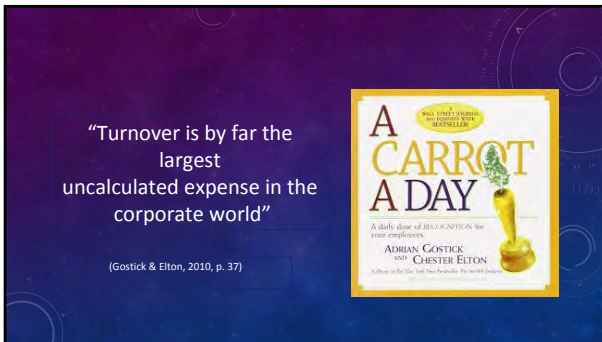


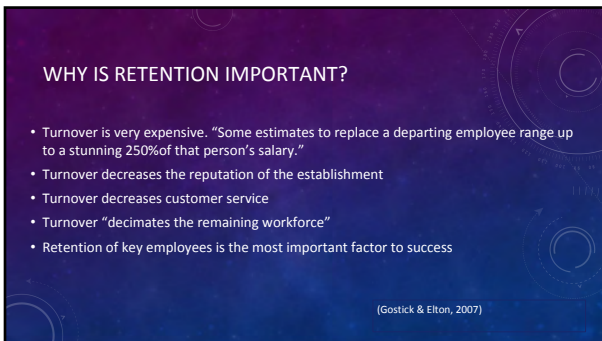
**“People don’t leave for money.
They often leave supervisors”**

(Gostick & Elton, 2010, p. 25)









REWARDING EMPLOYEES IS KEY TO RETENTION

Rewarding employees pays off:

- As a strategic force (you reward behaviors you want repeated)
- As a superior communication methodology (no one tunes out when a peer is being recognized)
- By creating an emotional bond between employee and manager
- When you get recognized for your work, you feel more committed to stay- stronger sense of purpose
- Positively impacts bottom line- people who feel appreciated do better work

(Gostick & Elton, 2010, p. xxii)

RETENTION FACTS

- 88% of employees say their biggest beef with their organization is not enough acknowledgement of their work
- 9 out of 10 employees feel unappreciated
- 80% of employees believe they get no respect at work

(Gostick & Elton, 2010, p. 6)

WITH INCREASED RECOGNITION....

- Turnover decreases
- Sense of competence increases
- Facilitates movement toward achieving set goals
- Educates employees on company values
- Increased employee morale and motivation



**EMPLOYEES WHO
ARE RECOGNIZED
REGULARLY:**

- Increase their individual productivity
- Increase engagement among their colleagues
- Are more likely to stay with their organization
- Receive higher loyalty and satisfaction scores from customers
- Have better safety records and fewer accidents on the job

(Gostick & Elton, 2010, p. 11)

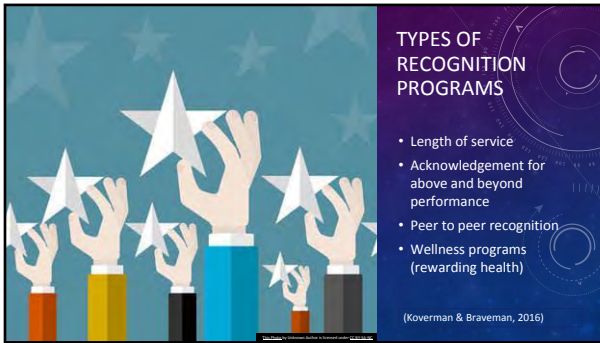
**"If I make a mistake,
I am recognized 100% of the time;
when I do something great,
I'm not recognized
99% of the time."**

Gostick & Elton, 2007

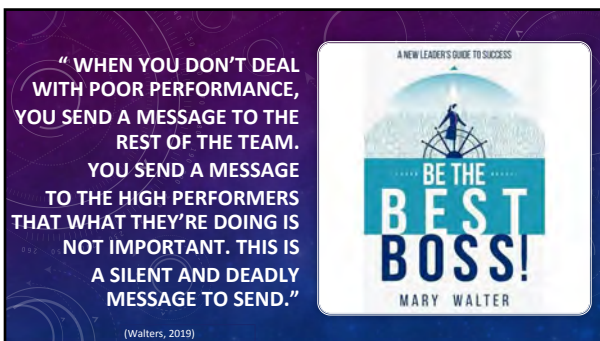
HOW FULL IS YOUR BUCKET? (RATH & CLIFTON)

**"Praise must outweigh criticism by a five to one margin
to achieve a high-performance culture"**

(As cited in Gostick & Elton, 2010, p. 133)





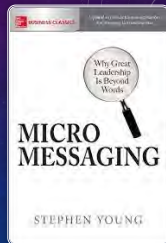


" When you have someone who is failing, look at it as a rescue mission. They are either in the wrong job, or they need to perform better. They didn't join to fail, so consider how you can rescue by either training and developing or help him to move to a new role where they are better suited to succeed"

(Walters, 2019)

TIPS FOR ACCOUNTABILITY

- When something happens, document and respond
- Meet with your staff regularly
- Performance reviews should never be a surprise & use objective data
- Give our peer appraisal forms to multiple departments
- Be aware of micro messaging & unconscious bias
- Be organized & accountable yourself



15 MINUTE MEETINGS (OR 5 MINUTES)

- The weekly 15 minute meeting is sometimes used between the head administrator and the department heads. This is something you can ask for from your administrator, if you feel you do not have enough 1:1 time.
- You can also have a weekly 5 minute meeting with each of your direct reports to keep the lines of communication open.
- Word of caution: if you meet with one employee, you need to meet with all employees

SKIP LEVEL MEETINGS

- Skip level meetings are a great way to ensure that your staff feels their voices are heard.
- Staff feel important and appreciated when they are permitted time with the administrator.
- Provides direct communication for problems in the building that may be out of your department.
- Important to have skip level meetings by department and not place more than one department together to save time

Tip# 4 Be Organized

TEAM MEETINGS

- Set an Agenda (Ask for agenda items beforehand)
- Start with Old Business & review previous items not resolved
- Always save time for new business at the end of agenda
- Photocopy and provide agendas at meeting
- Be on time
- Be prepared
- Take meeting notes, post & send to administrator



USE THE PARKING LOT



TEAM MEETINGS

- Employees must be paid during staff meetings
- Meetings should be no more than 2 hours
- Meetings should be held in a physical space that allows for all parties to sit at the table facing each other
- Do not permit tardiness from employees
- Do not permit employees to talk over one another, interrupt or raise their voice
- Keep the team on track. Don't permit long derailments

RELINQUISHING POWER

Do you have a back up manager(s)?



MOTIVATING EMPLOYEES

- Job Design is a way to provide Intrinsic rewards

Job Simplification

Job Enlargement

Job Rotation

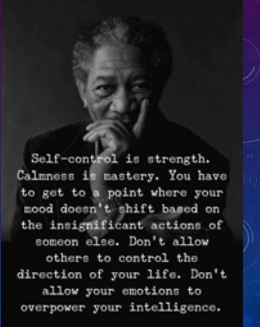
Job Enrichment

(Koverman & Bravemen, 2016)

Handout for the Therapro webinar **Supervision & Management for the Occupational Therapist** presented by Kate Barlow, OTD, MS, OTR/L - December 1, 2020

Management requires emotional intelligence and training.

As OTs, we need to further educate ourselves on how to be an effective manager when we are promoted to this role. We cannot rely on the training we received to become an OT, as management requires an additional skill set.



Self-control is strength. Calmness is mastery. You have to get to a point where your mood doesn't shift based on the insignificant actions of someone else. Don't allow others to control the direction of your life. Don't allow your emotions to overpower your intelligence.



QUESTIONS?
THANK YOU,
KATE

[KATE.BARLOW@AIC.EDU](mailto:kate.barlow@aic.edu)
https://courses.aic.edu/otd_periwebinars

REFERENCES

- Araibi, L. (2019). Monitoring and motivating others. In K. Jacobs & G. McCormack (Eds.), *The occupational therapy manager* (6th ed., 357-367). AOTA Press.
- Barnes, L. (2011). Passion= energy= quality: Leading others to love their work. In K. Jacobs & G. McCormack, (Eds.), *The Occupational Therapy Manager* (3rd ed., 283-293). AOTA Press.
- Braveman, B. (2016). *Leading and managing occupational therapy services: An evidenced based approach* (2nd ed.). FA Davis.
- Chopra, V., Vaughn, V., & Saint, S. (2019). *The mentoring guide: Helping mentors and mentees succeed*. Michigan Publishing.
- Corporate Leadership Council. (2003). *Hallmarks of leadership success: Strategies for improving leadership quality and executive readiness*. Corporate Executive Board.
- Ellis, C. (2005). *Management skills for new managers*. American Management Association.
- Gebelein, S., Stevens, L., Skube, C., Lee, D., Davis, B., & Hellervik, L. (2001). *Successful manager's handbook*. Personnel Decisions International.
- Gostick, A. & Elton, C. (2007). *The carrot principle*. The Free Press.
- Gostick, A. & Elton, C. (2010). *The invisible employee*, 2nd ed. John Wiley & Sons, Inc.
- Harrington-Mackin, D. (1994). *The Team building tool kit*. American Management Association.
- Koverman, B. & Braveman, B. (2016). Roles and functions of supervisors. In B. Braveman (Ed.), *Leading and managing occupational therapy services* (2nd ed., 185-214). F.A. Davis Company.
- Lussier, R. & Achua, C. (2001). *Leadership: Theory, application and skill development*. South-Western College Publishing.
- Megginson, D., & Clutterbuck, D. (2005). *Techniques for coaching and mentoring*. Elsevier.
- Nahria, N., Groysberg, B., & Lee, L. (2008). Employee motivation: A powerful new model. *Harvard Business Review*, 86, 78-84.
- Phipps, S. (2011). Motivating employees. In K. Jacobs & G. McCormack (Eds.), *The occupational therapy manager* (5th ed., 227-236). AOTA Press.
- Walter, M. (2019). *Be the best boss*. Mary Walter Leadership, Inc.
