The Development of Leaders: Suggested Modules for Education

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Abstract

The development of leaders is critical for the education of all professionals and, particularly, those in the field of occupational therapy. Current accreditation standards offer a limited perspective on leadership, and educators should consider a more holistic viewpoint to leadership development, especially as many programs are moving to the doctoral level. The adult learning theory of andragogy in conjunction with social learning theory, experiential learning theory, and leadership theories can help guide educators' creation of integrative learning opportunities. This paper proposes a framework for leadership education that promotes building leadership capacity through leadership skill, identity, and mindset formation. Suggested evidence-based learning strategies and assessment methods complement the leadership development framework.

Keywords

leadership development, andragogy, occupational therapy education

Cover Page Footnote

Credentials Display

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DOI: 10.15453/2168-6408.1941

Leadership is an important topic in entry-level occupational therapy education, particularly for entery-level doctoral students. Future occupational therapists require advanced skills in leadership, so they are best prepared to meet the challenges of health care and society (Brown et al., 2015). More importantly, leadership is considered a path to addressing critical societal needs and inequities (Brown, 2006). Many occupational therapy leaders also emphasize the importance of leadership education for innovation and sustainability of the profession (Heard, 2014; Hinojosa, 2007; Moyers, 2007a, 2007b; Stoffel, 2013). Occupational therapy educators should create intentional learning opportunities that foster future therapists who are reflective and adaptable to meet complex leadership challenges. This paper intends to provide concrete strategies for educators when providing holistic and evidence-based leadership development in occupational therapy curricula.

Leadership and Accreditation Standards

Curricula in occupational therapy need to adhere to accreditation standards. In the 2018 *Accreditation Council for Occupational Therapy Education (ACOTE®) Standards*, leadership is explicitly addressed in the B.5.0. Context of Service Delivery, Leadership, and Management of Occupational Therapy Services standards and implicitly in the B.7.0. Professional Ethics, Values, and Responsibilities standards. There are, however, inherent limitations in how these standards are currently written and organized. The standards that distinctly mention leadership are embedded in a section that clearly emphasizes management skills. This perspective limits the full range of skills and contexts in which occupational therapists can employ leadership behaviors. And without an explicit link to leadership in the B.7.0. standards (Professional Ethics, Values, and Responsibilities), students and educators may not make important connections between these behaviors and those of a leader. Perhaps there should be separate standards for leadership, or at least standards that distinguish leadership from management, in the doctoral standards.

Building Leadership Capacity and Identity

Occupational therapy education needs to focus on building leadership capacity, developing a leadership identity, and instilling values for lifelong learning through professional development (Heard, 2014; Scott & Webber, 2008; Stoffel, 2014). Students armed with this perspective will, in turn, be therapists who can take this identity and shape leadership behaviors to meet diverse contexts and situations. When considering the volatile health care market, occupational therapists must be ready to use these leadership behaviors to pivot the direction of the profession and not get left behind when reimbursement is frequently changing, and models of care are continually evolving. Indoctrination to the importance of a leadership perspective is essential during the formative years of education so that students enter practice knowing that leadership is not just related to their specific position.

Occupational therapy educators should have a strong understanding of how to develop leadership identity and capacity to be effective in reaching this goal. One challenge many educators face is meeting the needs of students with diverse backgrounds and experiences (Hinojosa, 2007). Until now, there has been a dearth of leaders from diverse backgrounds in our professional organization. As the applicant pool becomes more diverse, the inclusion of leadership content in curricula can help to promote more diverse leadership in the profession. Data from the *Academic Programs Annual Data Report* (AOTA, 2020) show that 80% of faculty are white; therefore, occupational therapy programs need to encourage access to diverse role models and leadership development opportunities. Whenever possible, it would be helpful to provide interaction opportunities for students with therapists and educators from diverse backgrounds who are engaging in leadership activities.

Teaching Leadership to Adult Learners

Consistent with occupational therapy practice, instructors in occupational therapy education can consider using a model to help guide their approach more holistically. Traditionally, many educators use pedagogy as their theoretical approach to teaching. Knowles defines pedagogy as "the art and science of teaching children" (1973, p. 42, as cited in Merriam & Bierema, 2014). Pedagogy can be an appropriate method for instructing technical and prescriptive aspects of occupational therapy, such as anatomy or safe transfer techniques. However, for some concepts, this approach can fail to capture the unique perspectives and experiences adult learners bring to their learning. Recent trends in higher education point to a more personalized experience, and andragogy, the study of adult learning, provides a lens that considers the unique experiences and motivations adult learners bring to their educational context (Jeanes, 2021; Knowles et al., 2020; McCauley et al., 2017). In addition, andragogy emphasizes the importance of contextualizing learning directly to the subject matter, encouraging active exploration and application opportunities situated in real-life scenarios (Brown, 2006; Scott & Webber, 2008). Figure 1 outlines the principles of andragogy. Continuing the analogy of occupational therapy practice to education, educators should consider a frame of reference to move theory to action-oriented processes. Educators need to operationalize andragogical assumptions by creating an active and reflective learning environment where the educator serves as a facilitator for greater student self-directed learning approaches (Henschke, 2011). Thus, additional perspectives are needed to relate leadership development to occupational therapy practice in the setting of the adult learners' needs.

Figure 1

Malcolm Knowles' Principles of Andragogy

1. Learners need to know	• Why, what, and how
2. Self-concept of the learner	• Autonomous • Self-directing
3. Prior experience of the learner	• Resource • Mental models
4. Readiness to learn	• Life-related • Developmental task
5. Orientation to learning	• Problem-centered • Contextual
6. Motivation to learn	• Intrinsic value • Personal payoff

Note. Adapted from "The Adult Learner: The Definitive Classic in Adult Education and Human Resource Development", by M.S. Knowles, E.F. Holton III, R.A. Swanson, and P.A. Robinson., 2020. Routledge, p. 6.

Educators must consider their position in the classroom as leaders, role models, and experienced therapists. American Occupational Therapy Association ([AOTA], 2009) identifies these as key attributes of faculty. Social learning theory lends support to this perspective by identifying the educator as someone who can provide reinforcement (direct and vicarious) of leadership through student observations of their behaviors and viewpoints (Charungkaittkul & Henschke, 2018; Clapp-Smith et al., 2019; Kim, 2020). In addition, this is best served when educators provide experiential learning opportunities where the instructor can model these behaviors and students can practice these skills, a core tenet of andragogy. This concept has been shown to be effective for leadership education in other health professions, such as medicine and nursing (Cathcart et al., 2010; Earis et al., 2016). Scott and Webber (2008) posit that experiential leadership learning without exposure to experts in this area can lead to narrow and uninformed viewpoints and lends evidence for this integrated approach. It is also important for occupational therapy educators to model leadership behaviors most consistent with the values of the occupational therapy profession. Authentic leadership, servant leadership, and transformational leadership are consistent themes in the occupational therapy literature, which is reflective of the core philosophical underpinnings of empowerment and service in the occupational therapy profession (Brown et al., 2014; Heard, 2014; Hitch et al., 2020; Stoffel, 2013; Stoffel, 2014; Sweetman, 2018). Scott and Webber (2008) again support the need to orient students in the belief system of their profession to maximize "visionary capacity" (p. 771). Using the intersection of social learning theory, leadership theory, and experiential learning theory through the overarching perspective of andragogy provides an innovative approach to occupational therapy education.

Proposed Educational Methods

In what ways can occupational therapy educators develop occupational therapy leadership behaviors in entry-level doctoral education? We propose a series of leadership education modules that are grounded in the principles of andragogy for second-year occupational therapy students. Second-year students are targeted for these models as they will have an occupational therapy identity with and understanding of the fundamental concepts of the profession, which they can use as context for leadership development. The outcomes of this module intend to build emerging leadership capacity in these students. Specific outcomes include:

- Recognizing the importance of leadership to the person and to the profession,
- Discussing the differences between leadership and management,
- Developing a leadership mindset,
- Personal empowerment,
- Promoting a diverse cadre of potential leaders of the profession.

Capacity building encourages the development of leadership skills, identity, and mindset (Clapp-Smith et al., 2019; Copolillo et al., 2010; Jeanes, 2021; Scott & Webber, 2008). Fink's (2013) taxonomy of significant learning serves as a guiding tool in the creation of the six learning objectives found in Table 1.

Table 1
Leadership Module Learning Objectives

Fink's Taxonomy of Significant Learning (Fink, 2013)	Learning Objectives
Foundational Knowledge	1. Students will be able to articulate professional leadership values and behaviors
Integration	2. Students will identify how past experiences connect with occupational therapy leadership practices
Caring	3. Students will be able to articulate personal leadership values
Human Dimension	4. Students will reflect on and identify areas for growth in their leadership skills and behaviors that are necessary for effective occupational therapy practice
Learning How to Learn	5. Students will identify strategies and resources for leadership development
Application	6. Students will create a leadership professional development plan

Each outcome builds on and relates to one another to foster significant learning and leadership development. The leadership module will guide students through various active learning activities in a way that balances training with experience (Dugan, 2011). Consistent with the Knowledge-to-Action (KTA) Framework or quality improvement feedback loop, this module offers a framework for students to engage in continuous self-assessment with strategies to plan, do, study, and act on needed leadership competencies (Irvin & White, 2004; Metzler & Metz, 2010). Using multiple modes of instruction and assessment is consistent with best practices in higher education and leadership development (Richmond et al., 2016; Scott & Webber, 2008). Below is a proposed template/course outline that provides an overview of core concepts along with recommended evidence-based teaching strategies rooted in andragogical principles for each module. See Figure 2 for an outline of the leadership modules.

Figure 2
Leadership Module Outline and Associated Learning Objectives

Module 1: Building Awareness - Leadership Identity	Module 2: Leadership Experiences in Context	Module 3: Future Directions
•**Learning Objective 1**: Students will be able to articulate professional leadership values and behaviors •**Learning Objective 2**: Students will identify how past experiences connect with occupational therapy leadership practices	•**Learning Objective 3**: Students will be able to articulate personal leadership values •**Learning Objective 4**: Students will reflect on and identify areas for growth in their leadership skills and behaviors that are necessary for effective occupational therapy practice	•**Learning Objective 5:** Students will identify strategies and resources for leadership development •**Learning Objective 6:** Students will create a leadership professional development plan

Leadership and the 21st Century Occupational Therapist

Module 1: Building Awareness: Leadership Identity (Learning Outcomes 1 & 2)

This first module will center on building awareness around professional aspects of occupational therapy leadership and leader self-identity. Situated in their second year, students can use their foundational knowledge in occupational therapy to advance toward a more complex understanding of leadership. Active learning strategies include students creating leadership theory presentations and

interviewing occupational therapy leaders to gain an appreciation for leadership in a variety of contexts through a social learning lens. McCauley et al. (2017) proposes that these types of interviews can create opportunities for practicing leadership skills, such as communication, and networking strategies that connect to experiential learning theory tenets and andragogic orientation of learning.

Self-reflection is a helpful strategy for fostering a leadership identity. Leadership identity leads to a greater commitment to leadership self-development and leadership capacity (Clapp-Smith et al., 2019; Dugan, 2011; Jeanes, 2021). Clapp-Smith et al. (2019) offer evidence-based exercises, including meaning-making around life experiences related to leadership behaviors and identifying leader strengths in oneself and others. These andragogical strategies help students frame leadership within familiar contexts and identify how behaviors and traits emerge in themselves. Moving this knowledge into action is the next step in leadership development.

Suggested Leadership Activities: Identifying Your Values

Activity 1: Using educational activities, such as the *Values Card Sort Activity* (Stoffel, 2019), can also help students identify their core values and reflect upon how these values impact their leadership perspectives. In this activity, students are given a list of key leadership attributes. This is not an exhaustive list, and students can brainstorm additional terms they feel are reflective of leadership concepts from their leadership textbooks or core occupational therapy documents. From this list, the students select the top three values that are most meaningful to them. Using group discussion, encourage students to reflect on how these values contribute to their personal leadership identity. Consider providing examples of challenges that occur in occupational therapy practice and have the students identify how these values may be enacted in a leader's decision-making and actions.

Activity 2: First, facilitate a discussion about values and leadership. Have students answer the following questions:
- Identify leaders from your past. Did those leaders provide positive or negative role models for you?
- Are there specific traits you would like to emulate as a leader? What are they?
- How have your past experiences with leaders shaped your concept of yourself as a potential leader?

Have the students complete the Values in Action (VIA) Survey of Character Strengths (Peterson & Seligman, 2004): https://www.authentichappiness.sas.upenn.edu/

Ask the students reflect on the results. Discuss whether the results are consistent with their perceptions of leadership and themselves.

Module 2: Leadership Experiences in Context (Learning Outcomes 3 & 4)

Experiential learning is a fundamental aspect of andragogical teaching and should be related directly to contexts in which the student is seeking knowledge, in this case, occupational therapy. This aspect of the module will focus on an in-person service-learning experience. Service learning has been found to develop leadership behaviors effectively in health-professions students (Foli et al., 2014; Komives et al., 2017). Programs can explore partnerships in the community to promote active service-learning and leadership-building experiences. After the session, students will be asked to reflect on their experience, noting perceptions of their leadership behaviors, the behaviors of the occupational therapist and faculty, and which leadership theories were influential during the session. Reflection is a powerful tool in helping students to understand their experiences and can be used to analyze growth and needed future action (Clapp-Smith et al., 2019; McCauley et al., 2017; Sweetman, 2018).

> **Suggested Leadership Activity: Experiential Service Learning in a Pro-Bono Clinic**
>
> The second-year students will work with and lead first-year students in a clinical skills module (taking blood pressure, pulse oximetry, and practicing basic interviewing skills) within a pro bono environment. All the students will be under the supervision and guidance of either a faculty member or licensed occupational therapist who can serve as a mentor or role model for leadership behaviors needed to lead a team (social learning).
>
> - How did it feel to be an instructor? Did you see yourself as a leader in this situation?
> - What aspects of this experience were comfortable to you? What aspects were not comfortable?
> - Think about your personal values of leadership from the previous activity, did they emerge during this experience? In what ways? Or did you find yourself having different values during the experience?
> - How did the role of "instructor" relate to your perception of leadership?

Module 3: Future Directions (Learning Outcomes 5 & 6)

From the self-reflection exercises completed in the first two modules, students will use this information to develop an action plan to bridge experiences and knowledge into future practice. Educators have a responsibility to ensure learning does not end in the classroom. Lifelong learning is supported by providing an abundance of leadership development resources and helping learners access these resources (Charungkaittkul & Henschke, 2018). Educators can empower students to identify areas for growth, create actionable steps to address learning needs, and set goals for future leadership opportunities through a leadership professional development plan. Creation of a portfolio that captures this leadership journey may help students see patterns of evolution (McCauley et al., 2017). It is important to create a leadership mindset, one that enables the student to understand that leadership is not static but rather a process where one configures skills and behaviors to meet challenges appropriately and effectively (Jeanes, 2021; Thacker, 2016).

> **Suggested Leadership Activity: Leadership Professional Development Plan**
>
> Part I: Personal Reflection
> Reflect on the first two leadership modules and answer the following questions:
> - How have they changed or reinforced your concept of leadership?
> - Do you see your potential as a leader? Define your interest in leadership.
> - Do you see areas that you need to develop to become an effective leader?
>
> Part II: Mission Statement
> Develop your own personal mission statement that will guide your actions and focus your leadership.
>
> Part III: Goals
> List three leadership-related goals and establish a timeline and enabling objectives needed to reach each of these goals. Include areas for involvement in leadership and volunteer opportunities if you lack in these areas. Enabling objectives may include leadership traits you would like to strengthen and related action steps.
>
> Part IV: Vision Board
> A vision board is a visual representation of your goals. Create a vision board with a medium of your choice using images, words, and ideas to convey your leadership goals and aspirations.

Conclusion

Ideally, students will embrace these active, experiential, and reflective activities designed to expand their leadership boundaries to the next level and prime them for continuous engagement in this process. These leadership modules almost exclusively require active engagement, and educators need to help students overcome their hesitancy with this active learning approach. The proposed activities can benefit student learning as it contextualizes their unique lived experiences with leadership and leadership development. While we suggest educators implement these modules in the second year so that students have a foundational understanding of the profession, it is up to faculty to identify what is best in their

curriculum. Educators may choose to use any or all of these modules in a way that best fits their needs. Programs can incorporate or modify content to better reflect curriculum design, threads, and departmental and organizational values.

The next step will be to assess the efficacy of these modules. Immediate outcomes, such as changes in student perceptions and behaviors, could be measured using tools like the *Student Leadership Practices Inventory* (Kouzes & Posner, 2018) or the *Student Leadership Competencies Inventory* (Rosch & Seemiller, 2018). Future outcomes, such as participation and engagement in leadership roles, practices, and positions, may be obtained through alumni surveys to track long-term results.

While many occupational therapy educators may not be versed in andragogy, as this is a relatively contemporary adult learning theory, this leadership module introduces how it can be used in didactic education. Ideally, educators need to be competent and confident in their leadership practices to model these behaviors effectively for students. Providing a learner-centered approach will foster more successful development of integral leadership skills. This encourages students to enter the field with a leadership identity and be empowered to have a far-reaching effect on the field of occupational therapy.

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