

Leading with Compassion: A Guide for Practitioners and Managers

Deborah Bolding, PhD, OTR/L, FAOTA

Kathryn Wise, OTD, MHSc, OTR/L

Western Regional Occupational Therapy Spring Symposium

March 2023



Scan me!

Introductions

How many of you have supervised an aide, fieldwork student, etc. (no formal title)?

How many of you have a work title that indicates you are a senior therapist, team lead, specialist, supervisor, manager, coordinator, director, etc.?

How many of you had formal training (degree, 4+ weeks of training, on-going mentoring or coaching) for those roles?

Objectives

1

Briefly review leadership theories

2

Identify compassionate leadership definitions and practices

3

Demonstrate skills in compassionate leadership through case discussions, role-play

4

Appraise your own skills for compassionate leadership; reflect on need for skills development

5

Share one model for developing compassionate workplaces

We are here because we want to support the development and success of ourselves and others



Self-compassion



Uphold

Uphold ethical standards & values; be **prepared to communicate & work effectively with persons, & act as administrators and leaders** (AOTA, p.2).

Learn

Learn effective communication that “supports a team approach to the promotion of health and wellness” (AOTA, p.33)

Provide

Provide “effective, competency-based legal and ethical **supervision of occupational therapy and non-occupational therapy personnel** (AOTA, p. 36).

ACOTE Standards and Leadership

(AOTA, 2018)



What is leadership? Who are the leaders?



Leadership Definition

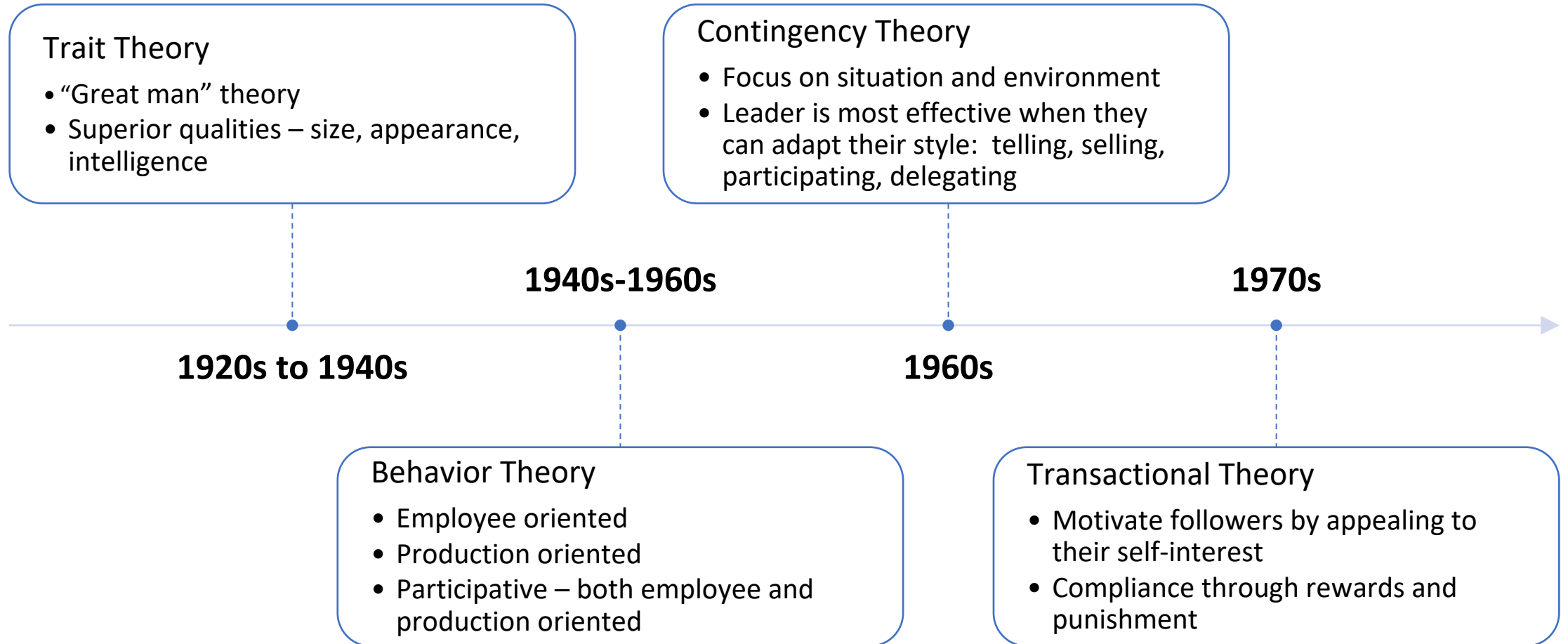
“Influencing the activities of an organized group in its efforts toward goal setting and goal achievement”

(Stogdill, as cited by Berrett & Wahlston, 2016)



Formal versus informal leaders

History





Transformational Leadership (1980s+)

- Leaders are charismatic, respected, trusted
- Leaders inspire/motivate followers to pursue outcomes based on sense of purpose and idealized mission
- Individualized attention for followers' growth and development
- Followers enthusiastic, motivated, stimulated, innovative

HOW TO WIN FRIENDS & INFLUENCE PEOPLE

The Only Book You Need to Lead You to Success

Dale Carnegie

UPDATED FOR THE NEXT GENERATION OF LEADERS

CLINICAL MIND LEADERSHIP DEVELOPMENT SERIES

SERVANT LEADERSHIP ROADMAP

MASTER THE 12 CORE COMPETENCIES OF MANAGEMENT SUCCESS WITH LEADERSHIP QUALITIES AND INTERPERSONAL SKILLS

CARA BRAMLETT, PAC

INTENTIONAL LEADERSHIP

THE BIG 8 CAPABILITIES SETTING LEADERS APART

Rose M. Patten

LEADERSHIP & CULTURE

WHY MANAGERS FAIL AND LEADERS PREVAIL

THE 5 ESSENTIAL LEADERSHIP SKILLS FOR CREATING A CULTURE OF BELONGING THAT DRIVES PERFORMANCE AND LOYALTY WITHIN YOUR ORGANIZATION

JOHN & KATIE McCANN

SPEAK FOR SUCCESS COLLECTION

HOW LEGENDARY LEADERS SPEAK

451 PROVEN COMMUNICATION STRATEGIES OF THE WORLD'S TOP LEADERS

PETER D. ANDREI

NEW YORK TIMES BESTSELLER

SIMON SINEK

Author of START WITH WHY

LEADERS EAT LAST

Why Some Teams Pull Together and Others Don't

Now with an expanded chapter on Millennials

NEW YORK TIMES BESTSELLING AUTHOR

CRAIG GROESCHEL

LEAD LIKE IT MATTERS

7 Leadership Principles for a Church That Lasts

DON CLIFTON

Father of Strengths Psychology and Inventor of CliftonStrengths®

STRENGTHS BASED LEADERSHIP

GREAT LEADERS, TEAMS, AND WHY PEOPLE FOLLOW

FROM GALLUP

The Coaching Habit

Say Less, Ask More & Change the Way You Lead Forever

Michael Bungay Stanier

Wall Street Journal Bestseller Over half a million copies sold

BE AN AWESOME BOSS!

THE FOUR C'S MODEL TO LEADERSHIP SUCCESS

TIM BURNINGHAM

#1 NEW YORK TIMES AND WALL STREET JOURNAL BESTSELLER

Brené Brown

PHD, LMSW

dare to lead

BRAVE WORK. TOUGH CONVERSATIONS. WHOLE HEARTS.

DARING GREATLY AND RISING STRONG AT WORK

SAY THANK YOU FOR EVERYTHING

THE SECRETS OF BEING A GREAT MANAGER

STRATEGIES AND TACTICS THAT GET RESULTS

JIM EDWARDS

PAUL A. WYATT

HOW TO LEAD FOR DARING NEW LEADERS

The No-Nonsense Guide to Develop Basic Leadership Skills

LEAD THE WAY IN FIVE MINUTES A DAY

Sparkling High Performance in Yourself and Your Team

JO ANNE PRESTON

FOREWORD BY FORBES.COM CONTRIBUTOR GINNY WHITE LAW

#1 WALL STREET JOURNAL BESTSELLER

FROM GALLUP

BASED ON OUR LARGEST GLOBAL STUDY OF THE FUTURE OF WORK

IT'S THE MANAGER

Moving From Boss to Coach

LEARN YOUR STRENGTHS Includes a code for the CliftonStrengths® assessment

JIM CLIFTON | JIM HARTER

New York Times Bestselling Author

JOHN C. MAXWELL

25th Anniversary Edition

THE 21 IRREFUTABLE LAWS OF LEADERSHIP

REVISED AND UPDATED

FOLLOW THEM and PEOPLE WILL FOLLOW YOU

When Women Lead

- What They Achieve
- Why They Succeed
- How We Can Learn from Them

Julia Boorstin

HOW TRULY GREAT LEADERS UNLEASH GREATNESS IN OTHERS

TRUST & INSPIRE

BESTSELLING AUTHOR OF THE SPEED OF TRUST

STEPHEN M. R. COVEY

with David Karpman, McKinley Covey, and Gary T. Judd

INTERNATIONAL BESTSELLER

JAMES M. KOUZES | BARRY Z. POSNER

THE LEADERSHIP CHALLENGE

SEVENTH EDITION

HOW TO MAKE EXTRAORDINARY THINGS HAPPEN IN ORGANIZATIONS

Leadership Challenge

Positive Leadership Styles

Transformational Leadership

Positive Leadership

Servant Leadership

Appreciative Inquiry

Authentic Leadership

Ethical Leadership

Compassionate Leadership



Compassionate + Leadership



Compassion

Recognizing feelings (suffering) of self
and others

Desire to help



Leadership

Qualities of a compassionate leader:
caring presence, caring courage,
caring candor, caring transparency

Compassionate Leadership Theory and Research

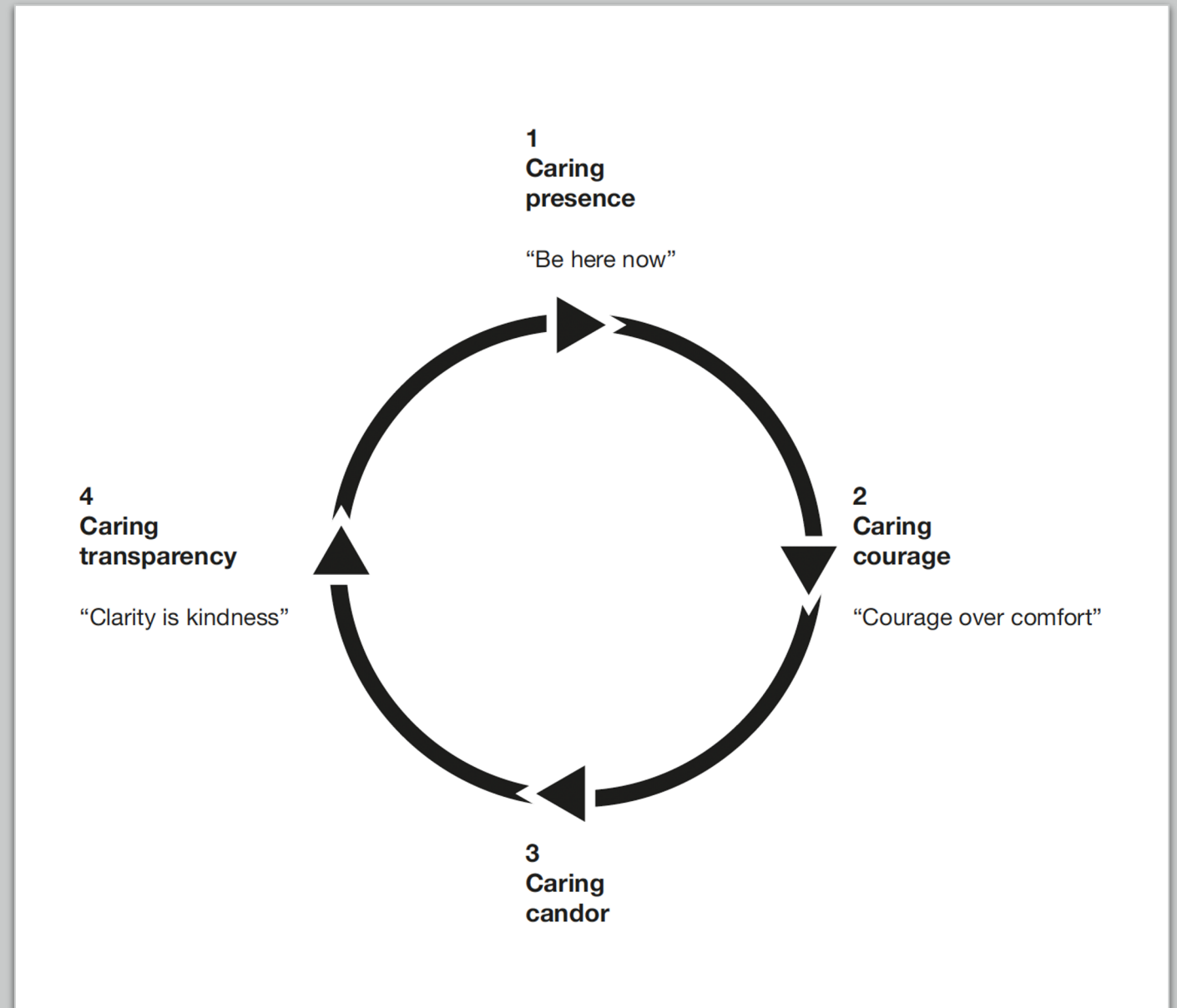
Is there one style? Is it top down or bottom up? How do you show compassion?

Research – mostly correlational – Positive leadership styles are correlated with employee engagement, increased retention, improved patient satisfaction and outcomes, etc.



Caring Presence

- Connect with empathy, “I feel with you”
- Step back – use compassion
- Ask what they need
- Coach person to find their own solution
- Sometimes non-action is the right approach



Case Example – Debby and her supervisor

The therapist (we'll call her Debby) had a patient who needed a bariatric wheelchair. The hospital had purchased chairs in the past, but they were either lost or in need of repair. Finding equipment was a chronic problem at the institution. Debby saw her supervisor in the hallway and began to berate her for not arranging a rental wheelchair so that the patient could be mobile. She accused the supervisor of not caring for the patients.

The supervisor remained calm and said, "I can see you are passionate about this problem."

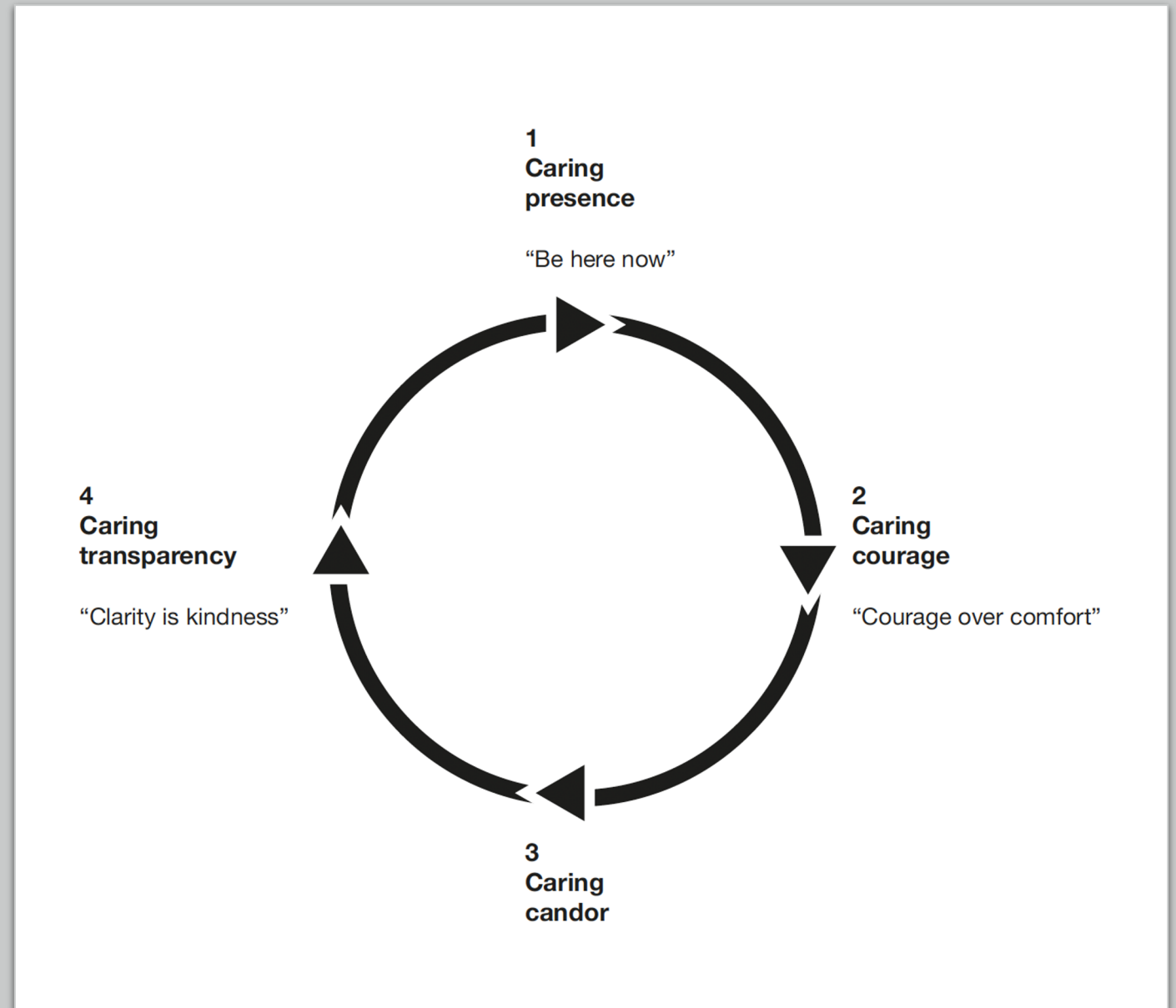
Role Play

You are the supervisor at a busy out-patient practice. The office is open from 7 am until 6 pm, to accommodate the schedules of their clients. One of the therapists was hired to work from 6:45 am until 3:15, but the therapist has been late 4 times in the last 2 weeks, leaving the clients scheduled for 7 am waiting.

1. *How will you demonstrate caring presence AND get more information about the situation?*
2. *What might be some consequences of inaction?*
3. *What other factors will you consider?*

Caring Courage

- Willingness to move out of our comfort zone, especially fear of hurting others
- Remember why you are a leader – desire to support development and success of others
- Confrontations are two points of view, and can be an opportunity
- Develop skills to managing confrontation with respect and skill



Case Example – Debby and her supervisor

The supervisor remained calm and said, “I can see you are passionate about this problem.”

She went on to share problems with budgeting (nursing had rental equipment in their budget, not rehabilitation). The two discussed ideas for ensuring that the patient’s needs were met as quickly as possible.

Role Play

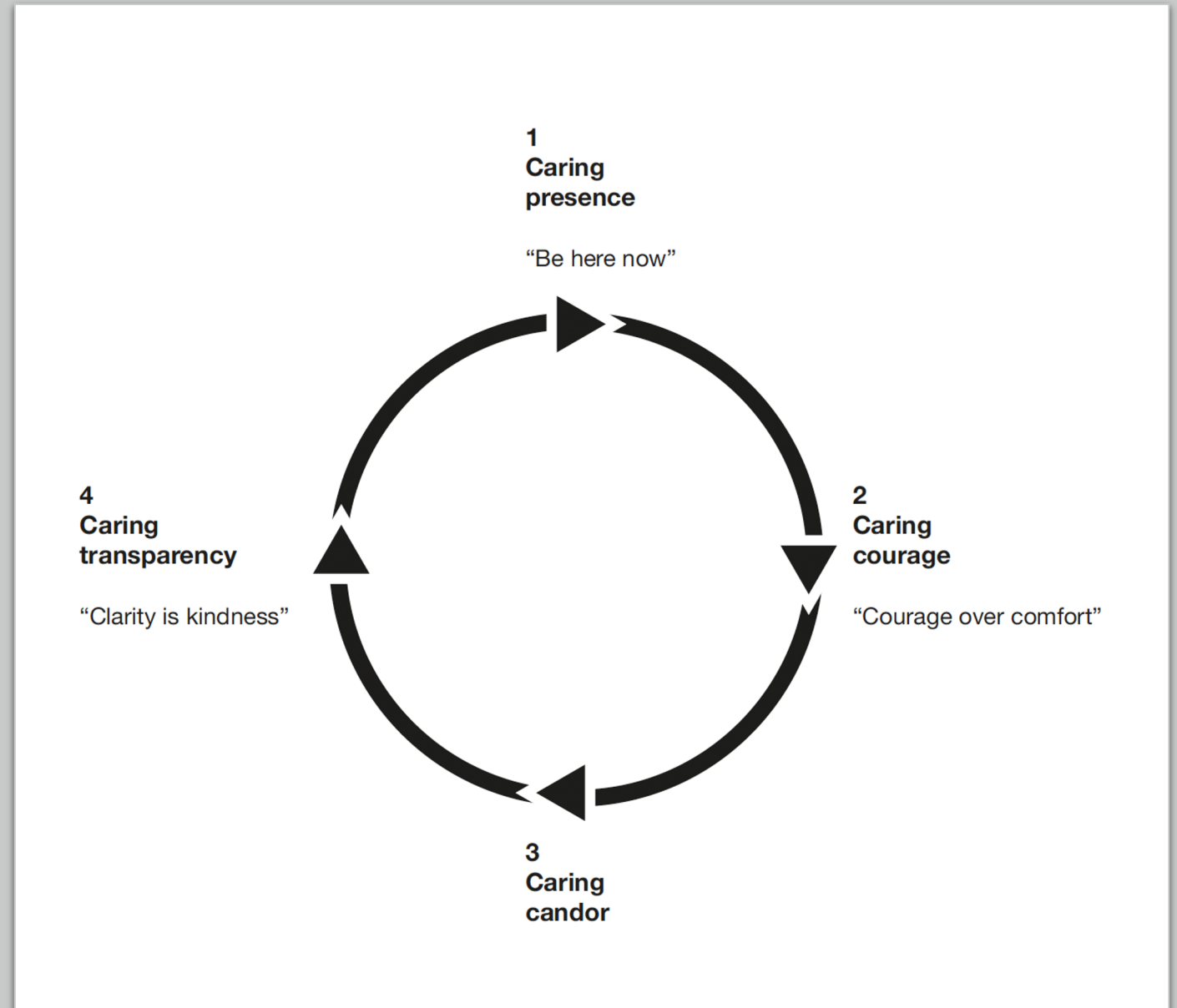
The therapist tells you that their partner's work hours have changed. The therapist is now responsible for dropping their child at daycare, and it is hard to adjust to the new schedule, plus the daycare doesn't open until 6:30, and sometimes traffic is slow between daycare and work. The therapist asks if it is possible to change their work schedule. The supervisor talks with other therapists, no one can or wants to change their current schedule.

The supervisor must consider the what is best for the clinic and the therapist. Decide what you think would be best.

- *Role play the discussion between the two. Are you demonstrating caring courage?*

Caring Candor

- Need balance between *care* and *candor*
- Kind and direct is faster
- Be open to other perspectives, but act with strength, confidence, knowing one's values and opportunities for improvement
- Is candor authoritarian?



Strategies for Cultivating Caring Candor

1	2	3	4	5	6
Be mindful of setting and context	Be timely and quick	Bottom line first	Be firm and decisive	Avoid the popularity game	Have zero tolerance for value breakers

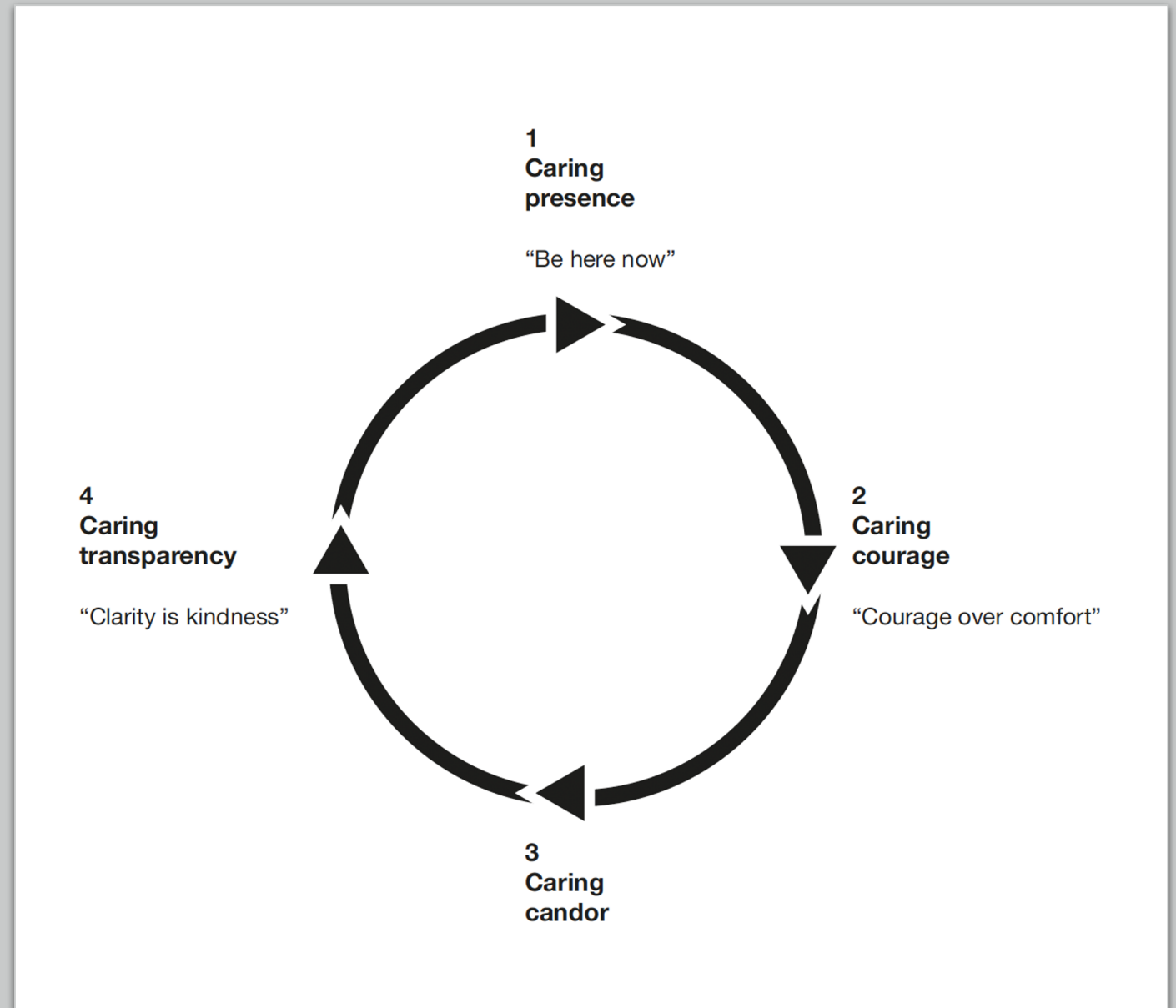
Role Play

You overheard a therapist telling her student, “I can’t believe you did something so stupid.” You recently heard this therapist had called nurses names like incompetent or lazy if the patients were not ready or if the nurse didn’t follow the occupational therapy plan for the patient.

How would a compassionate leader approach this problem? Try role playing the situation as colleagues, not as manager and employee.

Caring Transparency

- Being open and honest helps keep people from ruminating about events, decreases anxiety
- Treat people as adults
- Encourage dissent
- Demonstrate humility
- Be true to yourself



Role Play

Three people applied for the same clinical specialist position in your department. All were similar in terms of education and experience. All three led department in-services and projects in the past two years and had supervised fieldwork students.

One person was a member of both their state and national professional organizations, and was working on advanced certification in their specialty area. This person was chosen for the position.

Think about how you would tell the other two people that they did not get the job, then role play the discussion with a partner.

Other examples...

- “I know you’ve heard rumors about changes to our health benefits”
- “Yes, it’s true that Ziggy no longer works here. I respect their confidentiality and cannot discuss details with you.”
- “I should have been more forthcoming about the budget for new equipment. Here’s the current information...I’ll be more open in the future.”
- Staff were asked for feedback and to give ideas. Only a couple of ideas were chosen to be worked on. How would you respond to staff questions?

“I don’t have
time to deal
with this...”

How do you disengage, and
still have the employee feel
heard?

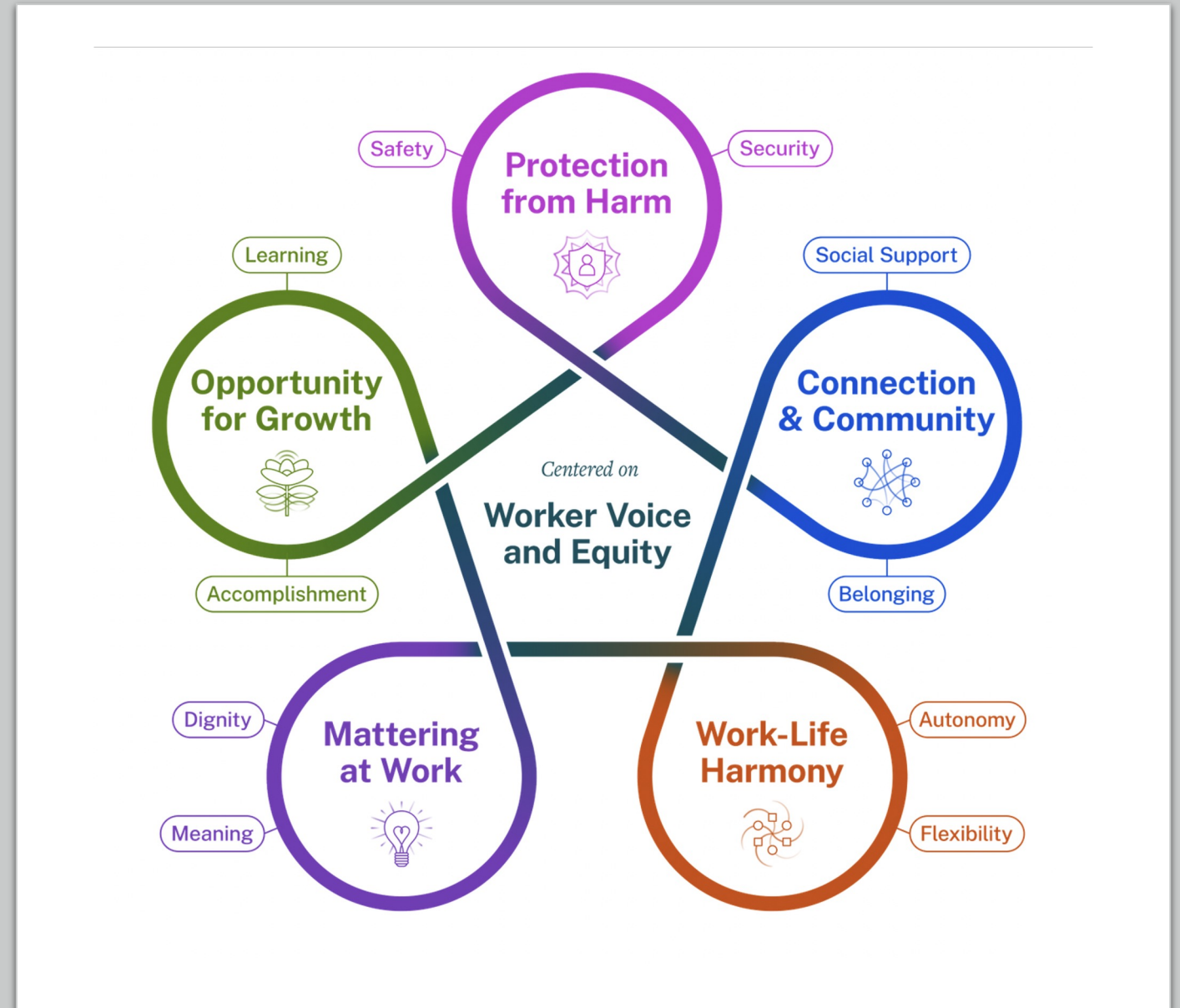
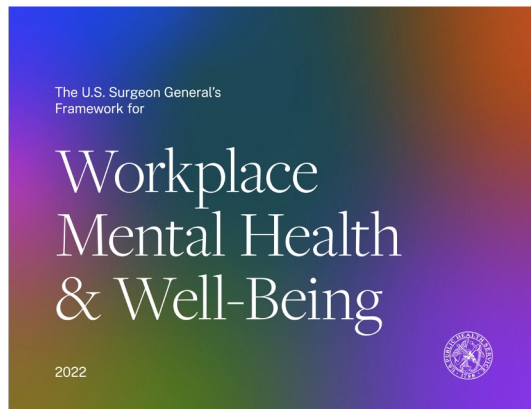




Framework for compassionate workplaces

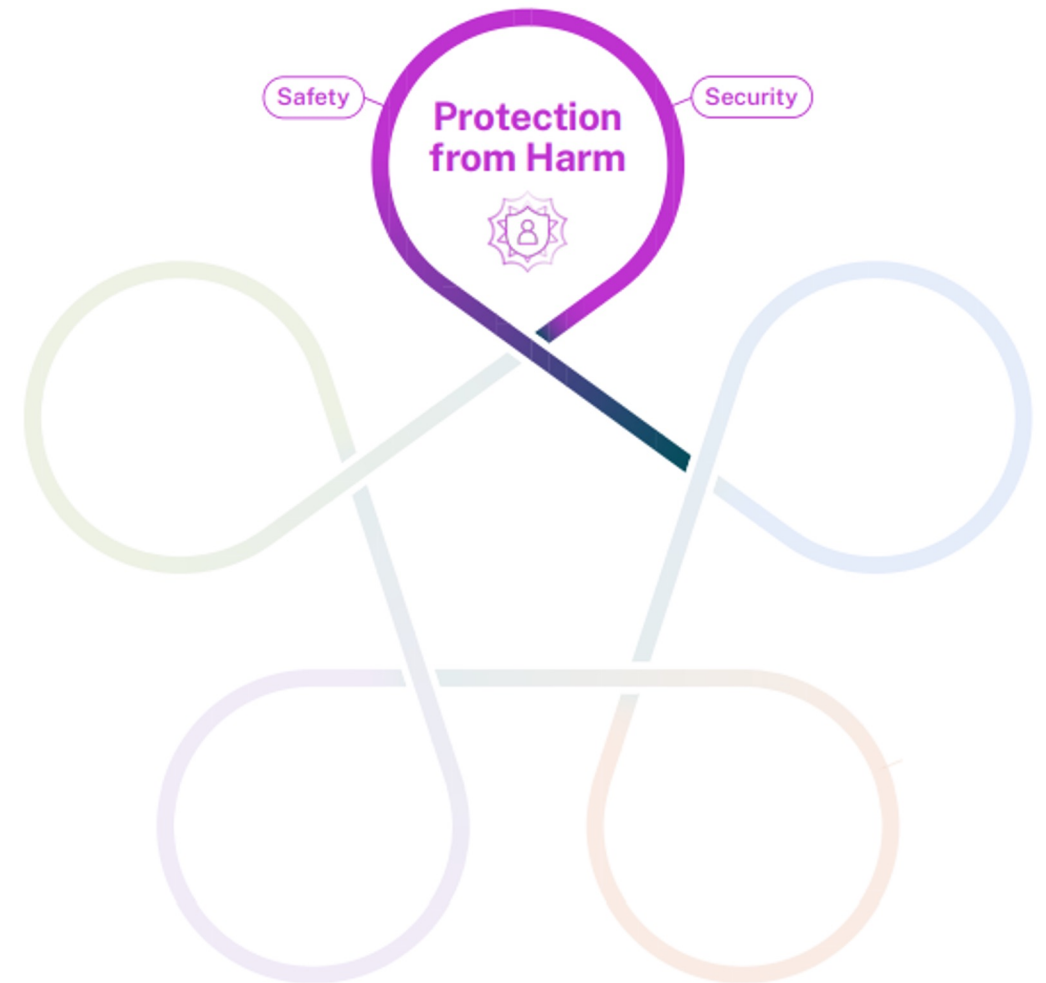


Department of Health and Human Services



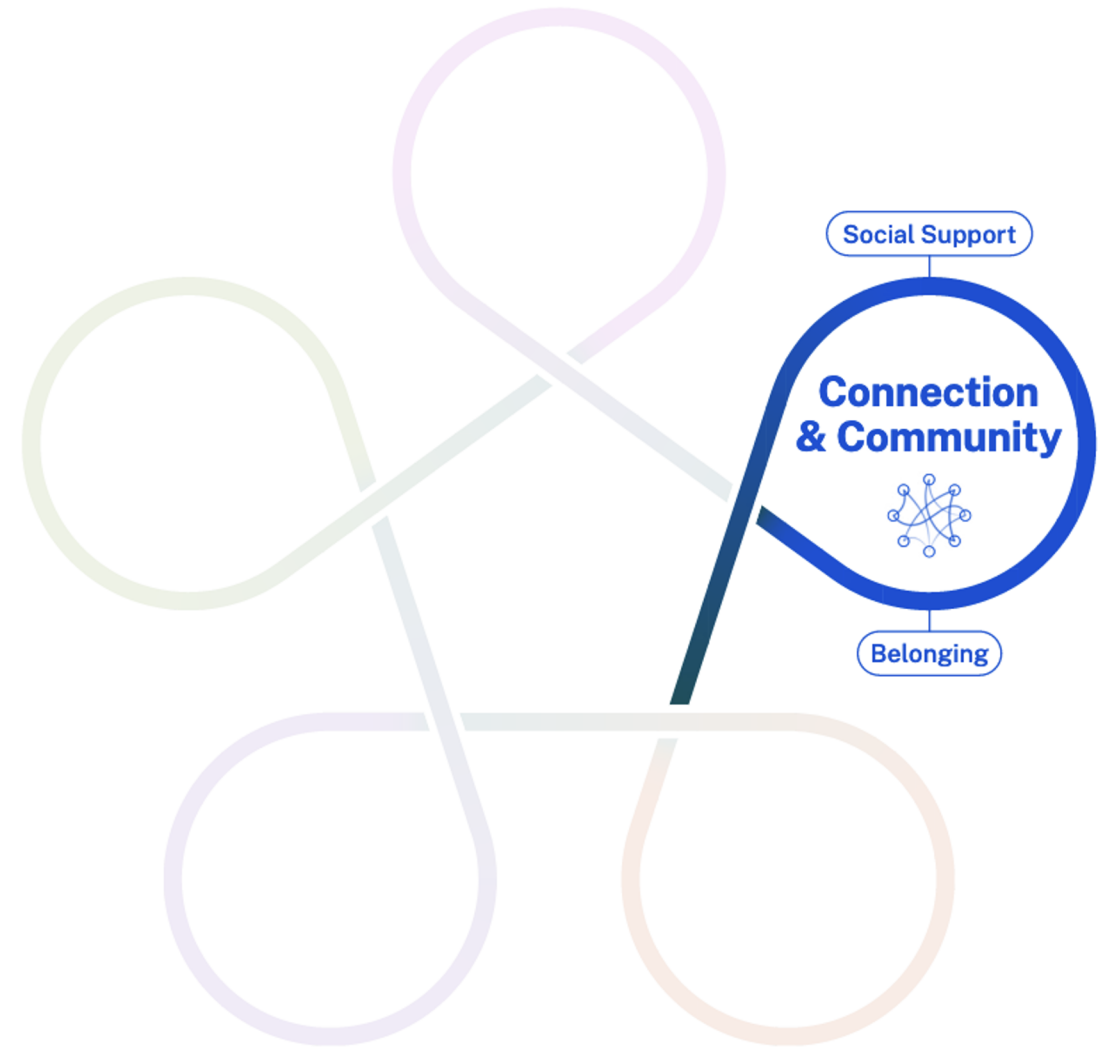
Protection from Harm

- Prioritize workplace and psychological safety – ensure not only physical safety but psychological as well
- Enable adequate rest – foster this within employee meetings etc.
- Normalize and support mental health – offer support and prevention services – training leaders on supports that can be offered
- Operationalize Diversity, Equity, Inclusion, and Accessibility (DEIA) norms, policies and programs – confront structural racism, workplace cultures, ableism, microaggressions, and implicit bias.



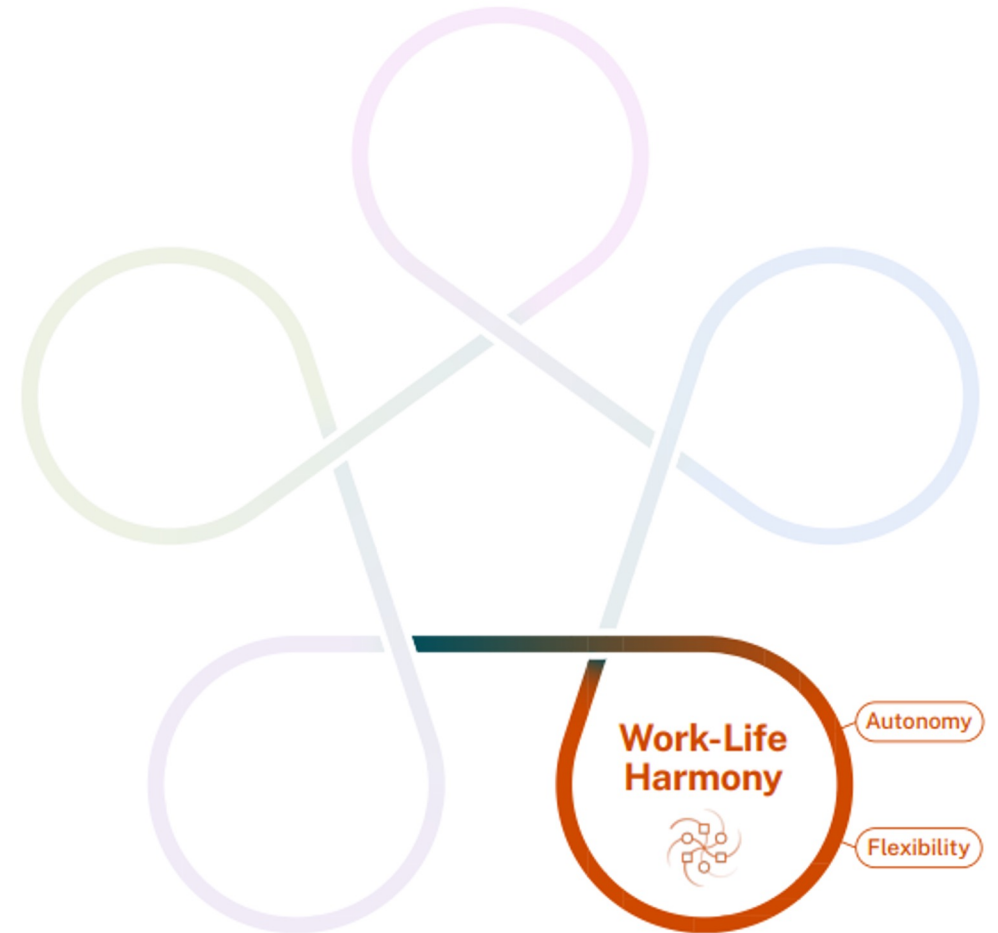
Connection & Community

- Create cultures of inclusion and belonging – welcoming, helping, reassuring, encouraging
- Cultivate trusted relationships – small, everyday interactions
- Foster collaboration and teamwork – communicate importance of teamwork, regular communication, foster non-work connections



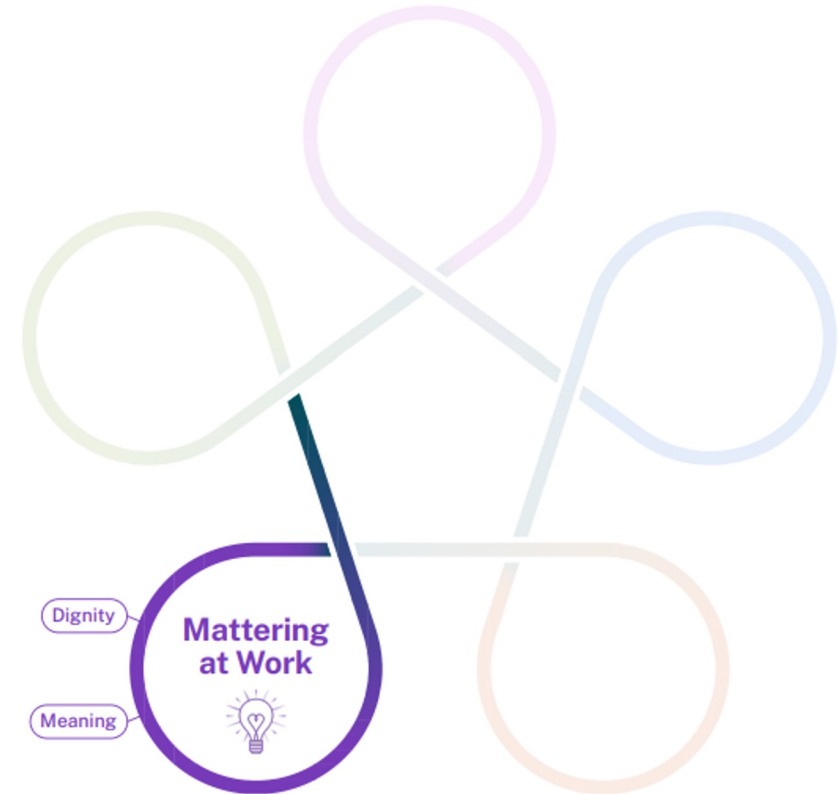
Work-Life Harmony

- Provide more autonomy over how work is done – need to see workers not only their work roles, but as whole people.
- Makes schedules as flexible and predictable as possible
- Increase access to paid leave – sick, family, parental, vacation
- Respect boundaries between work and non-work time – leaders must set, respect, and model clear boundaries between time on and off the job.



Mattering at Work

- Provide a living wage
- Engage workers in workplace decisions
- Build a culture of gratitude and recognition
- Connect individual work with organizational mission



Opportunity for Growth

- Offer quality training, education and mentoring
- Foster clear, equitable pathways for careers advancement
- Ensure relevant, reciprocal feedback



Time is Now.....

- Embrace the challenge of becoming a compassionate leader.
- How do you define being a compassionate leader?



Contact Information

Debby Bolding

deborah.bolding@sjsu.edu

Kathryn Wise

kwise@pacific.edu

References and Resources

- AOTA (2018). *ACOTE Standards and Interpretive Guidelines*. <https://acoteonline.org/accreditation-explained/standards/>
- Berrett, B. R., & Walston, S. L. (2016). Leadership theories and styles. In Walston and Association of University Programs in Health Administration Staff, *Organization Behavior and Theory in Healthcare: Leadership Perspectives and Management Applications*. Health Administration Press.
- Department of Health and Human Services (2022). The US Surgeon General's Framework for Workplace Mental Health and Well-being. <https://www.hhs.gov/sites/default/files/workplace-mental-health-well-being.pdf>
- Evans, D. (2022). So close to love: Compassionate leadership in healthcare. *British Journal of Healthcare Management*, 28(4). <https://doi.org/10.12968/bjhc.2021.0135>
- Hougaard, R., & Carter, J.. (2022). *Compassionate leadership: How to do hard things in a human way*. Harvard Business Review Press.
- Hougaard, R. Discussion about compassionate leadership <https://www.youtube.com/watch?v=tnZ34kjzXw>
- Weiss, L. (2018). Compassionate leadership. <https://www.youtube.com/watch?v=5yLj-IDICJA>
- West, M. (2019) Compassionate and inclusive leadership. <https://www.youtube.com/watch?v=RrPmMwg9X8s&t=282s>

Self Compassion Resources

- Kristin Neff: <https://self-compassion.org/>
- Kristin Neff: https://greatergood.berkeley.edu/article/item/the_five_myths_of_self_compassion
- Kelly McGonigal (kindness meditations) <http://kellymcgonigal.com/selfacceptance>
- Greater Good Science Center: <https://ggsc.berkeley.edu/> (there are many other centers like this one at universities around the country)



Thank you