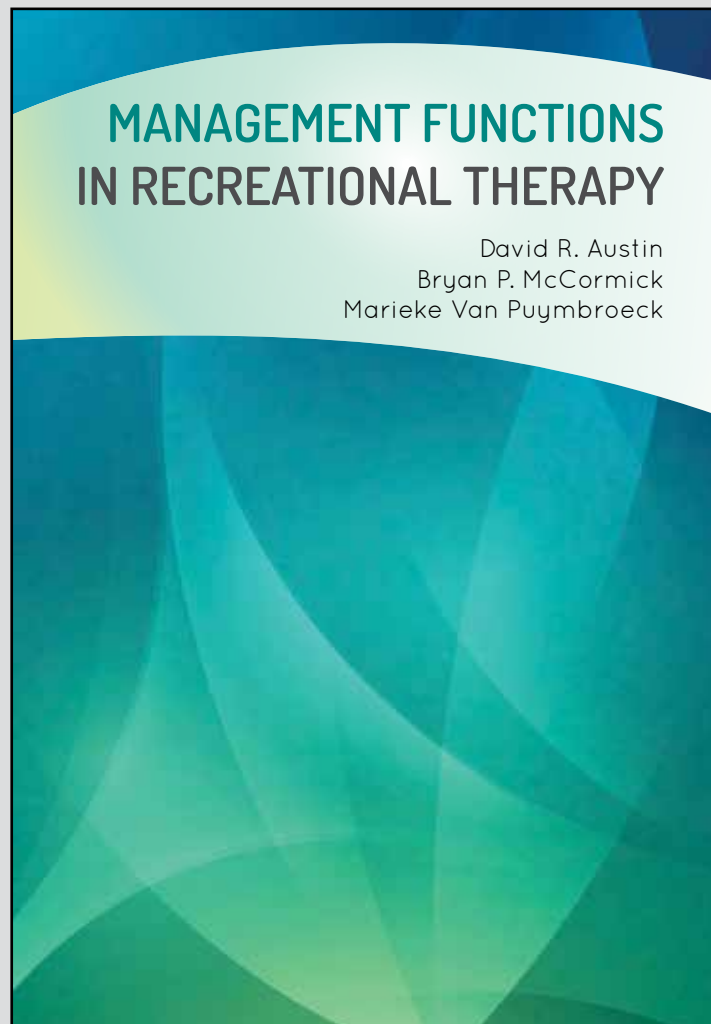


INSTRUCTOR'S GUIDE



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P U B L I S H I N G

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1

Introduction to Management

CHAPTER OVERVIEW

The purpose of the chapter is to introduce recreational therapy (RT) students to concepts of management and the need for them to gain understandings of management theories and principles.

Key Terms

management, leadership, manager, supervisor, first-line manager, legitimate power, authoritarian leadership (Theory X), participative leadership (Theory Y), Theory Z, bureaucratic leadership, situational leadership, laissez-faire leadership

Suggested Learning Activities

1. In class, ask students to write a definition of management. Then show a PowerPoint slide of the definitions of management provided by Grohar-Murry and Langan and by Dunn (that are found in the chapter) and have students discuss how their definitions agree or disagree with that of Grohar-Murry and Langan and that of Dunn. (For the PowerPoint slides, see the author-developed slides provided by Sagamore Publishing.)
2. Ask students to get together in small groups to discuss the contention of the authors of the text that management should be an integral part of the professional preparation of those in RT. Ask each group to have a recorder to report the group's discussion to the entire class.

Note within the group reports if the following aspects were mentioned: (a) RTs may have to apply management principles and skills even if they are the sole recreational therapist at a facility. For example, in long-term care there may be only one CTRS, so any management responsibilities fall on that person. (b) Most organizations do not provide adequate training for new supervisors, so when opportunities come for employees to advance into positions as managers, the management principles and skills gained during their studies will have provided a foundation for them to succeed in their new roles. (c) Even if they do not go into management, students will have an appreciation of management practices that are necessary to ensure a constructive environment in which to realize positive clinical outcomes for clients. (d) The National Council for Therapeutic Recreation Certification (NCTRC) standards, on which the national exam is based, call for knowledge of management principles and practices.

3. Review with students that the terms *supervisor* and *first-line manager* are synonymous. Then ask the students to list differences in the roles and functions between first-line managers and staff. First ask them what the first-line manager does, and as they answer, list the roles and functions on the board under the heading "First-Line Manager." Then have the students indicate what roles and functions staff take, and place their answers on the board under the heading of "Staff."

Following the recording of the students' responses, show the PowerPoint slide of Table 1.2, Differences Between Staff and First-Line Managers. Review the slide with the students and discuss with the students if their responses concurred with those on the slide. (The PowerPoint slide of Table 1.2 is available to you from Sagamore Publishing as one of the PowerPoint slides of all tables and figures found in the text.)

4. Give a verbal pop quiz in class. Ask students to take out a sheet of paper to define the types of power that managers may possess. The types of power are listed in the text under Table 1.1. Following the verbal quiz, ask students to grade their own papers as you review the correct answers.

Using the PowerPoint slide of Table 1.1, go over each term, letting students grade their own papers. (The PowerPoint slide of Table 1.1 is available to you from Sagamore Publishing as one of the PowerPoint slides of all tables and figures in the text.)

Students are apt to ask if their definition is correct. Once you have gone over the terms and the students have self-graded their papers, ask them to write their names on the top of the sheet and to indicate from 1 to 7 how many terms they correctly defined.

Tell the students you will not record their scores but that you wish to get an indication of their comprehension of the types of power and that you may later test on terms that they had trouble understanding.

5. To create student interest in class, play the 53-second video *Management Essentials: Leadership vs Management* (type the title followed by the word *video* in your search engine box or go to <https://www.youtube.com/watch?v=o0gnNYPiHWk>). Then give a brief lecture in which you discuss information presented in the chapter on the differences between management and leadership and the relationship between them.
6. In class, go over the material in the chapter on leadership styles that managers may adopt. As you do, remind students that you are providing only a brief introduction to the leadership styles that will be covered in more depth in Chapter 8 on influencing.

Author-constructed PowerPoint slides listing the types of leadership can be used to enhance the mini-lecture. The introductory slide is titled "Leadership Styles" and simply lists the titles of the leadership styles (i.e., authoritarian, participative, Theory Z, bureaucratic, situational, and laissez-faire). Then slides follow that cover each of the leadership styles. Should you have time following your lecture, ask the students which leadership style they prefer.

2 Recreational Therapy and Management

CHAPTER OVERVIEW

This chapter looks at levels of management and how recreational therapists fit into and function within these levels. Human relations skills, conceptual skills, and technical skills are discussed as they relate to different levels of management, including first-line management. Clinical supervision and how it relates to first-line management is discussed. The chapter concludes with a discussion of how therapists' skills transfer to management.

Key Terms

levels of management, first-line managers, supervisors, human relations skills, conceptual skills, technical skills, clinical skills, clinical supervision

Suggested Learning Activities

1. To set a context for the likely place of recreational therapists as supervisors or first-line managers (at least early in their careers), in class hold a brief discussion of the levels of employees using the PowerPoint slide showing Figure 2.1, Levels of Employees. (The PowerPoint slide of Figure 2.1 is available from Sagamore Publishing as one of the PowerPoint slides of all tables and figures found in the text.)
2. Introduce the concepts of human relations skills, conceptual skills, and technical skills using the PowerPoint slide titled "Skills Required of Managers" (an author-constructed PowerPoint slide). Then ask students to differentiate how managers at different levels apply each of these skills. You may use the slide of Figure 2.1 to have students indicate how managers at the various levels will use the types of skills.

An example of the use of skills is that technical skills—including clinical skills—are predominantly the responsibility of first-line managers, whereas the chief executive officer will largely use conceptual skills to provide vision for the organization and to develop strategic long-range plans.

Another example is the first-line manager must use human relations skills in the supervision of staff to obtain the objectives of the unit, in interactions with his or her higher manager, and in establishing and maintaining good working relationships with colleagues who supervise other units. In contrast, the executive officer will use human relations skills in interacting with other executives and senior managers.

3. In class, put up the slide containing the quote made in the text that "perhaps the most challenging part of the job of the supervisor (i.e., first-line manager) is being 'the person in the middle' between higher management and the employees he or she oversees." (See author-developed PowerPoint slide for quote.) Ask students to explain the statement.

Then using the author-developed PowerPoint slide titled "Activities Performed by First-Line Managers," extend the discussion by reviewing the list of activities carried out by first-line managers. Following reviewing the list of activities, see if students can add any other activities first-line managers might carry out (e.g., preparing budgets or operational plans or conducting performance appraisals and perhaps disciplining staff). The intent is to allow students to begin to grasp the roles and functions of those in first-line management positions.

At the end of class, have students turn in their papers to be graded.

4. Assign students to view the initial 4 minutes 48 seconds of the video *Clinical Supervision* outside of class. In this segment, clinical supervision is defined, its purposes are identified, and distinctions are made between clinical and administrative supervision. Instruct students to type *Recreation Therapy Videos* into their search engine box and then look for the Indiana University scholarworks.iu.edu videos, or they may go to <https://scholarworks.iu.edu/dspace/handle/2022/3378>. In either case, they should click on the title *Clinical Supervision* and the video will come up. (An alternative is to show the first 4 minutes 48 seconds of the *Clinical Supervision* video in class.)

After students view the video before class (or during class), give a quiz in class: (1) Define clinical supervision in one paragraph. (2) List two purposes of clinical supervision. (3) Differentiate between clinical supervision and organizational or administrative supervision.

For grading each other's papers, have students write their name on the top of the sheet and exchange papers once and then again. Go over the three questions, having students answer them. Ask students to use a 5-point grading system for each question so there are 15 total points. An outstanding answer is worth 5 points. A complete answer is worth 4 points. Any attempt is worth 3 points. No attempt is worth 0 points. At the end of the grading, the student grading a paper should put the total points awarded by the person's name on the top of the page and return the paper to the student, who should pass it to the instructor after seeing his or her total point score. (A suggested letter grade to be assigned by the instructor is, 13–15 = A; 10–12 = B; 7–9 = C; 6 or below = F.)

5. Assign students a 1–2-page double-spaced paper in which they describe what clinical supervision is and then make an argument for or against the notion that clinical supervision should be provided by the first-line manager.

On the date assigned for turning in the papers, in class ask students to volunteer to describe the nature and purpose of clinical supervision. Once this discussion is completed, ask the students for a show of hands as to whether they made an argument for or against clinical supervision being given by the first-line manager. Following this, ask them to present their arguments for or against the first-line manager providing clinical supervision.

6. Have students get into discussion groups to discuss the question, do you want to be a first-line manager? After 10 minutes or so, ask the groups to report on how those in their group responded to the question.
7. Invite to class two recreational therapist first-line managers from local agencies (or complete a telephone interview with an RT first-line manager). Ask them to describe their roles or what they do as managers of RT units. Then ask them to discuss if they believe their academic preparation was adequate to prepare them to perform as managers. Hopefully, the students will gain insights into the importance of studying RT management as a result of having the first-line managers speak.

3

Understanding the Healthcare Environment

CHAPTER OVERVIEW

The purpose of this chapter is to introduce readers to the policies, issues, and practices within the present U.S. healthcare environment. Historically and presently a large majority of recreational therapists work within a practice setting in which financing is largely a function of the public or private health insurance industry. Today, almost 75% of recreational therapists work in the healthcare environment. An understanding of this environment and the factors that have driven change in this environment remain critically important, particularly to those with management responsibilities.

Key Terms

Affordable Care Act of 2010 (ACA), direct-purchase insurance, employer-based insurance, health insurance, Medicare, Medicaid

Suggested Learning Activities

1. To establish with students that the majority of recreational therapists work in healthcare facilities, complete this exercise. First, use the author-prepared PowerPoint slide showing the types of settings in which RTs work ("Healthcare Settings"). Ask students to write down on a piece of paper the percentage of recreational therapists they estimate work in each setting.

Then ask three or four students to give their estimates, recording their estimations on the board. Once this is done, ask the class to vote which estimate is the most correct.

Once this is done, reveal the author-prepared PowerPoint slide showing the types of settings in which recreational therapists work and the percentages in each employment sector ("Percentages of RTs in Healthcare Sectors"). Compare these correct figures with the students' estimates.

To conclude the exercise, indicate to the students that almost 75% of RTs work in healthcare and then remind them that because they will most likely work in a healthcare facility, it is important for them to gain a grasp of laws, policies, issues, and practices related to the U.S. healthcare environment.

2. In class, verbally give a pop quiz, asking students to define or identify the following terms or abbreviations: (1) Medicare, (2) Medicaid, (3) CMS, and (4) ACA. Then have students self-grade their papers as you review each question by having the students give what they believe is the correct answer to each question and you approving or modifying their answers to provide the most correct answer to each item. Below the correct answers are indicated.
 - (1) Medicare: Created under the Social Security Act Amendment of 1965, Medicare is a federally administered health insurance program to serve citizens who are elderly, as well as some people with long-term disabilities. It is the largest federally funded health insurance program and the single largest payer for health services.
 - (2) Medicaid: Created under the Social Security Act Amendment of 1965, Medicaid is a jointly funded program by the federal government and state governments. Medicaid was initially designed to provide health insurance for citizens living in poverty who had certain health conditions. Under the ACA, Medicaid has been expanded in most states to cover all people below, at, or near the poverty level regardless of health condition.
 - (3) CMS: Centers for Medicare and Medicaid Services.
 - (4) ACA: Affordable Care Act. Also known as "Obamacare." (It established individual and employer mandates for insurance, insurance exchanges and subsidies for direct-purchase insurance, and changes in public payment for health services as well as in structures of care.)

Conclude the pop quiz by telling students that you will not collect and grade their papers and reminding them of the importance of gaining knowledge of each the terms and abbreviations, as they are key to understanding the healthcare environment in the United States.

3. In class, put up the multiple-choice question on the author-prepared PowerPoint slide:

1. The sector in which most CTRSs practice:
 - a. Primary care
 - b. Secondary care
 - c. Tertiary care
 - d. Cancer care

Have each student write down the answer on a piece of paper. Then ask for a show of hands as to which answer (i.e., a, b, c, or d) is correct.

Explain that “b. Secondary care” is the correct answer, and then ask students to identify what services normally fall under “secondary care” (which are surgeries; diagnostic laboratory services; inpatient rehabilitation, including mental health; and pediatric rehabilitation). You may also ask students to identify health-care facilities in and around the university community that offer secondary care services.

4 Basic Management Functions

CHAPTER OVERVIEW

This chapter focuses on introducing the five functions managers perform. The five functions are planning, organizing, staffing, influencing, and controlling. Within the function of staffing, the topic of clinical supervision is emphasized. The chapter closes with a listing of potential pitfalls managers should strive to avoid.

Key Terms

management process, planning, organizing, staffing, influencing, controlling

Suggested Learning Activities

1. Assign students to write a paper of 2-4 double-spaced pages in length in which they define each of the five functions of managers in their own words. On the class date the papers are to be turned in, go over in class the five functions in order by having students read their definitions of each beginning with planning. Once three to four definitions have been given for a function, ask the students which of the definitions seemed to best define the function.
Collect the student papers at the end of class so you can grade them.
2. Divide the students into discussion groups (e.g., 5-8 students/group depending on the size of the class). Request that each group appoint a recorder. Then have the groups discuss specific instances they have encountered when managers made blunders. Put up the provided PowerPoint slide of Table 3.2, Management Blunders to Avoid, for the students' reference. After 10 minutes or so, ask the recorder from each group to report occurrences of blunders they have seen managers make. When all groups have reported, ask the students if particular blunders seemed to stand out or to be common ones.

5 Planning

CHAPTER OVERVIEW

Planning is the first management function. Its purpose is to provide a blueprint for the future of an organization or unit within an organization. This involves (a) identifying goals and objectives based on the organization's and unit's mission, vision, and philosophy; (b) identifying needed resources for accomplishing the goals and objectives; (c) determining action steps to take to achieve each goal; and (d) establishing a timeline for accomplishments.

Key Terms

planning, mission statement, operational planning, vision statement, philosophy, standards of practice, strategic planning, protocols, balance sheet, income statement, cash flow statement, operating budget, indirect costs, cost centers, revenue centers, apportionment, Activity Based Costing (ABC), Full-Time Equivalency (FTE), Cost to Charge Ratio (CCR)

Suggested Learning Activities

1. In class, ask students to write mission and vision statements for an RT organization of their choosing. Then have students describe what is meant by a mission statement. Once it has been determined what a mission statement is, have students at random read (or ask them to volunteer to read) their mission statements to see if they represent valid mission statements.

Then have them describe what is meant by a vision statement. Once it has been established what a vision statement is, have students at random read (or ask them to volunteer to read) their vision statements to see if they represent valid vision statements.

2. In the chapter, a series of steps in planning has been identified. In class, ask students to identify the first step in planning (which is identifying the goals and objectives to be achieved). Then ask, what is the second step? (which is identification of the resources needed to achieve the goals and objectives). Then ask, what is the third step? (which is determining action steps to take). And, finally, ask them to identify the final step in planning (which is establishing a timeline for the action steps and goal achievement).

As each step is identified, write it on the board.

Once all steps have been listed, ask the students, if the first step is identifying goals and objectives, how is this done for an RT department or unit? (From the discussion of this question, students should come to understand that goals and objectives flow out of the department's or unit's mission statement, vision statement, and principally its philosophy.)

3. Give a pop quiz in class, asking students to compare and contrast strategic planning with operational planning. Then discuss the students' answers to this question. At some point in the discussion, show the publisher-supplied PowerPoint slide Table 5.9, Differences Between Strategic and Operational Planning.

To conclude the discussion, ask students if they see links between strategic and operational planning (i.e., the operational plan can be thought of as containing the fine points for executing the strategic plan on an everyday basis). Do not grade the quiz, but remind students that they may be tested on the differences between strategic and operational planning.

4. Invite a manager of an RT department or unit to come to class. During the class prior to the arrival of the manager, instruct students to come to class with at least one question to ask the RT manager in regard to planning.

When you extend the invitation, tell the individual that your students are studying the planning process and will be asking them questions about planning. Also mention that you would particularly appreciate it if he or she would spend time in class explaining the budgeting processes for his or her department or unit. It may enhance the class session to give the guest a copy of Chapter 5 so he or she will know what the students have read.

To begin the class session, ask the RT manager to briefly explain his or her position and the setting in which he or she works.

6 Organizing

CHAPTER OVERVIEW

Organizing is the second management function. It is establishing the structure to get the work done of reaching the identified goals and objectives of the organization or unit within an organization. Organizational structures provide means for the manager to organize tasks, make decisions, and identify an individual's authority and responsibilities. Concepts covered in the chapter include organizational charts, span of control, chain of command, and informal organizations. A five-step procedure is presented for the first-line manager to follow in organizing. Concepts are provided for first-line managers to organize their time, including planning and conducting meetings. The value of first-line managers to understand informal social networks is discussed.

Key Terms

organizing, resources, authority, organizational chart, span of control, chain of command, organizational structures, informal organizations

Suggested Learning Activities

1. Using the author-prepared PowerPoint slide titled "Steps in Organizing for the First-Line Manager," in class ask students to delineate the areas of concern under that step or what needs to be done within that step. (The steps are detailed in the chapter.)
Then ask students to describe examples of the additional area of coordinating with other units or departments (e.g., coordination with the volunteer director to obtain volunteers, coordination with other therapies such as music therapy or occupational therapy for room use or the times programs are provided to avoid conflicts).
2. In class, review the publisher-supplied PowerPoint slide showing Figure 6.1, Example of an Organizational Chart Showing an Organizational Hierarchy. Point out to students that such a chart would only be used in a very large hospital. It is important for students to begin to understand the organizational hierarchy in which therapies (e.g., RT, MT, OT) are found.
3. In class, review the publisher-supplied PowerPoint slide showing Table 6.1, Advantages and Disadvantages of an Organizational Chart. Following this review, ask students if they believe they would develop an organizational chart if they were a manager of an RT department or unit.
4. In class, show the quote by humorist Dave Barry on the author-developed PowerPoint slide. Ask the students for their reactions. If they (like Dave Barry and most people) believe meetings are generally bad, ask students what suggestions they have for improving them.
5. Ask students to explain the nature of informal organizational structures. Once students have a grasp of them, ask them if they have had personal experiences with informal organizational structures in an agency that they would care to relate to the class (not mentioning the name of the agency or names of individuals in their recollection of their experiences). If students do not have experiences to relate, be prepared to provide one from your own personal experiences.

7 Staffing

CHAPTER OVERVIEW

Staffing involves the manager recruiting, selecting, training, retaining, and scheduling employees to ensure there are qualified individuals to fill positions to fulfill the organization's objectives. Areas of concern for the first-line manager in staffing include position descriptions, recruiting, interviewing, selecting staff, scheduling, organizing orientation and in-service training programs, and retaining quality staff.

Key Terms

staffing, position description, scheduling, orientation programs, in-service training

Suggested Learning Activities

1. In class, review with students the five steps involved in staffing using the author-developed PowerPoint slide titled "Five Steps in Staffing." Then ask students to pick the one step they believe to be the most important. Do a tally to determine how many students selected each of the steps as being most important.

While perhaps other selections may be defended, it might be expected that Step 2, "recruit, interview, select, and assign personnel based on job description requirements and performance standards," will likely be selected as being the most important by the majority of students because of the importance of getting the recruitment and hiring process right.

If it is not done well, the hiring process can prove costly in terms of (a) having to repeat time going through the hiring and training process with another person, (b) negative staff morale caused by an employee's lack of skills or work ethic, and (c) the detrimental effect caused by efforts needed to manage inappropriate hires—not to mention the probable detrimental effect on clients in the clinical program.

Whatever step they deem the most important, ask students to provide a rationale for their selection. If they do not select Step 2, inform the students that many would consider Step 2 to be most important because of the reasons provided in the prior paragraph.

2. As a homework assignment, ask the students to locate two job descriptions for positions in RT. Assign them to complete a 1-page double-spaced written analysis for each job description using the criteria for job descriptions found in the chapter. In completing their assignment, students should recommend a letter grade (i.e., A, B, C, D, or F) for the quality of each job description and state a justification for the grade assigned.

You may wish to use the publisher-developed PowerPoint showing Table 7.1, Important Job Description Information, to review with students when making the assignment or when you remind them when the assignment is due.

On the day the papers are due, during class have students volunteer to report on the grade assigned and their analyses of each job description (or randomly select students to report on their analyses). When a student is critical of a job description, ask the student how he or she would improve it.

3. Conduct a mock interview in class. Ask students to volunteer (or assign them) to play the roles of the interviewer and interviewee. The position should be for an entry-level position as a recreational therapist.

Following the completion of the mock interview, ask the student playing the role of the applicant to discuss how well the interviewer did in conducting the interview and in determining the interviewees' fit with the job. Then have the class members discuss how well they thought the interviewer did in conducting the interview and in determining the interviewees' fit with the job.

Possible areas for discussion include the following: Did the interviewer begin by putting the applicant at ease and explaining the plan for the interview? Did the interviewer make an attempt to evaluate if the applicant's manners, appearance, and attitude seemed to be appropriate for the job? Did the interviewer get an indication if the applicant had the background and qualifications to do the job? Did the interviewer ask any inappropriate questions (i.e., discriminatory or illegal)?

8

Influencing

CHAPTER OVERVIEW

Influencing is the fourth management function. It is the link that connects the preparatory functions of planning, organizing, and staffing with the fifth and final function of controlling. Influencing involves the first-line manager evoking action from others to achieve the unit's objectives.

Key Terms

influencing, coaching, autocratic technique, consultative technique, motivation, communication, delegating, conflict

Suggested Learning Activities

1. In class, ask students if they see a difference between coaching and mentoring. Discuss differences so students are clear that they are different functions. This discussion may lead into processes used in coaching that are found in the chapter. These include observing, examining coach motives, creating a discussion plan for the coaching session, initiating while remaining supportive, providing and eliciting feedback, and having follow-up meetings.
2. In class, have students get into small discussion groups (e.g., 4–6 students in each) and appoint a recorder and discussion leader. Ask them to discuss the question, why is change hard for people? Then have the students come up with ways managers may help implement change by asking them, how can managers help implement change?

Following their discussion, have the recorders address each of the two questions, beginning with, why is change hard for people? After all groups report on each question, discuss their responses with the entire class. You may wish to point out similarities among the answers provided by the various groups.

This may lead you to filling in gaps in ways to help implement change that the students perhaps did not cover. You may highlight information from the chapter on bringing about change, including using the PowerPoint slide of Table 8.2, Approaches to Dealing With Resistance.

3. Assign students a paper that is a minimum of 2 double-spaced pages in which they should first explain Herzberg's Motivation-Hygiene Theory and then give examples of ways that they would, as a first-line RT manager, strive to produce a positive work climate that will result in a satisfied work group. Tell students to identify ways to produce a positive work climate that they personally would feel comfortable employing.

On the day assigned for students to turn in their papers, use the papers as a basis for discussion. First, ask students to read their explanations of Herzberg's theory. As each student reads, listen to be sure the explanation is in their own words (not straight out of the textbook). If students take wording directly from the textbook, explain to them that this may be considered plagiarism and therefore is not acceptable.

Then have students share from their papers ways to produce an atmosphere that is satisfying for staff that they would employ as first-line RT managers. Following each student's ideas, discuss them with the class as a whole.

4. During the class period prior to completing this exercise, advise students that they should come to class ready to explain each of the leadership styles.

Then on the day of the exercise, divide the students into six groups and assign each group one of the leadership styles to explain:

- Authoritarian Leadership or Theory X
- Participative Leadership or Theory Y
- Theory Z Leadership
- Bureaucratic Leadership

- Situational Leadership
- Laissez-Faire Leadership

Once all the leadership styles have been presented, list them on the board and ask the students to vote as to which they think would best be used in an RT department or unit. Once the responses are tabulated, ask the students to defend their choice(s).

5. Review in class Clark's suggestions for delivering criticism, using the author-developed PowerPoint slide titled "Clark's Suggestions for Delivering Criticism." Discuss them with the students. Do they think the suggestions are good? Do they believe these will work?

Then have students get into groups of three. Have two students role play an RT manager delivering criticism to a staff member. The third member of the group should serve as an observer who gives feedback to the student taking the role of the RT manager. After the observer comments, the student taking the role of the staff member should express his or her feelings about the delivery of the criticism.

Do this a second time, having the students change roles. Leave it up to them as to who role plays the RT manager and the staff member and who takes the role of observer. Again, have the observer make observations and then the student taking the role of the staff member give his or her reactions.

Once the two role-playing sessions have been completed, discuss with the entire class their reactions. Did they attempt to employ Clark's suggestions? Did any alternative approaches seem to work?

6. Assign students to complete a 2–4-page double-spaced paper in which they develop their own list of a dozen tips for first-line managers in RT to employ during the influencing function. The items in the list should be placed in their level of importance (i.e., number 1 being the most important and number 12 the least important). In developing their lists, students should review within Chapter 8 (a) the "Top Twelve Management Tips in a Changing Workplace," (b) "Tips from Happywork," and "Means to Improve the Influencing Process."

Then, in class on the day the papers are turned in, have students share which tip was number 1 on their lists and why they selected it. You may record a list of the students' number 1 tips and then ask the students at the end of the discussion to vote which seems to be the most important after they have heard the rationale for each.

9

Controlling

CHAPTER OVERVIEW

Controlling is the fifth and final management function. The function of controlling involves measuring actual performance against the objectives planned for. Controlling is monitoring and evaluating the carrying out of the plan to meet the organization's or unit's objectives and making required corrections. Controlling would be meaningless without the planning that preceded it.

Key Terms

controlling, performance appraisal, risk management, quality management, rules and regulations, operating budget

Suggested Learning Activities

1. In class, ask students to define in their own words the function of controlling. Elements that should be included are (a) setting performance standards for meeting objectives, (b) evaluating actual performance by comparing performance to adopted standards, (c) and making required corrections by improving performance or modifying standards.
2. The performance appraisal interview is generally thought to be stressful for the first-line manager and the employee being evaluated. Ask students to identify tips that would be helpful to the first-line manager in conducting performance appraisals. You may wish to record each tip on the board as it is provided. When students have no more tips to give, check the list on the board against those that follow so you may fill in any missing tips.

Tips include the following:

- conduct the evaluation in a professional manner, yet set as relaxed a tone as possible;
 - conduct the interview in a private conference room, rather than on the “manager’s turf” (i.e., in his or her office);
 - reinforce that the purpose of the meeting is for two-way communications so the manager and employee may identify ways to assist the employee to perform to his or her best level;
 - give positive feedback to the employee who consistently displays high levels of performance, to reinforce that behavior and motivate him or her to continue;
 - when improvements are required, focus only on two or three areas of improvement—make follow-up plans to assess progress in areas needing improvement;
 - end the interview with positive remarks about the employee’s performance and express confidence in his or her ability to make improvements;
 - at the conclusion of the session, have the employee sign the completed evaluation form to verify he or she is aware of its contents and then file it in the employee’s personnel file.
3. Ask three students to describe the concept of risk management in one or two sentences of their own words. Record the students’ responses on the board and then ask the class if there is one description they like best—and why.

Likely responses include the following: “a program to identify, assess, and reduce risks to clients, staff, and visitors” or “an organized effort to minimize the incidence of preventable accidents and injuries to clients, staff, and visitors and reduce the risk of financial loss to the organization should someone be harmed.”

Then ask students to indicate the specific goals of risk management, and record these on the board. Responses may include (a) provide clients, staff, and visitors safety by preventing injury or harm; (b) avoid liability exposure by evaluating services and practices (perhaps with a professional liability carrier); (c) maintain an incident report system, which may lead to preventing such events in the future; (d) maintain a quality improvement program to identify areas of risk and minimize potential harm to clients.

Follow up by asking students if they can provide from their personal experiences examples of possible incidents that could lead to accidents and injuries to clients or staff. Possible responses include clients slipping on slick spots on a floor and falling and harming themselves or the water in the showers in a locker room being far too hot and a client being burned by the hot water.

10

Internship Supervision

CHAPTER OVERVIEW

The internship is the final phase of academic preparation or the pinnacle experience in the professional preparation of recreational therapists. Generally, internships are highly structured, full-time capstone field experiences supervised by a credentialed recreational therapist. This chapter interprets the elements constituting the internship from the perspectives of students, universities, and agencies. Specifics are provided for agency first-line managers, site supervisors, and agencies wishing to institute internship programs.

Key Terms

internship, fieldwork or practicum, site supervisor, academic supervisor

Suggested Learning Activities

1. Assign students to familiarize themselves with the National Council for Therapeutic Recreation Certification (NCTRC) requirements for internships by reading from Chapter 10 and from the NCTRC website. Then, in class, have the students indicate the requirements, and list these on the board. You may wish to have your own list of requirements so you can add to the student-developed list if necessary.
2. After first assigning students to read Chapter 10, assign them to view the video titled *Clinical Supervision* produced by Indiana University's Recreation Therapy Video project. The video is available via streaming from the Indiana University Library. To access it, students should type *Recreation Therapy Videos* in the search engine box and look for scholarworks.iu.edu or use the address <https://scholarworks.iu.edu/dspace/handle/2022/3378>

Once the list of RT videos is reached, students need to click on the title *Clinical Supervision*, and the video will come up. The running time is 32 minutes 40 seconds. Inform the students to particularly focus on the roles and functions of the supervisor and supervisee as portrayed in the video. An alternative is to show the video in class and then discuss it with the students.

Discussion questions you may use include the following: What did you think of the portrayal of clinical supervision in the video? Do you understand the roles and functions of the supervisor and supervisee during clinical supervision as portrayed in the video? Were all of the roles and functions of the supervisor described in Chapter 10 covered in the video? Which were missing from the video? Were the students' comments helpful, and if so, in what ways?

3. If any of the students have already completed their internships, in class ask them to comment on the positive and negative features of the internship. And ask them to review Table 10.2, Research on Quality Internship Supervision (available on the publisher-developed PowerPoint slide), to determine if they agree with the research on student reactions to internships.

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Clinical Supervision

CHAPTER OVERVIEW

Clinical supervision is the process that has the dual purpose of promoting the supervisee's professional performance and development as a clinician as well as of protecting the integrity of the agency's program and the welfare of clients. The focus of this chapter is to provide understandings of clinical supervision for those in first-line management positions. The chapter interprets what clinical supervision is, brings out that clinical supervision should be provided by a skilled and seasoned therapist not only for student interns but also for all staff, and supplies information on making a case for clinical supervision and establishing a clinical supervision program. A major recommendation made by the authors is that, if at all possible, clinical supervision should be separate from administrative or management supervision.

Key Terms

clinical supervision, administrative supervision

Suggested Learning Activities

1. If the video titled *Clinical Supervision* was not used in the instruction of the material on internship supervision contained in Chapter 10, it is appropriate to use the video in this unit on clinical supervision. Instruct students to view the video in the way described in the Chapter 10 suggested learning activity. Or the video may be shown in class.

It is recommended that the focus of the students in viewing the video for the purposes of Chapter 11, on clinical supervision, be directed toward the need for all therapists to receive clinical supervision (and not just interns) and the separation of clinical supervision from administrative supervision. Therefore, students should be directed toward these aspects of clinical supervision, and your discussion questions should focus on these aspects.

2. Assign students to write a 4–6-page double-spaced paper titled *A Rationale for the Establishment of a Clinical Supervision Program*. The essence of the paper is to prepare a proposal that a first-line manager of a hypothetical RT unit would submit to his or her boss as a basis for establishing a clinical supervision program for staff for which none has existed previously.

Encourage students to include the following elements in their papers: (a) define what is meant by clinical supervision, including how it differs from administrative supervision; (b) present a rationale for establishing the clinical supervision program by presenting persuasive arguments of its potential benefits; (c) explain the unit already has a seasoned recreational therapist who has the background to provide clinical supervision, so a new staff member would not be required; (d) discuss the responsibilities of the person providing clinical supervision, the amount of time he or she would give to providing clinical supervision to staff (the number of staff in this hypothetical situation is to be set by the student), and how the person will be evaluated; and (e) explain the steps necessary to establish the clinical supervision program.

An additional activity would be, on the day the papers are due, to have the students discuss what they perceive to be persuasive arguments for establishing a clinical supervision program.

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Volunteer Management

CHAPTER OVERVIEW

Volunteers are unpaid individuals who give their time to help others. Volunteers in RT entities offer the first-line manager and his or her staff resources to serve in support of the RT program. With the use of volunteers comes responsibilities on the part of the first-line manager including gaining the support of his or her staff to use volunteers in the program, planning for using volunteers, recruiting and selecting volunteers, offering training for volunteers, providing volunteer supervision, conducting volunteer evaluation and recognition programs, and retaining volunteers.

Key Terms

volunteer, formative evaluation, summative evaluation

Suggested Learning Activities

1. In small discussion groups, have students compare and contrast their personal volunteer experiences with the recommendations in the chapter on setting up and conducting volunteer programs. Ask each group to appoint a discussion leader and a recorder, who will present the highlights of the discussion to the entire class.
The following are possible questions you may wish to suggest for their discussion: Did the agency where you volunteered interview you? Was any training provided for you? Was an individual provided to answer your questions and provide supervision? Were there areas in which the agency's volunteer program might have been improved?
After sufficient time for the group discussions, ask each recorder to give the highlights of the group's discussion. Encourage discussion of the group reports by the entire class. At the conclusion of the discussion, ask the students to summarize what they thought were the main points brought out during the discussion.
2. Invite a first-line RT manager who has a volunteer program to come to class. Provide him or her with a copy of Chapter 12, Volunteer Management, prior to this person coming to class. Ask the RT manager to talk about his or her agency and the volunteer program within the RT program. Then conduct a Q&A session with the invited guest during which students can ask questions. You may wish to have a question to ask to get the Q&A session started.

13

Managing Marketing

CHAPTER OVERVIEW

Marketing has been defined by Winton and Hochstadt (2011) as “how you reach those who need to know you’re out there and will want to support you.” This chapter is aimed at the level of the first-line manager. It provides an introduction to marketing and explains internal and external marketing. It concludes with a segment on the topic of promoting the RT profession.

Key Terms

marketing, internal marketing, external marketing, advertising, public relations, publicity, marketing targets

Suggested Learning Activities

1. Assign Chapter 13, Managing Marketing, as a reading assignment. On the day the students should have read the assignment, give a pop quiz over the seven key terms found in the introduction to the chapter. After students have written their answers, have them write their name on the top of their paper and exchange papers once and then once again for the purposes of grading.

Instruct students to grade the items 4 for an *A* or complete answer, 3 for a *B* for a less than complete but better than average answer, and 2 for making an attempt to give an answer, and 0 for no answer and to record the total grade on the top of the sheet next to the name of the student. A perfect score would be 28 points (4 times the 7 terms).

Go over the terms, giving the correct answer from the definitions provided in the introduction to the chapter. Students will likely ask if a definition provided by the person they are grading is correct. This will offer you an opportunity to ask class members if they believe it is correct. (Of course, you should have the final say as to whether or not the answer is correct.)

At the end of the grading, collect the papers to record the students’ scores.

2. Show and read the author-developed PowerPoint slides of the quotes of Tom Stewart and Masri, Oetjen, and Rotarius regarding internal marketing. Then have the students react to each of the quotes. Do they agree with them or not? Why?

This discussion should result in an understanding of internal marketing and its place within marketing programs.

3. Ask students if they believe all recreational therapists have an obligation to promote their profession? Then, if they agree they do have a responsibility, ask them to identify means they can use to promote their profession.

14 Issues and Concerns for Managers

CHAPTER OVERVIEW

There are a number of issues and concerns related to the management of RT services. Within Chapter 14, a variety of prevalent issues and concerns are covered:

- Workplace politics
- Transitioning to manager
- Professional etiquette
- Working with your supervisor
- Networking
- Stress
- Burnout
- Supporting research
- Mentoring

These issues and concerns are approached from the perspective of a first-line manager. For example, the segment on mentoring provides a list of elements that can be used as a step-by-step means to establishing a mentorship program.

Whether to cover every topic within the chapter with students is, of course, at the discretion of the instructor. Some topics are rarely found in the RT literature (e.g., workplace politics, professional etiquette, networking, mentoring), so instructors may wish to give these topics attention as students otherwise may not receive information on them.

Key Terms

workplace politics, negative workplace politics, positive workplace politics, professional etiquette, networking, stress, burnout, research, mentoring

Suggested Learning Activities

Workplace Politics

1. Discuss with students in class what is meant by workplace politics. Once students seem to grasp the concept of workplace politics, ask them if they have encountered negative workplace politics (not naming names or places). If they have, were they dealt with successfully? If they were not dealt with, could they have been dealt with successfully?

Transitioning to Manager

2. Discuss in class what recommendations students might have for the recreational therapist who has just been appointed to the position of RT manager. Begin by asking the students what one particular thing, if any, the new RT manager should do when he or she is first in the job. Once that question is discussed, ask students about what other things the new RT manager might do to ease the transition into his or her new position.
3. Show the students the publisher-developed PowerPoint slide of Table 14.1, Tips to Launching a Successful Supervisory Career. Then ask students to form into small discussion groups with a discussion leader and recorder, who will report on the discussion of the group. Ask each group to examine the items on Table 14.1 and select the three items they feel are most important and to be prepared to defend their choices.

Each recorder should report which items the group selected and why they determined these were the most important. As they report, jot down on the board the three selected by each group. After all groups have reported, check to see if there is overlap among any of the lists and point out any duplication to the students. Then

ask the students to vote as to which group selected the best items. Once the voting has been completed, have the students talk about why the selected list stood out.

Professional Etiquette

4. Assign students to read the Professional Etiquette section in Chapter 14. After their reading of the assignment, in class ask for a show of hands of students who had not received any instruction on professional etiquette in their courses prior to taking your course. Follow up by asking for a show of hands of those who believe they can benefit from becoming more aware of professional etiquette.

It is unlikely that any had prior training on professional etiquette. It might be anticipated that they will want to learn more about professional etiquette.

Then ask the students what portion of the reading on professional etiquette stood out the most to them. For instance, was it making introductions or was it meeting, dressing, or dining etiquette? Receive any comments students care to make on what stood out to them.

If you wish to do something active with the students, role play on making introductions and ask students viewing the introductions to critique them following the guidelines in the chapter.

Working With Your Supervisor

5. In class, review the PowerPoint slides showing Table 14.4, Tips for Maintaining a Good Relationship With Your Boss, and Table 13.5, Rules for Managing Your Boss. Ask the students to indicate which tips they think are particularly good.

Networking

6. In class, ask students to define networking in their own words. Then have them identify ways that recreational therapists can network, and list them on the board. Whether or not it is mentioned by students, emphasize the idea to them that going to workshops and conferences provides excellent means to network. Also point out that becoming professionally involved by serving on committees of professional associations (e.g., state RT associations or ATRA) is a great way to network.

Then review the PowerPoint slide showing Table 14.6, Characteristics of Successful Networkers, with students. When you have reviewed the list, ask students if they have used any of the ideas listed and if these worked for them.

Stress

7. In class, ask students to identify things that cause stress for recreational therapists. As they answer, jot their thoughts on the board. When a number have been named, point out that some are internal causes of stress and some are external causes of stress. You may wish to indicate of those identified which have internal causes and which have external causes.

Once the causes of stress have been identified, ask the students what actions the RT manager can take to help reduce staff stress. List these on the board, and as you do, you may wish to elaborate on them or provide examples of them. (Strategies that managers can take to reduce stress are found in the chapter.)

Burnout

8. Assign students to read the segment of the chapter on burnout and to complete an out-of-class, open-book test containing the following questions: Question 1: Provide a written definition of burnout. Question 2: List at least three objectives, signs, or symptoms of burnout. Question 3: List at least three subjective signs or symptoms of burnout. Question 4: List and briefly describe the three stages that individuals pass through when burning out. Question 5: Indicate how clinical supervision can help staff deal with burnout. Students should place their answers on no more than 2 double-spaced pages that they will turn in during class on the assigned date.

On the day papers are due, in class, ask students to volunteer answers (or randomly ask students to provide answers). Then collect papers for grading.

Supporting Research

9. Assign students to locate and critique a research study from the *American Journal of Recreation Therapy*, the *Therapeutic Recreation Journal*, or ATRA's *Annual in Therapeutic Recreation* that relates directly to the practice of RT. The critique should be from 2–4 double-spaced pages. A copy of the article should be stapled to the paper.

The complete citation for the article should appear at the top of the paper. Sections of the paper should include Introduction (explaining the problem being investigated and the purpose of the investigation), Method (describing methods used to conduct the study), Results (report results found), Discussion (interpretation of the findings and implications for practice), and Conclusion (student's assessment of the worth of the article).

Mentoring

10. Ask two or three recreational therapists to come to class to discuss mentoring. These individuals should ideally believe in the concept of mentoring and have a formal mentoring program at their agency. Ask them to talk about their personal experiences with being mentored or mentoring someone. Then ask them if their agency has a mentoring program and, if so, to describe it. If their agency does not have a formal mentoring program, ask them what benefits might be derived from establishing a mentoring program in their agency. Then invite students to ask questions they may have about mentoring.