Instructor Name: Sherrilene Classen, PhD, MPH, OTR/L, FAOTA, FGSA  
Room Number: 2107  
Phone Number: 273-6883  
Email Address: sclassen@phhp.ufl.edu  
Office Hours: Thursday, 1.00-3.00 PM  
Preferred Course Communications: email

Instructor Name: Christine Myers, PhD., OTR/L  
Room Number: 2111  
Phone Number: 273-6128  
Email Address: ctmyers@phhp.ufl.edu  
Office Hours: By appointment- please email to request a time  
Preferred Course Communications: email

Instructor Name: Becky Piazza, OTD, OTR/L, BCPR  
Room Number: 2110  
Phone Number: 273-6096  
Email Address: bsumm@phhp.ufl.edu  
Office Hours: By appointment – please email to request a time  
Preferred Course Communications: email

**Prerequisites:** OTH 6819 Competency

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**PURPOSE AND OUTCOME**

**Course Overview:** This course explores leadership theories and practices, and their application to leadership in Occupational Therapy practice and education. Self-directed professional development and leadership responsibilities for the professional development of others are addressed. In addition to the above, the course will also explore leadership behaviors and their application to personal and organizational leadership.

**Course Objectives:**

<table>
<thead>
<tr>
<th>Student Learning Objectives- Upon successful completion of the course, students will be able to:</th>
<th>ACOTE Standard(s)</th>
<th>Curricular Theme(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Understand the characteristics of personal leadership to craft a leadership philosophy</td>
<td>n/a</td>
<td>Professionalism</td>
</tr>
<tr>
<td>Conceptualize the “five leadership practices” and apply these conceptualizations to hypothetically resolving an existing or emerging leadership challenge.</td>
<td>n/a</td>
<td>Critical Thinking; Professionalism</td>
</tr>
<tr>
<td>Develop and complete a strategic plan for organizational effectiveness.</td>
<td>B.5.3. Business Aspects of Practice</td>
<td>Critical Thinking</td>
</tr>
</tbody>
</table>
Compare and contrast personal and professional responsibilities regarding liability and contractual arrangements across service delivery models.

B.7.5. Personal and Professional Responsibilities

<table>
<thead>
<tr>
<th>Task</th>
<th>Professionalism</th>
</tr>
</thead>
<tbody>
<tr>
<td>Develop a professional portfolio to showcase clinical and training experiences to potential employers.</td>
<td>n/a</td>
</tr>
<tr>
<td>Describe the role of the mentor and mentee in professional development.</td>
<td>n/a</td>
</tr>
<tr>
<td>Demonstrate an understanding of the resources available for starting a private practice in occupational therapy.</td>
<td>n/a</td>
</tr>
</tbody>
</table>

**Instructional Methods:** In-class seminar type activities including lecture, small group work, case examples, and experiential learning.

**Textbooks:**

2. FranklinCovey. Leadership Great Leaders. Great Teams. Great Results (Note: Handouts will be posted on Canvas, or integrated in the Power Point slides)
## DESCRIPTION OF COURSE CONTENT

### Topical Outline/Course Schedule

<table>
<thead>
<tr>
<th>Week</th>
<th>Topic(s)</th>
<th>Readings/Assignments</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Leadership</strong></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
| 1 5/12 | Fundamentals of Personal and Organizational Leadership  
- Definitions, Characteristics, Behaviors, Styles  
- Whole-Person Paradigm  
- Levels of Engagement  
- Imperative of Great Leaders  
- DISC Profile  
- Reflection Questions Discussion: Dr. Piazza  
- Guest Speaker: Ms. Irma Alvarez | FranklinCovey, p. 5-11 (Integrated in PowerPoint presentation)  
Kouzes and Posner, pp. 11-24; pp 295-314  
Handout on Leadership Styles |
| 2 5/19 | Five Leadership Practices  
- Practice 1: Model the Way  
- Practice 2: Inspire a Shared Vision  
- Reflection Questions Discussion: Dr. Piazza  
- Guest Speaker: Ms. Elise Canton | Kouzes and Posner, pp. 45-71; 93-117  
Handout: Leadership Philosophy |
| 3 5/26 | Five Leadership Practices  
- Practice 3: Challenge the Process  
- Reflection Questions Discussion: Dr. Piazza  
- Guest Speaker: Dr. Charles Ellis | Kouzes and Posner, pp.143-169  
Assignment: Leadership Practices  
Initial Posting (due by 5/26 at 5:00pm)  
and Two Responses to Peers’ Postings (due by 5/28 at 11:59pm) |
| 4 6/2 | Five Leadership Practices  
- Practice 4: Enable others to Act  
- Reflection Questions Discussion: Dr. Piazza  
- Guest Speaker: Dr. Jim Weese | Kouzes and Posner, pp.193-219  
Classen et al., 2021  
Assignment: Leadership Practices  
Initial Posting (due by 6/2 at 5:00pm)  
and Two Responses to Peers’ Postings (due by 6/4 at 11:59pm) |
| 5 6/9 | Five Leadership  
- Practice 5: Encourage the Heart  
- Reflection Questions Discussion: Dr. Piazza  
- Guest Speaker: Dr. Charles Christiansen | Kouzes and Posner, pp. 245-271  
Handout. Conscious Club.  
Assignment: Leadership Practices  
Initial Posting (due by 6/9 at 5:00pm)  
and Two Responses to Peers’ Postings (due by 6/11 at 11:59pm) |
| 6 6/16 | Strategic Planning for Organizational Effectiveness  
- Vision  
- Mission  
- Values  
- Purpose  
- SWOT  
- Reflection Questions Discussion: Dr. Piazza  
- Example of a Service Program requiring Strategic Planning: Dr. Classen | FranklinCovey Method for Strategic Planning p. 33-54 (Integrated in PowerPoint presentation)  
Assignment: Strategic Planning Paper and Group Presentation (due 7/21 at 6:00pm) |
<table>
<thead>
<tr>
<th>Week</th>
<th>Topic(s)</th>
<th>Readings/Assignments</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Summer Break</strong></td>
<td>6/23- no class</td>
<td></td>
</tr>
<tr>
<td><strong>Professional Development</strong></td>
<td></td>
<td></td>
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</table>
| 7 | Preparing for Your OT Career  
- What is a Professional Portfolio?  
- Writing a Resume or CV  
- Preparing for a Job Search  
*Guest Speaker:* Matthew Cowley, Associate Director for Integrated Partnerships, Career Connections Center | Deluilis (2019) Ch. 11.  
Assignment: Professional Development Initial Posting (due by 6/30 at 5:00pm) and Two Responses to Peers’ Postings (due by 7/2 at 11:59pm)  
Assignment: Resume with Reflective Questions (Due 7/7 at 6:00pm) |
| NOTE: Class will be 3-5pm | | |
| 8 | Preparing for Your OT Career (cont.)  
- Interview Skills  
- How to Negotiate with an Employer  
*Guest Speaker:* Matthew Cowley, Associate Director for Integrated Partnerships, Career Connections Center | Review Career Resources at [http://www.otjoblink.org/](http://www.otjoblink.org/)  
Additional readings to be posted on Canvas  
Assignment: Leadership Practices Initial Posting (due by 7/7 at 5:00pm) and Two Responses to Peers’ Postings (due by 7/9 at 11:59pm) |
| NOTE: Class will be 3-5pm | | |
| 9 | Career Development  
- Planning Your Career Trajectory  
- Goal Setting  
- Continuing Competency  
Building the Mentor/Mentee Relationship | Doyle, Lachter & Jacobs (2018)  
Additional readings to be posted on Canvas  
Assignment: Five Year Plan with Reflective Questions (due by 7/28 at 5:00pm)  
Assignment: Leadership Practices Initial Posting (due by 7/14 at 5:00pm) and Two Responses to Peers’ Postings (due by 7/16 at 11:59pm) |
<p>| 10 | Student Presentations: Strategic Planning for Organizational Effectiveness | Assignment: E-Portfolio Updates (due by 8/4 at 11:59pm) |</p>
<table>
<thead>
<tr>
<th>Week</th>
<th>Topic(s)</th>
<th>Readings/Assignments</th>
</tr>
</thead>
</table>
| 11 7/28 | Starting Your Own Business in Occupational Therapy Understanding Liability and Contract Work  
*Guest Speakers*: Panel of OTs (TBA) | Hudgins, Stover & Walsh-Sterup (2018)  
Thornton (2010)  
Kuehn: *Occupational Therapy and Entrepreneurship*  
Read blogs about OT’s experiences as contract therapists (see Reflection Paper assignment)  
Review www.sba.gov  
Assignment: Leadership Practices Initial Posting (due by 7/28 at 5:00pm) and Two Responses to Peers’ Postings (due by 7/30 at 11:59pm)  
Assignment: Understanding Liability and Contract Work (due by 8/4 at 5:00pm) |
| 12 8/4 | Preparing for the NBCOT Exam- Developing a Study Plan  
Preparing for Licensure | Explore exam prep resources at www.aota.org and www.nbcot.org  
Review licensure requirements at https://floridasoccupationaltherapy.gov/  
Additional readings to be posted on Canvas |

**Course Materials and Technology**

For technical support for this class, please contact the UF Help Desk at:

- Learning-support@ufl.edu
- (352) 392-HELP - select option 2
- https://lss.at.ufl.edu/help.shtml

**ACADEMIC REQUIREMENTS AND GRADING**

**Assignments:**

- **(a) Leadership philosophy and (b) plan to address DISC characteristics:** Assignment information, grading criteria, and submission link available on Canvas.
- **(a) Four leadership practices- initial postings and (b) four responses to a peers’ postings during week 2-5:** Assignment information and grading criteria available on Canvas. Submit to “Discussions”.
- **(a) Strategic planning paper and (b) Group presentation of the paper:** Assignment information, grading criteria, and submission link available on Canvas.
- **(a) Four professional development initial postings and (b) four responses to a peers’ postings during week 7-9 and 11:** Assignment information and grading criteria available on Canvas. Submit to “Discussions”.
• **Resume with Reflective Questions**: For this assignment you will update your resume and respond to reflective questions about your professional qualities in preparation for your future job search. Assignment information, grading criteria, and submission link available on Canvas.

• **Five Year Plan with Reflective Questions**: For this assignment you will create a five year professional career plan and respond to reflective questions about your future as an occupational therapist. Assignment information, grading criteria, and submission link available on Canvas.

• **E- Professional Portfolio**: For this assignment you will update your e-portfolio to include your resume, fieldwork activities, and capstone activities. Assignment information, grading criteria, and submission link available on Canvas. Submit the link to your e-portfolio to Canvas.

• **Active group participation with guest speakers**: It is expected that you come prepared to ask questions of guest speakers during each class. Students who do not ask questions or participate in group discussions will not receive the full five points for this grade. Grading criteria available on Canvas.

**Grading**

<table>
<thead>
<tr>
<th>Start Date- Due Date</th>
<th>Requirement</th>
<th>Points</th>
</tr>
</thead>
<tbody>
<tr>
<td>5/12-5/17/2021</td>
<td>(a) Articulate your leadership philosophy (b) According to your DiSC profile, address how you will optimize your talents, balance your influence, enhance your communication and conflict skills, strengthen your teamwork, and increase your overall effectiveness as an entry scholar and practitioner.</td>
<td>(a)= 5 points (b)= 5 points Total = 10 points</td>
</tr>
<tr>
<td>5/19-6/8/2021</td>
<td>(a) Four leadership practices initial posts- 300-350 words responding to discussion prompts (b) Post two responses to a peer’s postings, every week, during week 2-5 (100 word minimum)</td>
<td>(a) 4 x 4 points (b) 4 x 1 point Total = 20 points</td>
</tr>
<tr>
<td>6/16-7/21/2021</td>
<td>(a) Strategic planning paper Group presentation of the paper</td>
<td>(a) = 15 points (b) = 5 points Total 20 points</td>
</tr>
<tr>
<td>6/28-7/30/2021</td>
<td>(a) Four professional development initial posts- 300-350 words responding to discussion prompts (b) Post two responses to a peer’s postings, every week, during week 2-5 (100 word minimum)</td>
<td>(a) 4 x 4 points (b) 4 x 1 point Total = 20 points</td>
</tr>
<tr>
<td>6/30-7/7/2021</td>
<td>Resume with Reflective Questions</td>
<td>10 points</td>
</tr>
<tr>
<td>7/14-7/28/2021</td>
<td>Five Year Plan with Reflective Questions</td>
<td>10 points</td>
</tr>
<tr>
<td>7/28-8/4/2021</td>
<td>Understanding Liability and Contract Work Reflection</td>
<td>5 points</td>
</tr>
<tr>
<td>7/21-8/4/2021</td>
<td>E- Professional Portfolio*</td>
<td>P/F</td>
</tr>
<tr>
<td>Entire semester</td>
<td>Active group participation with guest speakers</td>
<td>5 points</td>
</tr>
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</table>

|  | 100% |

* Portfolio will be returned for revision if it does not meet the criteria for a passing grade. To pass this class all portfolio requirements must be met with a passing grade. Reminder: see posted graded rubric for requirements.
Points earned

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</thead>
<tbody>
<tr>
<td>Letter Grade</td>
<td>A</td>
<td>A-</td>
<td>B+</td>
<td>B</td>
<td>B-</td>
<td>C+</td>
<td>C</td>
<td>D+</td>
<td>D</td>
<td>D-</td>
<td>E</td>
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</tbody>
</table>

Letter Grade

<table>
<thead>
<tr>
<th>Letter Grade</th>
<th>A</th>
<th>A-</th>
<th>B+</th>
<th>B</th>
<th>B-</th>
<th>C+</th>
<th>C</th>
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<tbody>
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<td>Grade Points</td>
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<td>3.33</td>
<td>3.0</td>
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<td>2.33</td>
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<td>1.33</td>
<td>1.0</td>
<td>0.67</td>
<td>0.0</td>
</tr>
</tbody>
</table>

For greater detail on the meaning of letter grades and university policies related to them, see the Registrar’s Grade Policy regulations at http://catalog.ufl.edu/ugrad/current/regulations/info/grades.aspx

Exam Policy: There are no exams in this class

Policy Related to Attendance, Make up Exams or Other Work
There are no exams in this class. All course assignments are due on the day noted in the syllabus unless otherwise negotiated with instructor. OTD students are required to attend all course and program activities. For detailed description of these policies see the OTD Student Handbook.

Please note: Any requests for make-ups due to technical issues MUST be accompanied by the ticket number received from LSS when the problem was reported to them. The ticket number will document the time and date of the problem. You MUST e-mail me within 24 hours of the technical difficulty if you wish to request a make-up.

All faculty are bound by the UF policy for excused absences. For information regarding the UF Attendance Policy see the Registrar website for additional details: https://catalog.ufl.edu/ugrad/current/regulations/info/attendance.aspx

STUDENT EXPECTATIONS, ROLES, AND OPPORTUNITIES FOR INPUT

Expectations Regarding Course Behavior For further information about the material provided below see the relevant sections of the OTD Student Handbook or the websites provided.

Communication Guidelines
- Treatment of peers, professors, teaching assistants, guest lecturers, clinical personnel, with consideration, confidentiality, and respect.
- Students are expected to actively participate in discussions and lab activities. Participation assists students to develop knowledge and skill in interpersonal relationships and communication by relating to patients and families with various backgrounds and performance deficits, by relating to other students, therapists and supervisors, students gain an understanding of relationships in professional role. Personal responsibility for prompt arrival, and regular participation and attendance all course activities; with appropriate and judicious use of class and lab time.

Professional Behavior
- Assumption of responsibility in keeping classroom in order and laboratory materials properly utilized and stored.
- **Students are expected to be thoroughly prepared for class.** Students are expected to read and study assigned readings in text and course syllabus prior to coming to class. Students are expected to bring all materials necessary to effectively participate or those specifically designated by the instructor to class or lab.
- Professional work habits also include: being on time for class and staying until class is dismissed; being courteous in lecture and lab by refraining from chatter or other distracting behaviors; turning off all electronic devices that are not critical for formal classroom activities; not reading other material during
class; meeting deadlines; arranging with instructor or peer to get handouts or announcements if unable to attend class; arranging with the instructor in advance if unable to meet scheduled tests and assignments.

- Professional attire in lectures and labs when there are guests, in all clinics and site visits.
  - Clean long khaki or black pants that remain fitted when moving and bending.
  - Collared, adequately fitting shirt that is neither clingy nor revealing and remains discretely tucked into pants when reaching and moving. No T-shirts.
  - Clean, closed toe shoes with adequate base of support.
  - Jewelry & make-up kept to a minimum. No hats. No fragrances. Tattoos must be covered.

- Lecture notes and/or Power Point slides are provided solely at the discretion of the presenter. Regardless of the provision of lecture notes/Powder Point slides, students are responsible for all materials assigned and covered in class, labs, and site visits.

- Laptops/Tablets: Laptops/tablets may be used in class for taking notes, viewing slides, or accessing websites associated with ongoing class activities. Students are not allowed to use laptops/tablets in class for any other reason. Topic instructors may further limit or prohibit the use of laptop/tablet used during their presentations.

Academic Integrity

Students are expected to act in accordance with the University of Florida policy on academic integrity. As a student at the University of Florida, you have committed yourself to uphold the Honor Code, which includes the following pledge:

“We, the members of the University of Florida community, pledge to hold ourselves and our peers to the highest standards of honesty and integrity.”

You are expected to exhibit behavior consistent with this commitment to the UF academic community, and on all work submitted for credit at the University of Florida, the following pledge is either required or implied:

“Oh my honor, I have neither given nor received unauthorized aid in doing this assignment.”

It is your individual responsibility to know and comply with all university policies and procedures regarding academic integrity and the Student Honor Code. Violations of the Honor Code at the University of Florida will not be tolerated. Violations will be reported to the Dean of Students Office for consideration of disciplinary action. For additional information regarding Academic Integrity, please see Student Conduct and Honor Code or the Graduate Student Website for additional details:

https://www.dso.ufl.edu/sccr/process/student-conduct-honor-code/
http://gradschool.ufl.edu/students/introduction.html

Please remember cheating, lying, misrepresented, or plagiarism in any form is unacceptable and inexcusable behavior.

Online Faculty Course Evaluation Process

Students are expected to provide feedback on the quality of instruction in this course by completing online evaluations at https://evaluations.ufl.edu. Evaluations are typically open during the last two or three weeks of the semester, but students will be given specific times when they are open. Summary results of these assessments are available to students at https://evaluations.ufl.edu/results/.

SUPPORT SERVICES

Accommodations for Students with Disabilities

If you require classroom accommodation because of a disability, you must register with the Dean of Students Office http://www.dso.ufl.edu within the first week of class. The Dean of Students Office will provide documentation of accommodations to you, which you then give to me as the instructor of the course to receive accommodations. Please make sure you provide this letter to me by the end of the second week of
the course. The College is committed to providing reasonable accommodations to assist students in their coursework.

Counseling and Student Health

Your well-being is important to the University of Florida. The U Matter, We Care initiative is committed to creating a culture of care on our campus by encouraging members of our community to look out for one another and to reach out for help if a member of our community is in need. If you or a friend is in distress, please contact umatter@ufl.edu so that the U Matter, We Care Team can reach out to the student in distress. A nighttime and weekend crisis counselor is available by phone at 352-392-1575. The U Matter, We Care Team can help connect students to the many other helping resources available including, but not limited to, Victim Advocates, Housing staff, and the Counseling and Wellness Center. Please remember that asking for help is a sign of strength. In case of emergency, call 9-1-1.

Students sometimes experience stress from academic expectations and/or personal and interpersonal issues that may interfere with their academic performance. If you find yourself facing issues that have the potential to or are already negatively affecting your coursework, you are encouraged to talk with an instructor and/or seek help through University resources available to you.

- The Counseling and Wellness Center 352-392-1575 offers a variety of support services such as psychological assessment and intervention and assistance for math and test anxiety. Visit their web site for more information: http://www.counseling.ufl.edu. On line and in person assistance is available.
- You Matter We Care website: http://www.umatter.ufl.edu/. If you are feeling overwhelmed or stressed, you can reach out for help through the You Matter We Care website, which is staffed by Dean of Students and Counseling Center personnel.
- The Student Health Care Center at Shands is a satellite clinic of the main Student Health Care Center located on Fletcher Drive on campus. Student Health at Shands offers a variety of clinical services. The clinic is located on the second floor of the Dental Tower in the Health Science Center. For more information, contact the clinic at 392-0627 or check out the web site at: https://shcc.ufl.edu/
- Crisis intervention is always available 24/7 from: Alachua County Crisis Center (352) 264-6789 http://www.alachuacounty.us/DEPTS/CSS/CRISISCENTER/Pages/CrisisCenter.aspx

Do not wait until you reach a crisis to come in and talk with us. We have helped many students through stressful situations impacting their academic performance. You are not alone so do not be afraid to ask for assistance.

Inclusive Learning Environment

Public health and health professions are based on the belief in human dignity and on respect for the individual. As we share our personal beliefs inside or outside of the classroom, it is always with the understanding that we value and respect diversity of background, experience, and opinion, where every individual feels valued. We believe in, and promote, openness and tolerance of differences in ethnicity and culture, and we respect differing personal, spiritual, religious and political values. We further believe that celebrating such diversity enriches the quality of the educational experiences we provide our students and enhances our own personal and professional relationships. We embrace The University of Florida’s Non-Discrimination Policy, which reads, “The University shall actively promote equal opportunity policies and practices conforming to laws against discrimination. The University is committed to non-discrimination with respect to race, creed, color, religion, age, disability, sex, sexual orientation, gender identity and expression, marital status, national origin, political opinions or affiliations, genetic information and veteran status as protected under the Vietnam Era Veterans’ Readjustment Assistance Act.” If you have questions or concerns about your rights and responsibilities for inclusive learning environment, please see your instructor or refer to the Office of Multicultural & Diversity Affairs website: www.multicultural.ufl.edu.