

DISSERTATION

TRAVERSING THE ORGANIZATIONAL LANDSCAPE:  
PERSONAL NARRATIVE AND THE CHANGED SELF

Submitted by

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In partial fulfillment of the requirements

For the Degree of Doctor of Philosophy

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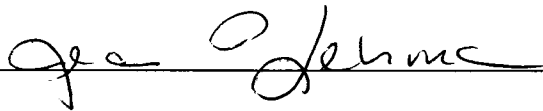
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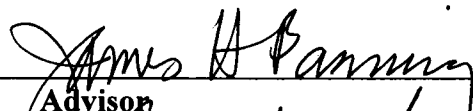
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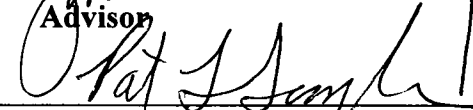
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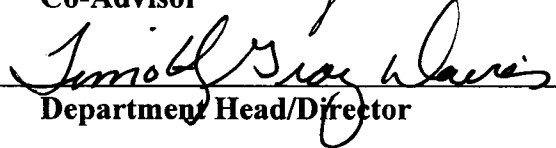
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ABSTRACT OF DISSERTATION

TRAVERSING THE ORGANIZATIONAL LANDSCAPE:  
PERSONAL NARRATIVE AND THE CHANGED SELF

This research study utilized the methods of autoethnography, a genre of qualitative research that portrays the experiences of the researcher through participant observations, while simultaneously depicting the larger cultural context. The question guiding this research asked, “As an emerging leader within a healthcare organization, what are my experiences initiating a change process and what meanings do I derive from them?”

Fullan’s (2001) model of leading in a culture of change provided the conceptual framework for this study. His five components of effective leadership were described early on, allowing later comparison to be made between his model and this researcher’s lived experience. While Fullan portrayed five distinct and consecutive components, this researcher’s experience depicted a more collaborative approach with less distinction between and different chronological order between components. Additionally, building effective working relationships was evidenced throughout the entire manuscript, rather than Fullan’s portrayal of relationships as a separate component.

Data were coded and presented as a series of chronological vignettes. The use of personal narrative for this research study was intended to expose the reader and

researcher to poignant experiences so that reflections and meaning about the change process may be evoked.

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## PROLOGUE

As you flip the pages, or scroll down on your computer screen, expecting to read a traditional, five-chapter manuscript, you may find the format and contents which fill the following pages somewhat unexpected. But if the purpose for your reading does not hold you to the typical manuscript format as a key requirement, you might inquire further. In doing so, you will encounter the following eight chapters and an epilogue.

While the structure should not strike you as markedly different from other research manuscripts, the type of writing may be much different than you are accustomed to reading. Just as this prologue is written, the body of this manuscript is written most entirely as a narrative.

The first chapter begins with a narrative piece and is intended to drop you into my thoughts about newly working in an organizational environment. In this case, the organization is a hospital and I am an Occupational Therapist. The typical “introduction” is enacted on paper, so as the reader, you can quickly come up to speed about the purpose of this study.

Within chapter two, I predominately cover two bodies of knowledge: The theoretical framework and methodology that have informed this study. This allowed me to learn Fullan’s (2001) *Leading in a Culture of Change* inside and out, as well as explore the creative realm of ethnographic research methods. Autoethnography is a rather fascinating research methodology and those inclined to be more introspective, may also find it rather intriguing. And while I committed to my research committee to reflect a more traditional literature review, I would not have been true to this research

methodology without incorporating a snippet or two of personal narrative throughout this piece.

More than any other chapter, the third one is most typical of other research manuscripts. In it, I cover all the details of how the data were gathered, coded, and analyzed. Reliability and generalizability are addressed and research questions are posed. Considering the type of data collected for this study were personal documents, in the form of written field notes, the analysis involves writing up those data in a meaningful way. This is how the following four chapters came into existence.

Chapters four through seven are written as personal narratives of my experience as a new leader, within the health care organization. These narratives depict my lived experiences and in essence, are the analysis of my data. These four chapters essentially meet the same analysis requirements of a traditional fourth chapter.

The final chapter depicts the process I followed for data coding and analysis, as well as highlights some my experiences from the previous four chapters, as they reflect Fullan's (2001) core constructs of effective leadership. By touching on each chapter, I am able to discuss what learning came about by analyzing my lived experience.

The epilogue is intended to provide some final reflections on what I learned by undertaking this personal journey. I hope you are able to take something meaningful from reading what has been a personally humbling, yet gratifying experience.

## CHAPTER ONE

### FIRST GLIMPSE OF THE ORGANIZATIONAL LANDSCAPE

Although the door is left cracked open, I hear a knock on the other side. A demonstration of this culture, that everyone seems somewhat distant and cautiously polite. “Come in,” I welcome the fist. “Hi, Rachel, how is it going?” At the same time I recognize the clinic’s male nurse case manager’s voice, I take note of his hip holster with message oil ready for action.

“Good morning. I’m just plugging away with writing up the report from my visit early this morning. What’s up?” As I speak, I make a conscious effort to pull myself away from my piles of paperwork strewn about the small counter at which I work. I imagine that when I am not occupying this room, this small nook otherwise holds nothing more than patient information sheets, maybe rehab instruments like a goniometer or ultrasound machine. Between this two and a half foot wide counter and the nearby treatment table, positioned on a diagonal to fit in this petite room, I sprawl out my hand-written observation notes, five to six ergonomic equipment catalogues, and a copy of digital photos I took during the patient evaluation I conducted earlier that morning. I lure myself out of my rhythm to make eye contact with him.

“Oh, I just wanted to let you know that they have massage appointments scheduled for me in here today at 11am, 1pm, and 3:30pm today. I thought you might like the heads up.” Having become accustomed to this routine, I am beyond the frustration of being interrupted constantly and feeling displaced. I am also aware that he is not in control of when massage appointments are scheduled and that we have both been put in this position to work things out. Never having committed to wearing a watch and

no clock afforded to this space, I dependently ask: “What time is it? I seem to have lost track.” Since taking this job two months ago, I’ve learned to use only as many evaluation materials as I can fit into two plastic crates, so that when someone needs to use this room, I can tote my items to another available space. I take advantage of spreading my materials out in the treatment room, as the alternate spaces are not as luxurious. “It’s 10:30am.”

“I appreciate you letting me know in enough time that I can be out of your way by 11am. Thanks.” I am not really appreciative; my emotions are dampened to a point of numbness, as if these daily interruptions have just become part of the routine of working here. I question what my existence means to this occupational health clinic and what comes to mind is a hunk of clay, moldable, easily adaptable. I ponder what others think of me: Rachel works here a few days a week, she is the new kid on the block, and we may need her to just clear out of the way when we need her to. Besides, we have limited space, what else should we do with her?

As I consider my place in this new position, I wonder if this is just the way I feel, or if seeking space and identity is an initiation experience all new employees must endure. Maybe this is the way new staff members are welcomed into this culture, like we are all pledging a sorority or fraternity? Having never participated in the sorority lifestyle myself, I toy with this concept in my mind. Because no one seems concerned about me playing leap frog from space to space, it seems this ineffective way of working is accepted at this clinic. Is this apparent blindness to poor productivity the status quo of working here in this outpatient clinic or a reflection of the larger culture of the hospital?

## My Initial Reality

I was hired as a “relief” occupational therapist in January of 2002 in order to conduct ergonomic evaluations for injured workers. The clinic that employed me is one department of a larger health system within the Rocky Mountain Region. The clinic provides medical services to injured workers from about 1,700 different companies in the area, serving as their worker’s compensation provider. As the most recent staff member, I joined a group of about 30 other health care staff members, including doctors, nurses, medical assistants, nurse case managers, physical and other occupational therapists, rehab assistants, and a business manager, all of whom report directly to the operations manager. Upon being hired, I was informed that the clinic had been recently divided when a second and smaller clinic was added in order to accommodate patients on the alternate end of town. Has this clinic become a divided culture within a larger one?

All other employees work between 32 to 40 hours, with full-time benefits available to those working 32 hours or more. Is there no incentive to work full-time? When I accepted the position two months earlier, I was informed I would have as many hours as they had work to offer me, which was determined by the number of ergonomic evaluations ordered by the doctors each week. Although my boss was not able to promise dedicated hours, I was able to tentatively plan on working about two days a week.

After driving a little over an hour from my home in a nearby Front Range community, I’d snag my orders from one of the tiny mail slots built into a wall behind a door made of glass. With my marching papers in hand, I’d hop back in my car to conduct a series of work place assessments. Sometimes I would head to a local organization in town, whereas other times I followed my Yahoo map, only to find myself almost the

entire way back to my home by the time I'd come upon another organization. After completing my assessment, I'd return back to the clinic to complete my documentation, and then get back in the car to make my 60-mile trek home. Most days I spent about five hours, or half of my work day, alone in my car. After positioning the built-in lumbar support to a comfortable position, I would click on my favorite channel and sing along to the oldies until my next human encounter. In their place of work, I'd practice my skills of establishing immediate rapport with whomever I consulted.

#### First Encounters

“Hello, I'm Rachel, an Occupational Therapist and Ergonomic Consultant here to collaborate with you on adapting your work practices to help you begin feeling better.” The purpose of my work was to draw connections between an employee's recent medical diagnosis and apparent risk factors associated with performing their job, those related to the pain or symptoms they were experiencing. For instance, a typical doctor's order would indicate an ergonomic evaluation as part an employee's treatment for elbow tendonitis. I would observe the interactions between employee behaviors, their environment, and equipment options. By observing these three domains, the goal was to first identify the factors which place the employee at great risk for having developed the elbow injury and then make recommendations to control for their risk factors (Letts, Rigby & Stewart, 2003).

I felt fortunate the Medical Director working with this clinic appreciated my role providing the ergonomic services. We seemed to share a common belief that if we could together determine the root of what was causing the injury, then the likelihood the employee would recover from the injury was much greater (HumanTech, 2004). The

employee's posture and body mechanics, distance at which the most frequently used items are maintained on top of the desk, or the type of keyboard used to type countless keystrokes represented simple examples from each of the employee, environment, and equipment domains. Typically, a variety of factors were present within each domain and all impacted the employee's injury (Cohen, Gjessing, Fine, Bernard, & McGlothlin, 1997).

### My Focus

I learned early on in my career the importance of making a connection with employees. I found this type of work a balancing act between meeting the needs of the employees, while trying to motivate them to take on a higher level of awareness and personal responsibility for improving their work performance (Watson & Wilson, 2003). Being able to gauge peoples' adaptability and willingness to make a change, a concept I refer to as hardiness, was often challenging. I felt most successful when I was able to first identify employees' degree of hardiness, then push them beyond their limits just enough that they learn new strategies for improving their performance without becoming overwhelmed (Zoltan, 1996). I believed striking a balance between allowing people to feel comfortable, yet expecting them to stretch out of their comfort zone by learning improved ways of performing their jobs, was impacted by whether they considered me a credible professional (Gilley, Boughton, & Maychunich, 1999).

If employees perceived me as credible, they might be willing to allow themselves to become aware of and be willing to entertain alternate, more safe and effective ways of working. The goal was not to try to convince them of exactly what they need to do differently, but to open their eyes to improved ways of performing, so they made the

choice themselves to change behaviors. I felt that my role was to provide some new information in a way the employees can get excited about, so they became motivated to make a personal change (Forer, 1996).

So what I find exciting about working as an Occupational Therapist and Ergonomic Consultant is the challenge of getting people to become intrinsically motivated and committed to improving their lives. I believe what sets a skilled professional apart from the rest is the ability to engage the employee and get them to share a role in decision-making, actively involved in the process of improving their own performance.

#### Shifting My Focus from Technical to Interpersonal Skills

Gilley and Gilley (2003) differentiate between two skill sets, aimed at improving one's credibility. They offer the visual of a bicycle: The back wheel symbolizes my professional talents, the front wheel is critical for convincing the employees I work with that change is needed in order to improve performance. In my work experiences, I enjoy practicing both these professional and interpersonal skill sets.

Having sound back wheel skills, however, is not what I have strived to set me apart from other professionals in my field. Besides, the ergonomic information I share is not remarkably dissimilar to the information other like consultants provide. What I find so fascinating are the interactions between myself and employees, employees' interactions with coworkers, group dynamics among coworkers, and the relationship between the smaller culture within the larger system. No matter how proficient I deliver technical information, providing sound ergonomics content information alone will not prove my credibility. I believe that good front wheel skills are the keys to tapping

employees' motivation and getting them to consider a change. As Lewin and Regine (2001) put it, all interactions impact one another in a web of complexity.

Much of my time consulting, both in my previous private practice and for this clinic, allows me to fine tune my professional or back wheel skills and further develop my interpersonal ones. I believe that I have generally been drawn to this type of work because I am fascinated with the dynamic of building relationships with people. I truly enjoyed connecting with people; however I became disappointed that I never learned how the lives of employees I interacted with may have been positively affected by our time together. Did they change their work habits? Were changes made to their environment? Did their organization provide the equipment options? Were employees successful advocating for their own needs? Did the organizations see the benefit of improving employee work performance? Did any of the collaborative time we shared make a difference?

#### Time for a Change

After two months working my new job, my interests were peaked about how the process of implementing ergonomic services for injured workers could improve. I believed that there must be a better way of providing ergonomic services, a way that would allow me to better contribute to the lives of the employees and to improve the effectiveness of conducting my job. Having conducted ergonomic evaluations since I finished graduate school, I had developed my technical, back wheel skills to a level of proficiency. While I liked the variety of working with various organizations, I had become dissatisfied with the solitary and transient existence of consulting. My interest in

working collaboratively with others seemed unfulfilled by my brief interactions that pertained to consulting.

I think on some level, I hoped by joining this clinic and the larger organization of almost 3,000, I would fulfill my social interests by becoming part of a network of people working in the context of an organizational culture. I wanted to be part of something bigger and more meaningful than just myself, wanted to explore interpersonal dynamics further, and have the challenge of putting my recommendations for improvement into action. Despite only being in my new position for a short time, I was ready for a bigger challenge, another set of learning experiences.

Sure, I had made a change from private consulting to working for this clinic. I was still working with injured employees to provide them an initial evaluation and possibly a follow-up visit. I had been accustomed to making my recommendations for improvement and washing my hands of the responsibility of following through to be sure that all of the recommendations were implemented. I believed that leaving the responsibility to the individual organization was simply not a good way to ensure that anything would come of the recommendations. I wondered what it would take to actually have to stick around and put my own recommendations for change into practice.

Based on my initial experiences working for this clinic, I recognize there were a variety of opportunities for improving the way in which I was working. For instance, I was expected to either type my reports or hand them off to one of the support staff for her to type them. Clearly they had not hired me for my typing skills! I was bored out of my mind in my sixth grade typing class and was not the least bit engaged by my teacher's

expectation of typing “jjj” and “fff” over and over again. And because our clinic was busy, it would often take several days for our own support staff to type them.

This slow turnaround time was seemingly accepted by the doctors. I had also been alerted that no one was exceeding their expectations with the timeframe it took to get them the feedback they required. I was told that after ordering an ergonomic evaluation, the physician often met with the patient for a follow-up visit prior to having the ergonomic recommendations for improvement in hand. In essence, ergonomic services were not viewed as a standard of care like I had been accustomed to with other medical practices employing an ergonomic consultant. It was becoming apparent to me these services were not considered as much a priority as I had expected.

It seemed odd to me that I was hired to provide a service that was seemingly important to this clinic, yet because of the process inefficiencies, the services were unable to be treated as one of the key means for returning an employee back to their previous functional level. In response, I decided I would make it my top priority to improve the process of providing these services, such that ergonomic assessments would become more integrated into patients’ care plans. I became intrigued with improving performance and knew that some of my earlier private consulting experiences would shed light on the apparent opportunities for improvement.

My passion for improving apparent inefficiencies lead me to gain acceptance from my boss to initiate a dictation process for documenting ergonomic evaluations as well as to develop an ergonomic assessment ordering process. In doing so, the amount of time and effort doctors spent writing orders became streamlined by standardizing a specialized script. A higher level of acceptance and interest on the part of the medical

provider was evidenced by a greater number of subsequent referrals. Accordingly, our clinic began conducting an increased number of ergonomic evaluations, thereby increasing the clinic's revenue. I too recognized the benefits of the clinic's referrals increasing, as I was able to consistently work three or four days a week, rather than the two I was tentatively offered upon hire.

On a very personal level, I craved a change. I believed that making some changes could improve the process for which the occupational health clinic had been providing ergonomic services, thus improving the functional lives of employees. I entertained the idea that by changing the process of providing these services, it would not only change me in the process, there also seemed to be potential to provide some positive changes for the larger organizational culture (Senge, Roberts, Ross, & Smith, 1994).

#### Why Conduct This Study?

The purpose of this study is to holistically describe my poignant experiences initiating a change process as a new leader within an organization. Based on my work experiences at a health system, this qualitative study raises the following initial research question:

- As an emerging leader within a healthcare organization, what are my experiences initiating a change process and what meanings do I derive from them?

By raising this question, I aim to depict a real life account of an organizational change process, as a learning opportunity for the reader and to further develop my sense of self.

#### Rationale

A vast number of texts and studies have examined the concepts of organizational culture, organizational change, and the role of the leader within organizational culture.

There are also large bodies of literature to support the role of the Occupational Therapists and Ergonomics Consultants. What does not exist is a first-hand account of an Occupational Therapist and Ergonomics Consultant, serving as a new leader within an organization who, is attempting to implement an organizational change process. Based on extensive literature review, I found no such previous research to have been conducted.

A second rationale for conducting this study is that the use of stories as an effective tool for change among organizations appears to be a newly emerging topic of discourse. Brown, Denning, Groh, and Prusak (2005) provide support for why narrative should be part of the mainstream of organizational and management thinking in their recent *Storytelling in Organization: Why Storytelling is Transforming 21<sup>st</sup> Century Organizations and Management*. This study also served to further promote the growing realm of autoethnography within the larger body of qualitative research.

#### Significance and Contribution

By pulling several bodies of knowledge together to conduct this study, I am hopeful it will, in turn, provide some contribution to these respective fields. As an Occupational Therapist, this study informs the management and administration sectors within the field. And as a consultant in the specialty area of Ergonomics, this study provides real life experiences of developing, implementing, and evaluating ergonomics services within a large health system. For those newly graduating from Occupational Therapy schools, this study provides a glimpse into the nature of an Ergonomics Consultant's work, including the political implications that are often not depicted within the classroom, as well as the highs and lows.

Next, this study informs the practice of organizational administration, as well as other new leaders setting out to implement change, as it portrays one person's experience with initiating an organizational change process. By depicting my personal narrative, I am hopeful that the reader finds my work to be of aesthetic value. Well written stories have a way of captivating the reader and bringing experiences to life for them. With the recent rise of stories within organizational culture, I am pleased to have this study further contribute to the state of this newly recognized method of creating and sharing knowledge.

## CHAPTER TWO

### MY LEARNING JOURNEY

One of the reasons I decided to pursue this study is because I believe that one of the only assurances in life is that things are constantly changing. For some people, hearing the word change makes them cringe. Most people I have encountered are either intimidated by change or want to avoid it. It seems change has a bad rap, associated with a huge dose of negativity, wherever it turns. And then there are people like me, who are drawn to change. Intrigued by the concept, I view change as a way to explore, be creative, express myself, and make some improvements.

This whole concept of change seems a bit ironic to me: If everything is always changing, why all of the resistance? Why not get a jumpstart on the whole process, finding and possibly improving ways of doing things, rather than always reacting to changes? I'm not sure about you, but I'd rather be actively involved in the process, rather than fight against it, or try to ignore what's happening to me. Attempting to create a balance with this thing called change, allows me to feel that I can better lead a productive and meaningful life for myself.

#### Context

Throughout the development, implementation, and on-going evaluation phases of providing preventive ergonomic services, I had been simultaneously taking graduate course work in the areas of Leadership Development, Human Resource Development, Program Development, Funding, and Evaluation, and Research Methodologies. My course selection has stemmed from my interest with learning how to best improve processes that relate to my interaction with fellow employees within the organization.

Accordingly, I have been able to apply my new learning experiences at work. In essence, the knowledge I have learned in the classroom has often become the next day's experimental application. Through this fluid learning process that combined both theory and practice, I have gained great insights about how to go about implementing performance improvement initiatives within an organization.

Because I made an effort to incorporate the theories and models I learned in my graduate courses into my work practices, my natural inclination of how to implement a change process has been impacted by the works of theorists and practitioners I studied. Of all of the models, one in particular captures all three of my areas of interest for this study: organizational culture, the change process, and the role of leadership. Accordingly, the model that most influenced my daily pursuits at work is Fullan's (2001) framework for leadership, which is depicted in his text entitled, *Leading in a Culture of Change*. In essence, I found myself trying to utilize Fullan's concepts as guiding principles for conducting my daily work. Because these principles were first introduced to me in my first graduate course on Leadership Development, I often referred to these principles during the course of my time spent at work during the past three and one-half years.

#### Leading in a Culture of Change

When serving as a leader within an organization, Fullan (2001) contended there are five components of effective leadership that mutually impact a leader's ability to foster change. These components are moral purpose, understanding change, relationships, knowledge building, and coherence making. While each is briefly summarized below, a greater amount of detail is provided on the change process component, as this is the focus of this study as well as the component for which Fullan provided the most comprehensive

information. Each component section begins with a salient quote, provides an overview of the component, and closes with a list of my most favorite quotes that pertain to the component. I have bulleted these quotes and consistently refer to them as guiding principles throughout this summary. An example of a guiding principle follows:

- Leadership is needed for problems that do not have easy answers (Fullan, 2001, p. 2).

At the end of this review, I also include a brief list of general guiding principles, which are not specific to any one component, but pertain more generally to all five. Each of the guiding principles provided small pieces of wisdom during my work experiences and, at times, the strength to remain focused on the change process.

#### Moral Purpose

To achieve moral purpose is to forge interaction-and even mutual purpose-across groups. Yet the problem is that people are not equal and the privileged have a vested interest in the status quo as long as it works in their favor” (Fullan, 2001, p. 25).

Simply stated, moral purpose means acting with the goal of making a positive impact on the lives of employees, customers, and overall society. In order to be effective in complex times, leaders must be guided by moral purpose if the hope to make a difference in the workplace. Fullan’s (2001) specific components of moral purpose that I immediately connected with, hoped to learn to enact in my daily work, and therefore viewed as guiding principles are as follows:

- “The litmus test of all leadership is whether it mobilizes people’s commitment to putting their energy into actions designed to improve things. It is individual commitment, but it is above all collective mobilization” (p. 9);
- “Moral purpose cannot just be stated, it must be accompanied by strategies for realizing it, and those strategies are the leadership actions that energize people to pursue a desired goal” (p. 19);

- “Although moral purpose is natural, it will flourish only if leaders cultivate it” (p. 27); and
- “Workers will increasingly demand more than a paycheck. They’ll want to know the higher calling or enabling purpose of their work” (p. 28).

### Understanding Change

Remember that a culture of change consists of great rapidity and nonlinearity on the one hand and equally great potential for creative breakthroughs on the other. The paradox is that transformation would not be possible without accompanying messiness” (Fullan, 2001, p. 31).

For leaders to be effective, we must be able to identify how people cope with change and coach them through the process. Not only will the process be more fluid if leaders effectively teach people how to best handle change, but the leaders will inevitably learn a great deal from the employees about themselves. By taking part in the change process, employees come to know the higher calling or enabling purpose of their work. Along with recognizing the importance of working collaboratively with others, a leader fostering change must also keep a pulse on the rate at which changes are introduced (Fullan, 2001).

### *The Goal is Not to Innovate the Most*

“The organization or leader who takes on the sheer most number of innovations is not the winner” (Fullan, 2001, p. 35). Rather than encouraging one innovation after the next, in turn lacking depth and coherence, effective leaders focus their energy on building relationships. In doing so, people feel more connected to an organization as they are encouraged to work together and pool each other’s resources, the organization tends to be more flexible in nature. Flexible organizations fare better in the light of change (Fullan, 2001).

On the contrary, a leader who is quick to implement a succession of changes or disregards employees' feedback may be unable to persuade others of the new direction. Another common challenge leaders face when seeking others' buy-in may be trying not to move too quickly with change initiatives. While developing a balance between the rate and depth change can be introduced, a leader must also be attentive to how to best introduce change (Fullan, 2001).

#### *It Is Not Enough to Have the Best Ideas*

While it is one thing to cultivate the best ideas, it is quite another to implement them successfully. One of the greatest sources of frustration is to watch people with great ideas entirely lack the ability to get anyone to buy into them. Claiming to be "dead right" and attempting to coerce others to jump on a bandwagon often creates overwhelming opposition. It is this "do what I tell you" style of leadership that often sets leaders back, to say nothing of the interpersonal problems that are created with coworkers and subordinates. No one is interested in hearing someone toot their horn about the great ideas that they have developed (Fullan, 2001).

Having great ideas of their own or using those of others may, in essence, get a leader absolutely nowhere. Having the skills to encourage others to be part of the process for cultivating and implementing great ideas is one of the keys to initiating change efforts.

#### *Appreciate the Implementation Dip*

Another key for understanding change is to appreciate when progress may slow during the implementation phase. Not only is fluctuation in the rate of implementation normal, it may give way to the best creativity. Fullan (2001) defined the implementation

dip “as literally a dip in performance and confidence as one encounters an innovation that requires new skills and new understandings” (p. 40). Being able to demonstrate the right kind of sensitivity toward the implementation dip allows the leader to remain supportive of the efforts of those most directly affected by the implementation of the change effort. This will in turn cultivate more creativity, building of relationships, and further success throughout the entire process.

Accordingly, leaders who demonstrate sensitivity fully understand that they are fostering an evolving process; one with many twists and turns, rather than a single event. It is important for leaders to recognize that, equal to if not greater than most other processes, change takes time. A leader must develop enough sensitivity to appreciate the implementation dip while balancing enough patience and persistence to effectively address issues with people who may resist the change process all the way. “Successful organizations and their leaders come to know and trust that these dynamics contain just about all the checks and balances needed to deal with those few hard-core resisters who make a career out of being against everything—who act, in other words, without moral purpose” (Fullan, 2001, p. 43).

#### *Redefine Resistance*

It is often easy to identify those people that are resisting change. They may be doing so for reasons that are more difficult to identify, however. It is important leaders not become defensive toward employees who are resisting the change. In doing so, the leader would only further encourage resistance and subsequent alienation. Rather, it is important for the leader to validate the resistance being expressed, either verbally or non-verbally. Not only does this effort portray that the leader is humane and has the ability to

be empathetic, but the leader may actually learn a great deal from those who resist change.

An employee who resists change may have ideas the leader has overlooked. In that instance, the leader has the opportunity to draw on this person's insight in making the change process even more effective. Because a change initiative, no matter how well thought out and no matter how great an opportunity, will only be successful if it is carried out in a manner that allows it to be successful.

Successful organizations don't go with only like-minded innovators; they deliberately build in differences. They don't mind when others--not just themselves--disturb the equilibrium. They also trust the learning process they set up--the focus on moral purpose, the attention to the change process, the building of relationships, the sharing of critical scrutiny of knowledge, the traversing the edge of chaos while seeking coherence (Fullan, 2001, p. 43).

No matter how closely tied moral purpose and relationship building are to the organizational change process, there will always be a few people who will resist change.

### *Reculturing is the Name of the Game*

The act of providing support for an employee, who has expressed a resistant viewpoint, may be a new step for many organizations. And it is this process of taking new steps, in a direction which fosters the change, which is referred to as reculturing. In other words, it gets at changing the way things are typically done within any given organization.

Effective leaders know that the hard work of reculturing is the sine qua non of progress. Furthermore, it is a particular kind of reculturing for which (an organization) strives: one that activates and deepens moral purpose through collaborative work cultures that respect differences and constantly build and test knowledge against measurable results--a culture within which one realizes that sometimes being off balance is a learning moment. Learning in a culture of change means creating a culture (not just a structure) of change. It does not mean adopting innovations; it does mean producing the capacity to seek, critically

assess, and selectively incorporate new ideas and practices-all the time, inside the organization as well as outside it (Fullan, 2001, p. 44).

With this concept of reculturing in mind, it is clear that leadership during any change process is not linear, but rather a complex undertaking.

### *Never a Checklist, Always Complexity*

Because leaders and members of an organization experience constant, frantic change, it is often important to “think out of the box.” This is often the best method of generating and prioritizing patterns of thinking, and in turn develops new knowledge for the organization. The ability to think about and handle the complex is greatly the result of the organization maintaining a flexible, relationship-based learning environment. Without a strong network of working relationships, people often feel hesitant to exchange the information necessary to develop and share knowledge (Fullan, 2001). Finding ways to foster creativity and ensure that employees feel safe making their ideas known is key.

The aspects of component that I revere as guiding principles are as follows:

- “The paradox is that transformation would not be possible without accompanying messiness” (p. 31);
- “The best way to ‘manage’ change is to allow for it to happen” (p. 33);
- “I was running so fast and making so many changes that I was getting tired. People around me were even more sick and tired” (p. 37); and
- “By supporting the like-minded, leaders trade off early smoothness for later grief. If you include and value naysayers, noise in the early stages will yield later, greater implementation” (p. 75).

### Relationships

Why should anyone be lead by you? Their answer is that we should be lead by those who inspire us by (1) selectively showing their weakness (revealing humanity and vulnerability), (2) relying on intuition (interpreting emergent data), (3) managing with tough empathy (caring intensely about employees and about the work they do), and

(4) revealing their differences (showing what is unique about themselves)” (Fullan, 2001, p. 55).

Most common across successful change initiatives and theorists depicting their concepts of the change process is the importance of building relationships. As Fullan (2001) puts it, “if relationships improve, things get better” (p. 5). He claims the role of the leader is to ensure that people within an organization develop relationships so they can collaboratively produce desirable results. To try to emulate them when conducting my daily activities, I frequently reminded myself of the following guiding principles:

- “When the individual soul is connected to the organization, people become connected to something deeper—the desire to contribute to a larger purpose, to feel they are a greater whole, a web of connection” (p. 52);
- “Effective leaders constantly foster purposeful interaction and problem solving, and are wary of easy consensus” (p. 5);
- “Leaders in a culture of change require a quality that all long-term effective leaders have—the capacity to resist a focus on short-term gains at the expense of deeper reform where gains are steady but not necessarily dramatic” (p. 63); and
- “Program coherence is organizational integration” (p. 64).

### Knowledge Building

Effective leaders understand the value and role of knowledge creation, they make it a priority and set about establishing and reinforcing habits of knowledge exchange among organizational members. To do this they must create many mechanisms for people to engage in this new behavior and to learn to value it. Control freaks need not apply: people need elbow room to uncover and sort out best ideas” (Fullan, 2001, p. 87).

The fourth component of providing effective leadership in a culture of change is building knowledge. Fullan (2001) explains that the process of turning information into knowledge is based on social interactions. These interactions will only happen effectively if good relationships exist among people. To be successful with building knowledge, leaders must allow people to feel at ease with sharing information by going out of their

way to create mechanisms for people to engage in these sorts of social behaviors. Only by creating these avenues for employees will these new behaviors of building knowledge become part of the organizational culture. People need to feel free to express themselves and be valued for doing so. And of the two guiding principles, the first one listed below speaks directly to those people who are uncomfortable with this free exchange of information and may make the building of knowledge difficult:

- “Control freaks need not apply: people need elbow room to uncover and sort out best ideas” (p. 87) and
- “Quality ideas must be retained, shared, and used throughout the organization” (p. 81).

#### Coherence Making

Change is a leader’s friend, but it has a split personality: it is nonlinear messiness that gets us into trouble. But the experience of this messiness is necessary in order to discover the hidden benefits-creative ideas and novel solutions are often generated when the status quo is disrupted (Fullan, 2001, p. 107).

Most leaders would agree that the world is complex. Along with this acceptance come the reality that there is sometimes a fine line between facilitating coherence and encouraging disturbance. For some of the most powerful coherence to be realized people often need to work through complexity and ambiguity of hard to solve problems. Although a leader must rely on judgment, there is a time to advocate for coherence and there is also a time to disrupt the equilibrium in hopes of getting back to making coherence.

- “Coherence making, which involves prioritizing and focusing, is greatly facilitated when guided by moral purpose” (p. 25) and
- “There is a time to disturb and a time to cohere” (p. 11).

The remainder of the principles I used in my work are more general in nature. They are provided below:

- “Energetic-enthusiastic-hopeful leaders “cause” greater moral purpose in themselves, bury themselves in change, naturally build relationships and knowledge, and seek coherence to consolidate moral purpose” (p. 7);
- “Their enthusiasm and confidence (not certainty) are, in a word, infectious, and they are infectiously effective, provided that they incorporate all five leadership capacities in their day-to-day behavior” (p. 7); and
- “The lesson: never be complacent...” (p. 54).

Recognizing that the concepts of leading a meaningful life and finding ways of working in a purposeful manner are deeply connected to my role of being an Occupational Therapist, I immediately remembered my first experiences with research. I was an Occupational Therapy graduate student attending college in Buffalo, New York. I was in the initial stages of planning to write my thesis.

#### Initial Impressions of Research

Because most of my Occupational Therapy courses had few students, I was surprised to find so many people piling into the first Research Methods class of the semester. Not sure what the whole concept of research was about, I was feeling less confident about my academic abilities and choose a seat in the back of the classroom, which was out of character for me. Because I stand only a few inches above five feet tall, I generally sought out seats in the front, enabling me to take in as much auditory and visual information as possible. My appetite for learning never seemed satiated.

This day, something is different. I keep my eyes glued to the floor as I walk, trying to prevent myself from tripping over backpack straps and water bottles monopolizing most of the ground. As I plop into a seat that seems far enough from the front of the room, I notice a tall, thin man take a prominent stance at the podium stationed front and center. He is totally bald and I am struck by the shininess of his head. When he

speaks, he sounds differently than I expect. I detect no foreign accent; however something seems out of place to me. I strain hard to listen to what he says, unable to make a judgment about whether the chill in the room or the idle chatting from the back row of students are aiding my distraction. The bald man, who I come to secretly refer to as the bald eagle in my head, covers a tremendous amount of information during this semester.

Like the rest of my classmates, I try my best to learn all of the rules, absorb all of the information for my methods tests, attempting to make sense of the concepts that seem so cumbersome to me. Whether these methods were the best choice for our research interests seemed to make no difference. Instructed to pick one of the research designs and start formulating hypotheses, I worked diligently. I controlled for bias, inputted all of the numerical data into an Excel spreadsheet, and handed my masterful work over to the department's primary researcher, the bald statistician. "How we are expected to write affects what we can write about... Knowledge is constituted as 'focused,' 'problem' (hypothesis) centered, 'linear,' straightforward. Other thoughts are extraneous" (Richardson, 1994, p. 927).

After the almighty significance tests were conducted, I spent months trying to make sense of the data. I envisioned the SPSS results were handed back to me on a disk, must have come from a laboratory in which everything was controlled and calculations were precise. I imagined small white mice scurrying around a spotless laboratory keeping themselves busy sniffing out random numbers as if they were bits of cheese. By the time of my defense, I'd memorized what to say, but had not developed the intense personal connection to my study that I had anticipated. Despite my lack of passion for quantitative

methodology, the statistician did instill in me the importance of conducting research to advance the state of general knowledge.

### Taking the Path Less Traveled

It wasn't until three years later that I became interested in pursuing another research study. I had been dabbling my efforts toward a variety of performance improvement initiatives, attempting to measure the effectiveness of services I had been providing for injured employees. Although I knew that running some SPSS analysis would prove most influential with my employer, I also included some open-ended questions to peek my curiosity in what people actually had to say when given the opportunity to provide their own words.

Based on the open-ended and often in-depth feedback that I received, I was drawn to further employ methods involving the use of surveys (Creswell, 1998). By analyzing my participants' open-ended responses, I became exceptionally interested in the brief stories people were telling. My curiosity about their stories lead me to design my first research study from other than the positivist perspective. All of the data collected were in the form of personal journals, created by each of the participants to document their body awareness, so that I was able to see if they transferred the learning to other aspects of their lives. With one of my feet planted in the traditional, positivistic paradigm constantly being scowled upon by my disinterest for controlling personal bias, and the other foot tip-toeing into a more interesting arena of research, I piloted my first mixed methods study (Leone, 2001).

## Finding my Place in the World of Research

When I began my doctoral studies, I took as many qualitative methods courses as possible. Immediately, I connected with the constructivist concepts, as this way of seeing the world resonated with me (Bogdan & Biklen, 1998; Yow, 1994). Each time I worked with an individual to improve their functioning at work, I had participated in the process of co-constructing reality. I relied on the employees' feedback as well as my observations to create my recommendations. Their willingness to make a change in the way they work depended, in part, on my ability to connect with them and gain their trust. Accordingly, the lens from which I view the world resonates with other constructivists who believe reality is a co-constructed process. And the qualitative research course I found most interesting was ethnography.

## Discovering Ethnography

Being exposed to the world of ethnography has been an eye opening experience. By describing people and writing about culture, this perspective of conducting qualitative research refers to both a process and written product (Richardson, 1994). This way of viewing the world, both naturally and holistically, resonates with me. Conducting fieldwork to gather cultural information seems to compliment my current work as an Occupational Therapist and Ergonomics Consultant. By reflecting on this natural fit, I discovered what seemed so out of place, or foreign to me, during my earlier quantitative research courses. It was not the bald eagle's accent after all, but a disconnect between the type of research that was originally instructed to me in that crowded classroom, and a type I would later discover to be a more personally meaningful method of inquiry.

As part of my work, I rely on observations within a setting to formulate meaning of what I have experienced. In essence, I have very similar goals to those of an ethnographer. Just as the researcher strives to engage the readers, presents new ideas, and leaves it to them to make sense of their experiences; I share information with clients, present ways they could go about making a change, then challenge them to make the change for themselves. Accordingly, I feel there is a great deal of overlap between how I naturally approach the world, and the concepts used by ethnographers to depict the culture they have chosen to explore. Richardson (1994) captured this concept well when she wrote “Qualitative research has to be read, not scanned; its meaning is in the reading” (p. 924).

Just as qualitative research has been classified under a variety of names (Creswell, 1998), the same is true for autoethnography. Similar and often interchangeable classifications for autoethnography have included: personal narrative (Personal Narratives Group, 1989), native ethnography (Ohnuki-Terney, 1984), complete member research (Adler & Adler, 1987), literary tales (Van Maanen, 1990), lived experience (Van Maanen, 1990), narrative ethnography (Abu Lughod, 1993), critical autobiography (Church, 1995), personal ethnography (Crawford, 1996), ethnic autobiography (Reed-Danahay, 1997) as well as a variety of others (Ellis & Bochner, 2000).

#### Definition and Purpose of Autoethnography

Autoethnography is an autobiographical genre of qualitative research in which the researcher depicts personal experiences situated within a larger cultural context. It displays:

...multiple layers of consciousness, connecting the personal to the cultural. Back and forth autoethnographers gaze, first through an ethnographic wide-angle lens,

focusing outward on social and cultural aspects of their personal experience; then, they look inward, exposing a vulnerable self (Ellis & Bochner, 2000, p. 739).

Personal experiences are shared as a means of bringing the author and readers together, and a means of providing the reader an opportunity to experience and reflect upon the researcher's lived experience. By sharing the experiences in an engaging manner, the researcher strives to evoke readers and take them on a journey of making connections between their own lives and the story being told.

Usually written in the first-person voice, autoethnographic texts appear in a variety of forms, such as short stories, poetry, fiction, novels, photographic essays, journals, fragmented and layered writing, and social science prose (Ellis & Bochner, 2000). No matter which form is adopted, a common characteristic of all autoethnographic studies is that they point to the researcher as the primary instrument. Specifically, these personal accounts contain contextual details, dialogue, emotion, and self-consciousness. These tools allow the author to convey an emotional account of one's experiences to the reader. "The more honed the researcher, the better the possibility of excellent research" (Richardson, 1994, pp. 925). The goal of this research endeavor is to produce a personal narrative written manuscript.

### History of Autoethnography

The roots of autoethnography are derived from autobiographical (personal narrative or life history) and anthropological (ethnography) canons of research. The ethnographic aspect stems from anthropology's characteristic style of studying one's own people. Autoethnography capitalizes on this anthropology roots, then turns the concepts of examining one's own people on itself, by incorporating the tenants of autobiographical works. Threading these two fields, Hayano (1989) is recognized for having first declared

autoethnography as a method that “possess the qualities of often permanent self-identification with a group and full internal membership, as recognized both by themselves and the people of whom they are a part” (p. 100). Making similar parallels, Strathern (1987) referred to autoethnography as “anthropology carried out in the social context which produced it” (p. 17). In 1995, Van Maanen identified autoethnographic researchers as natives who reveal their own group.

While some autoethnographers focus primarily on the culture under study, remaining more consistent with the tenants of anthropology, other researchers in the field choose to focus more on the researcher, or autobiographical aspects, as compared to the larger culture. Ellis and Bochner (2000) decipher between these areas of emphasis and then provide specific names for these types of autoethnographies:

Autoethnographers vary in their emphasis on the research process (graphy), on culture (ethos), and on self (auto)...Researchers disagree on the boundaries of each category and on the precise definitions of the types of autoethnography...Although reflective ethnographies primarily focus on a culture or subculture, authors use their own experiences in the culture reflexively to bend back on self and look for deeply at self-other interactions...In personal narratives, social scientists take on the dual identities of academic and personal selves to tell autobiographical stories about some aspect of their experience in daily life (p. 740).

Accordingly, authors pursuing personal narrative studies, like myself, contend that “our understanding of others can only proceed from within our own experience, and this experience involves our personalities and histories as much as our field research” (Jackson, 1989, p. 17). Similarly, others assert that autoethnography that is constructed by those that have direct access to a culture as an insider are able to produce much more authentic accounts of the culture than an autoethnographer considered to be an outsider (Lejeune, 1989). It seems the earlier role of the autoethnographer accounted for by

Brandes (1982) as “autobiographical subject,” is still being echoed fifteen years later when Reed-Danahay (1997) contends that “the life story has ethnographic interest” (p. 9).

### Ethnography that Makes an Impact

Having gained legitimacy during the 1970s, researchers are now free to decipher whether they prefer to emphasize the large culture or the researcher (self) as the primary focus of study. Whether conducting a reflexive ethnography or personal narrative, both styles of autoethnography share a shift in emphasis from participant observation to observation of participation.

Although some argue that those undertaking autoethnographic studies are exceptionally self-absorbed beings, the purpose of this methodology is not to only write the story for one's self, but to share a message with others going through a similar experience, as well as those trying to gain a greater understanding of the phenomena being explored. Others have questioned the level of difficulty in writing one's own story. Offering a rebuttal, Ellis and Bochner (2000) respond:

Oh, it's amazingly difficult. It's certainly not something that most people can do well. Most social scientists don't write well enough to carry it off. Or they're not sufficiently introspective about their feelings or motives, or the contradictions they experience. Ironically, many aren't observant enough of the world around them. The self-questioning autoethnography demands is extremely difficult. So is confronting things about yourself that are less than flattering... Then there's the vulnerability of revealing yourself, not being able to take back what you've written or having any control over how the readers interpret it. It's hard not to feel your life is being critiqued as well as your work... Of course there are rewards too—for example, you come to understand yourself in deeper ways. And with understanding yourself come understanding others. Autoethnography provides an avenue for doing something meaningful for yourself and the world (p. 738).

And because stories are the way that humans make sense of the world, Ellis contends they should be both a subject and a method of social science research. A personal narrative can be viewed as:

An 'experience of the experience' intended to inquire about its possible meanings and values in a way that rides the active currents of lived experience without fixing them once and for all. Understanding is not embedded in the experience as much as it is achieved through an ongoing and continuous experiencing of the experience (Ellis & Bochner, 1992, p. 98).

Depending on the researcher's choice to adhere to the more rigid, scientific approach or venture to take a more artistic approach will affect the process and product the study will produce. Advising novice autoethnographers, Ellis & Bochner, (2000), explain:

If you viewed your project as closer to art than science, then your goal would not be to portray the *facts* of what happened to you accurately, but instead to convey the *meaning* you attached to the experience. You'd want to tell a story that readers could enter and feel a part of. You'd write in a way to evoke readers to feel and think about your life, and their lives in relation to yours. You'd want them to experience the experience you're writing about (p. 751).

One of the most intriguing concepts of autoethnography is that a great deal of the setting takes place in the mind of the researcher. Essentially, the person conducting the study represents one type of "site," as the person represents the "auto" piece of the study. This is a unique aspect of autoethnography in that the site is a multi-faceted concept. Another level of the site involves the other participant(s) who the researcher finds as the focus while conducting the study. The site also includes the context in which the researcher and key participants are engaged (Ellis, 2004).

### My Ethnography

Because everyone is affected by change, whether they seek, become intimidated, or ignore it, taking a critical look at a personal change process may afford us greater understanding and appreciation of this inevitable phenomena. While a great deal of theoretical information exists about how to lead a change process, I think we would all agree that theory and practice seldom depict the same realities for all.

The theorist I have chosen to utilize for later comparison of my own experiences is Fullan (2001). He depicts a culture of change, where the pace of change increases more and more rapidly as society becomes more complex. He contends that as society becomes exceptionally complicated, leadership must become more sophisticated to keep up with the vast number and increasingly dynamic changes. In my own attempt to reflect on why I am drawn to change processes, the following explanation resonated with me: “Leaders in a culture of change value and almost enjoy the tensions inherent in addressing hard-to-solve problems, because that is where the greatest accomplishments lie” (p. 8).

## CHAPTER THREE

### THE AUTOETHNOGRAPHIC ROAD MAP

The question guiding this study calls for autoethnographic research methods. Although not all autoethnographers agree about which aspects of the methods warrant emphasis--the research process, the culture in which the study is embedded, or the self--this leaves the researcher with the choice of deciding which aspect is the primary focus of the study. In this case, I have focused on how my experiences gleaned from the larger culture changed me, as a means of maintaining the focus of this study on myself. As an employee working for my health system for the last three and one-half years, I have had direct access and been part of the organizational culture and established relationships with my co-workers.

#### Data Collection

Data for this study consisted of records that may contribute to my personal change story. Given this study is a personal narrative, it is paramount that the data set be comprised from mostly personal documents.

#### Personal Documents

During a more than three-year period from January 21, 2002 to June 16, 2005, I utilized a combined approach of participant observations and reflective journaling to build a personal data set that I refer to as my work log (Merriam, 2001). I maintained this log by jotting down specific events, conversations, and daily activities, as well as my related thoughts, frustrations, goals, and perceived successes. These data were recorded because I believed they illuminated some of my most poignant work experiences during this period of time. Recording these data helped me process my experiences, as well as

provide an opportunity to channel my frustrations and successes in a purposeful way.

These data begin with my first interactions with the massage therapist in my department.

In maintaining my journal, I utilized yellow legal paper because I tend to carry a note pad with me to meetings. By taking notes at meetings and jotting down my thoughts, I was able to document a number of events and conversations in real time. When appropriate, I would insert my thoughts or questions on the same sheet, so that I could refer back to them and continue my line of thinking at a later time. When interactions would have been compromised by extensive note taking, I would jot short notes and then retreat back to my personal work area or my home to record my experiences and thoughts.

As much as possible, I collected data at least once a week throughout this three and one-half year period. As to be expected, the amount of data collection ebbed and flowed, depending on what was happening at the time, time spent away from work while on vacation or attending conferences, as well as my ability to reflect upon the circumstances at the time. I avoided maintaining any information that pertained to documents or meetings the organization considered to be proprietary. Overall, I have tended to write more during times I perceived to be more stressful, challenging, or exciting to me. As Ellis and Bochner (2000) put it, “you may be too caught up in living it to write about it” (p. 751).

#### Data Analysis – Reflective Analysis

Data analysis took place through writing the report. The process of reflective analysis helped me to begin the narrative by relying on “intuition and personal judgment to analyze data rather than on technical procedures involving an explicit category

classification system” (Gall, Borg, & Gall, 1996). The reflective analysis begins with the researcher first focusing on the phenomena and then attempting to depict the phenomena under study. In my case, I conducted a combination of thematic analysis from field notes documented at the time (Emerson, Fretz, & Shaw, 1995) and emotional recall for data that were not documented in real time and were more emotionally intense than other experiences (Ellis & Bochner, 2000).

The process of emotional recall involves using imagery to place one’s self back in the situation, by paying close attention to physical details, events, thoughts, and dialogue. This technique allowed me to recall the events that took place and were typically much more laden with emotion than others. One of the benefits of using this method of collecting data, as compared to writing field notes immediately after they occur, is that at the time of the emotionally intense situation, it is often difficult to record and analyze the information well. By allowing some time to pass, the ability of the autoethnographer to avoid getting caught up only in the emotion often significantly lessens. The intended product is a clearer and more well thought out analysis of the data, as the researcher is able to get around the emotional situation, rather than remain stuck in it.

After utilizing reflective analysis to initiate report writing, I returned to my chronologically recorded field notes to determine which themes emerged. As some of the qualitative gurus in the field indicate, “The qualitative researcher uses inductive analysis, which means that categories, themes, and patterns come from the data. The categories that emerge from field notes, documents, and interviews are not imposed prior to the data collection” rather they emerge from reading and reading the data (Denzin & Lincoln, 2000, p. 389).

In order to add layers of meaning to the recorded data set, I continually asked myself: Which of my vast experiences as a new leader within this organization are the most important to include or retract? In making these decisions, I paid close attention to which of my personal experiences were most meaningful over the course of my three and one-half years - those that most contributed to my organizational learning experiences and my role as new leader within the larger culture. Of course, my personal connection to specific experiences surrounding emotional recall techniques may have outweighed other recorded experiences in the final report, given the heightened emotion surrounding them.

#### Data Coding

My goal was to enter and record the moment-to-moment, concrete details of my experiences with leading a change process. I have analyzed and presented these data in a series of chronological vignettes so that the reader is exposed to my most poignant experiences. The use of vignettes in narrative studies is intended to evoke responses from readers.

Above all, codes helped me organize the data into core themes so that I was sure that the themes would be represented within chosen vignettes. By moving back and forth between reading raw field notes and emotional recall, I have represented my emotionally laden experiences to the reader and myself. By threading my personal work log with the emotional recall technique, I have presented a detailed account of my experiences and the meaning that I have derived from those experiences.

#### Writing It Up – Timeframes and Considerations

My report writing took place between September 2006 through February 2007, once all of the raw data was collected. During this time, I analyzed the data following the

procedures outlined above to write my detailed personal narrative. What I have found is the stories that seemed most meaningful were the ones that were most difficult to experience.

Perhaps like you, I find them unsettling, even painful at times. But that's where the learning is. We lose our innocence and our lost innocence validates some good values. We gain tolerance and humility. Sometimes we're ashamed of how much we've excluded from our experience, tried not to see, hidden from. And we should be. We don't need to run from the fear or anxiety we feel. We need to learn from it." (Ellis & Bochner, 2000, p. 748).

It became apparent to me that one of the best ways to learn from my experiences was to write them up in the narrative form. I chose to represent these narrative pieces in the same chronological order in which they transpired. Accordingly, the first chapter portrays more of my initial experiences, as a continuation of my experiences sharing space with the massage therapist.

Chapters four through seven represent my experiences with developing, implementing, and evaluating the injury prevention program. These experiences take place over a time period of three and one-half years. My experiences take the shape of narrative pieces, or vignettes, and are intertwined with my reflections upon them, and meaning that I derived from having experienced them. The term vignette is used to represent the stories of my experiences. These experiences were taken directly from my data set, rather than fabricated. Details about the context of the environment are depicted to provide a broader perspective to the reader; however, this study focused on my personal experiences and derived meaning.

Because this study focused on my personal perceptions and efforts in making sense of the larger culture around me, my report represents a subjective perspective and may not reflect what others involved may have observed or would wish to be recorded.

Accordingly, names and proper nouns have been changed. In writing my report, I have maintained an honest and ethical approach to what I have chosen to record. Given my efforts of being forthright, I was only able to collect data on those aspects of the change process for which I was knowledgeable. In other words, there may have been additional information shared elsewhere within the organization that I was not privy to, or certainly some things were omitted because they were not brought to a level of consciousness for me to draw upon them. By depicting my experiences implementing change within my organization, I hope that both the reader and I can develop a deeper understanding of what it means to implement change. In doing so, Van Maanen (1995) assures researchers that there is an inescapable political edge to the critical tale that must be considered.

The stories we write put us in conversations with ourselves as well as with our readers. In conversation with ourselves, we expose our vulnerabilities, conflicts, choices, and values. We take measure of our uncertainties, our mixed emotions, and the multiple layers of our experience. Our accounts seek to express the complexities and difficulties of coping and feeling resolved, showing how we changed over time as we struggled to make sense of our experience (Ellis & Bochner, 2000, pg. 748).

#### Ensuring the Goodness of My Ethnography

As a means of maximizing the quality of this research endeavor, standards of rigor were employed. These included length of time, seeking verisimilitude, and addressing the concepts of reliability and generalizability.

#### Time

One of the first ways to ensure the study upholds a high level of rigor is to spend a great deal of time in a cultural setting. Accordingly, participant observations were conducted over a three and one-half year period, from January 2002 through June 2005. During the first year, the researcher was on site for approximately 8 hours a day, 3 days a

week. In the later two and one-half years, I had access to the organizational culture for approximately 10 hours a day, 5 days a week. By spending a large amount of time in the field, genuine behaviors are revealed and the concept of “honeymoon effect” was outlasted (Glesne & Peshkin, 1992). It is presumed that members of the organizational culture under study developed typical behavior patterns with me as researcher, or in this case, new leader.

### Seeking Verisimilitude

Moving away from the traditional, one-dimensional concept that quantitative researchers refer to as validity, and different from the traditional qualitative concept of triangulation, autoethnography strives to seek verisimilitude. This is the ability to evoke the reader to perceive the experiences as lifelike, possible, and believable. The constructivist conducting autoethnography recognizes that there are many more than just three sides from which the world can be examined. Rejecting the two dimensional triangle for establishing validity, constructivist offer the crystal.

Crystals grow, change, alter, but are not amorphous. Crystals are prisms that reflect and refract within themselves, creating different colors, patterns, and arrays, casting off in different directions. What we see depends on our angle of repose...crystallization provides us with a deepened, complex, thoroughly partial, understanding of the topic (Richardson, 1994, pp. 934).

The personal work log constituted the primary data set, which was then supported by the use of the emotional recall technique. The written data source was read repeatedly during the data analysis phase, and emotional recall was utilized to build the level of complexity and richness into the data. The documents accumulated in their entirety were voluminous. As core themes emerged from the data, decisions were made as what constituted a theme and what fell outside of those themes.

## Addressing Reliability and Generalizability

In providing a holistic account, “the narrative rises or falls on its capacity to provoke readers to broaden their horizons, reflect critically on their own experience, enter empathetically into worlds of experience different from their own, and actively engage in dialogue” in regard to the perspectives presented (Ellis & Bochner, 2000, p. 748).

Because personal narratives are always created from a “situated location...there’s no such thing as orthodox reliability in autoethnographic research. The generalizability of a personal narrative is continuously being judged by the reader. As they determine if the story speaks to them about their experiences or the experiences of others in their life, they determine the usefulness of the story. As such, this study depicts my experiences learning and reflecting about my experiences with the change process.

Readers are put in the position of experiencing an experience that can reveal to them not only how it was for us but how it could be or once was for them. They are made aware of similarities and differences between their worlds and ours. It becomes possible for them to see the other in themselves or themselves in the other among other possibilities (Ellis & Bochner, 1992, p. 98).

Being able to effectively observe one’s one participation within a larger culture, so that the reader can experience what the researcher has, is the sign of a successful autoethnography. Being able to convey one’s story with honesty, emotional reliability, and the “capacity to inspire conversation from the point of view of the readers” are important aspects (Ellis & Bochner, 2000, p. 748).

## Putting Plans into Action

Because I perceive myself to be more of a proponent than most of this concept of change, I spent time reflecting about why I am so fascinated with the change process. Why am I drawn to the concepts and messiness of change to which so many others are

either resistant or ambivalent? What do I find so intriguing about the complexity? How does my background of being an Occupational Therapist and Ergonomics Consultant play into my curiosity? Why am I never satisfied with the status quo? Why do I find the “this is the way we have always done it” and “this is the way it needs to be done” attitudes so disconcerting? How do I actively work against these attitudes without being brash? What have others with similar questions and interests have to say about these things?

These are the types of questions I pondered and documented in my personal work log based on my experiences throughout the past three years. I believe that having always kept a personal journal growing up lead me, in part, to having become inclined to do the same at work. I have found that the times I generally choose to write are when my emotions are heightened. I could be so enthusiastic about something that I just have to write it down, as a way of celebrating with myself. Other times, I am so frustrated that writing seemed one of the most effective ways of handing my feelings. This range of emotionality has provided a rich source of data. By capturing these data and filling in some of the gaps with emotional recall, I am eager to learn and reflect on my experiences implementing organizational change.

## CHAPTER FOUR

### UNDERSTANDING CHANGE

*“Remember that a culture of change consists of great rapidity and nonlinearity on the one hand and equally great potential for creative breakthroughs on the other. The paradox is that transformation would not be possible without accompanying messiness”*  
(Fullan, 2001, p. 31).

Nothing portrays a clearer illustration of the change process than the evolving ergonomic program. M. Maddox (personal communication, November 21, 2002) provides the context:

The ergonomics program is a service offered to the organizations’ employees. The services have been provided by Employee Health Services for the last two years, when it originated, and has been referred to as the Ergonomic Redesign Program. Like the program title portrays, the services were focused on redesigning employees’ physical work environments, in response to injury. Recently, the program has undergone some extensive changes that include new leadership, an increase in the population being served, and the call for on-going evaluation and performance improvement. These changes have all culminated as a result of strong assessment skills; desire to focus on prevention, and a solid, well thought-out program proposal.

Having begun work for this organization in January 2001, I presented the program proposal to the Senior Management Group in August that same year. To prepare the proposal, I conducted an intensive review of literature review, employee and management interviews, as well as reading about how to best present a proposal for a new program. I had never written a program proposal before, so I worked fast to learn all I could from books and others with much more experience than myself. As a result, I drafted a comprehensive, 40-page proposal and two-page executive summary.

Along the way, I kept my manager apprised of my learning from the literature and from others. She was very supportive of my vision of providing preventative ergonomic services, and allowed me to work independently along the way. Her willingness to grant

me a great deal of autonomy suited me well, preferring to work more independently. As a result of the work I completed, in collaboration with my manager, I presented the following executive summary, as depicted below.

### Proactive Ergonomic Program Proposal

The national cost of work-related injuries and claims, \$171 billion annually, restricts the profitability, productivity, and effectiveness of organizations. This organization is no exception. These subsequent decreases in employee productivity and satisfaction, which add to the substantial loss of revenue, prove detrimental to the enjoyment of our organization's working environment.

To reduce costs and improve the culture of the working environment, leaders within the health care industry have designed and implemented highly effective, preventative ergonomic programs. The key to success within these organizations is management endorsement and financial support. Organizations that have adhered to preventative ergonomic interventions have reported significant decreases in Workers Compensation claims and lost days. Thorough data analysis has been conducted, based on the WC costs spent by our organization from 1/01/00 – 3/31/02 and the lost and restricted days reported within the Occupational Safety and Health Administration logs. The following summary statements are based on the data reviewed:

- 2/3rds of the cost of claims is preventable;
- Claims related to cumulative trauma disorders (CTDs) account for more than 2.5 times as many claims and associated costs, compared to either type of claims resulting from back injuries;
- There are almost 2 times as many CTD claims as there are back claims, specifically associated with patient caregivers;
- The average cost per CTD claim is 33% higher than back claims, specifically associated with patient caregivers;

- While 69% of the total cost incurred by claims is preventable, 80% of the total days lost could be eliminated;
- Lost days associated with total back injuries (patient caregivers and manual handlers) account for less than 1/3 of total days lost;
- 69% of the cost incurred by claims are preventable and 78% of the total days restricted could be eliminated; and
- There are approximately 2 times as many days restricted for CTD claims than for total back claims.

Through the implementation of a preventative ergonomic program, savings will be substantial, as 69% of this organization's work-related claims are preventable, through such a program. By focusing on the prevention of injuries, the number one strategic goal of our organization, to improve the working environment, will be positively impacted.

The specific program proposed is entitled the "Proactive Ergonomic Program" (PEP). The PEP vision focuses primarily on the enhancement of the well being of internal customers, the employees, by providing a higher standard of care through continuous quality improvement. With these efforts directed toward internal customers, a higher standard of care to external customers may also be positively impacted.

Positively impacting both internal and external customers, through the implementation of the PEP, is the challenge presented. To meet this challenge, there are two key requisites: Management endorsement and appropriate resource allocation. With management and financial support in place, the proposed PEP goals are as follows:

- To reduce the cost of work-related injuries and claims, those that can be affected by ergonomic interventions;
- To increase the productivity of employees, thereby decreasing related costs; and
- To improve the satisfaction of employees, those serviced by the PEP.

To evaluate the goals, both quantitative and qualitative measures will be administered. Evaluative measures will include stakeholders and will be ongoing. The PEP outcomes will be communicated to internal customers involved in this cultural

change. To successfully implement the proposed PEP, new resources will need to be dedicated and existing budgets reallocated. By reallocating portions of current budgets into the PEP, a higher standard of care through continuous quality improvement and cost containment will result.

### Call for Support

As a section of the manuscript, I provided about a dozen letters of support from employees that had been injured, management, and co-workers of mine from the outpatient therapy clinic for which we worked. Each of the letters reflected different benefits that a preventative ergonomics program would provide to the organization. Some focused on the benefit the program would have for them personally, while others forecasted the positive impact it would have on larger scale projects that were already in the process of being implemented by the organization at large.

### Test of Change

The proposal also depicted the results of a pilot study I had conducted with the Purchasing Department, as a means of substantiating the needs of “health employees.” The pilot study focused on determining the level of comfort of the eight employees, whom duties predominantly involved upper extremity type tasks at computer terminals. Participants included in this pilot study had not formally reported discomfort or other problems associated with their workstations during the 6-months prior.

### Methods

Each of the participants of the pilot study completed comfort level surveys prior to participating in a 30-minute ergonomic, educational in-service. The in-service was provided to two groups; each group had four participants. The format included an

interactive demonstration of the function of their individual chairs, strategies to ensure proper body mechanics, and preventative stretching techniques. An optional 15-minute, follow-up, “mini-checkout,” to address specific workstation issues, was offered. 100% of participants scheduled a “mini-checkout,” which was performed one week after the group in-service sessions.

During the “mini-checkout,” it was evident that the majority of the participants had applied the knowledge they had learned during the in-service, the week prior. Each of the participants had the opportunity to ask questions, have questions addressed, and receive further education and assistance to meet their individual needs. I provided recommendations that generally addressed worker habits, changes to the physical environment and/or equipment layout, and individualized adaptations for equipment use.

One week following the “mini-checkouts,” a post-survey was administered. This survey focused on levels of comfort, productivity, satisfaction, as well as current injury-reporting policies. Additionally, these employees were asked to share their opinions on the utilization of a potential ergonomics preventative program.

#### Quantitative Outcomes from the Pilot Study

Through collaboration and statistical analysis by the Clinical Researcher within the Education Department, it was possible to generate summary statements. As a result of having participated in the pilot study:

- 7 of 8 participants reported being more satisfied with the use of their individual workstations;
- 5 of 8 participants reported that they felt more efficient in their duties;
- 6 of 8 reported doing preventative stretching exercises;
- All participants reported that they would utilize an ergonomics preventative program if implemented;

- The comparison of pre-intervention discomfort scores with post-intervention discomfort scores demonstrated that this intervention had a positive impact on the reduction of discomfort;
- 4 of 8 reported that they were able to sit moderately or significantly longer than prior to their participation in the pilot study;
- Of the 4 components of the educational in-service, participants reported that all 4 were beneficial; and
- Participants reported that the interactive chair instruction and individualized work station “mini-checkout” were most beneficial.

### Qualitative Outcomes from the Pilot Study

Questions, which focused on current injury-reporting policies and level of utilization of the proposed ergonomics preventative program, warranted open-ended responses. General themes resulted from open-ended questions. These themes are presented in the form of employees’ quotes, and several examples include:

- “I am aware that there are quite a few employees that are experiencing daily discomfort and not reporting it to Employee Health.”
- “If employees are uncomfortable they mention it to other employees, friends, their doctor, or maybe their Supervisor. I know some employees that have decided to keep quiet because they have seen no results with other employees complaining.”
- “I have not reported my pain over the last few years because I am afraid of the work comp system!”
- “An ergonomic preventative program would help teach people how to make their work areas function for them.”
- “An ergonomic preventative program would be beneficial if it included information similar to what you presented to us, but in more depth. If employees are able to realize what problems can occur, and how they occur, they will better be able to report them before they become significant problems.”

The positive benefits that resulted from the pilot study, in conjunction with the letters of support, were positive attributes of the program proposal.

### Program Acceptance

Based on a great deal of support and much hard work, the program proposal was accepted by the Senior Management Group in September of 2001. I was eager to begin implementing all of the activities I had listed out in my proposal. For it wasn’t so much

that I just wrote those things in my proposal, I felt passionate about them! I think the piece I had included in the proposal from the American Hospital Association (2001) spoke to me most powerfully:

When examining ergonomics in the workplace, hospitals are unlike any other type of employer. We are probably more labor intensive than any other industry, and we expend most of our financial resources on ‘human capital’ – our health care workers who are the backbone of our facilities. We don’t manufacture widgets, perform ‘assembly line’ work, or move packages from point A to point B, like other employers. Our purpose is to improve the health and well being of people. We must be ready to help all who walk through our doors, regardless of their weight, physical or mental condition. In order to provide the appropriate care to our patients while ensuring the health and well being of health care workers, health systems adhere to ergonomic methods, a key employee priority. Critical to ensuring ergonomic safety is employee education. Ongoing body mechanic training, such as the proper methods to lift and move patients and correct body posture for computer terminal use, is the step hospitals take to prevent ergonomic injuries (p. 1).

I was all about creating a sense of urgency and I had fully acknowledged the need to do well by employees.

### Unexpected Challenges

But to my dismay, it would be six months before I would actually be awarded the position of leading the program. Before this would come to be, I would write the job description for the position and then proceed to interview for the position, along with 5 alternate candidates. This was a long and grueling process and one that I did not anticipate. I thought that because I developed the vision, conducted the research, and wrote and presented the proposal, that I would be granted the ability to get started with putting things in motion. Not so fast!

Another surprise was the work I had ahead of me with Carmen, the coordinator of the old Ergonomic Redesign Program. Despite the fact that a decision had been made that the new Proactive Ergonomic Program would replace the original Ergonomic Redesign

Program, there was a great deal of work ahead with making this a reality. And I was really in store for how challenging Carmen would be for me to work with, given her disinterest in seeing this change enacted. Maintaining the status quo was definitely in Carmen's best interest and this on-going effort to change the program, title, role, and responsibilities lasted for the next 8 long months. During this process I learned a great deal, most of which I hoped never to encounter again! And I certainly learned some good lessons in how not to treat others as I had been treated.

#### My Ally, My Adversary

Frankly, Carmen was not concerned with the feedback of others. She seldom elicited feedback and claimed that her extensive experience in the field allowed her to make independent decisions. One day when I was sharing an idea during a meeting with her and several others, she challenged my thought process. Although her approach was rather rough around the edges, her interest in seeking a better understanding seemed reasonable to me. I explained my rationale and could tell that the other folks in the room were supportive of the idea.

Feeling threatened, Carmen began raising her voice with me and speaking in a hurried tone. She asked: "How do you know if that will work? Have you ever tried that with someone before?" I explained that I had used this technique in the past and it seemed to work well with injured employees and that I would like to try it in a more preventative manner. Despite my effort to decrease the volume, tone, and rate of my speech, in hopes that it would help her stay calm, this did not have the positive effect I hoped it would with Carmen.

I remembered my experiences working with incarcerated adolescents and adults with various mental health diagnoses. This technique was one I often used to deescalate them from becoming more aggressive and out of control. Unaffected by my behavioral technique, she retorted back:

What would you know anyways, Rachel?! I mean, how long have you been practicing as an Occupational Therapist anyways?! I have twenty-five years experience as a nurse and I know what it is that I am talking about! My experience in the field is what allows me to make the decisions I make, and that is how I have come to know that the ideas I have are the right ones to consider. So, on what basis are you making your decisions if you have relatively little work experience?! I mean, how long have you really been practicing anyways?! You couldn't have gotten your bachelors degree more than, what, 2 years ago?!

My frustration was growing and my heart rate was speeding up inside of me. I immediately thought of the large man of a boy from a previous job. He was a troubled adolescent, locked up in a secure, residential boys program for being committed on breaking and entering charges. Unlike many of the others, he and I never connected well. He didn't like attending therapeutic groups and facilitating them was my primary role at the facility.

I was in the milieu one day when Alex became upset about not wanting to go to a group. He became verbally abusive and before I knew it a chair was flying in my direction. I jumped out of the way, feeling pretty vulnerable compared to this giant aggressor. Alex stood over 6 feet tall and was a rather stocky guy. He was looking for attention and it was sometimes challenging to try to not respond with fear, or any other way, which reinforced his efforts to intimidate staff. It took some finesse to provide him the attention he needed in a constructive way.

Pulling myself back into my current reality, which really did not feel all that different from my prior experience with being verbally assaulted, I reminded myself not

to get caught up and join Carmen by escalating with her emotionally. I calmly responded “I didn’t intend to question your experience in the field, rather provide an alternate idea for how we might make some progress with this employee’s comfort level. Do you want to continue our conversation now or pick up from here next week?” Carmen slammed her 4-inch binder closed, commented that she needed feedback from me on this or that by the end of the week, and left the room.

While this situation does stand out by nature of the age discrimination I felt I had experienced during the encounter, these sorts of eruptions from Carman were not uncommon. I became uncomfortable in her presence. I was able to remain calm with my verbal response, however, I felt really worked up inside. Several months into this transition of ergonomic programs, I just got to a point where I really hated being around her.

#### Our Mutual Adversary

Rather than allowing the group sessions to serve as a learning opportunity, Carmen demonstrated a lack of professional respect toward my recommendations in front of the other group members. I perceived her to be dishonest, passive aggressive, threatened, laden with hidden agendas, manipulative yet sophisticated, and clearly not a team player.

Group concerns and opportunities for creativity were consistently stunted, if not entirely rejected. Not only were we providing a less than desirable service to our customers, each of the members responsible for supporting these services were experiencing high levels of frustration. It came to no surprise that both the employees

working under Carmen's supervision sought out alternate job positions within the organization.

What was even worse was watching Carmen take full responsibility for ideas, giving no credit to those who had worked diligently to develop them. On one occasion, I was attending a meeting with Carmen, her boss, Fran, Fran's boss, the Safety Coordinator, and a graduate student who was interning with me for the semester. This meeting was one of the larger group transition meetings, intended to bring some closure to issues around ergonomic program documentation, in which we were all involved to varying degrees.

Our latest project was the development of a triage form, intended to determine what type of ergonomic services an employee should receive. If they were injured, they would follow the worker's compensation path, which Carmen would continue to coordinate. If they were seeking preventative services, they fell under the purview of the Proactive Ergonomics Program, which I was coordinating in the interim until the position would be formally filled (I had yet to be interviewed for the position).

The employees who fell somewhere in between a purely preventative case, and those of a formal workers' compensation injury case, were up in the air. It was the work of this group to sort out who did what with providing services for employees referred for our services.

### Picking My Battles

During one such meeting, Carmen prepared to read a portion of a letter she received from our self-insured worker's compensation adjustment company. She told us she had been in contact with the company's representative, to run a few things past her

during the ergonomic transition process. The way she presented the context for this letter perked my attention. Just by the way she was talking; I could tell something was up.

She was being too nice and seemed phony to me. Maybe this was how Carmen acted in front of her boss? She read the beginning of the letter aloud. Too preoccupied with listening intently, I dismissed my frustration with the fact that she did not have the courtesy of passing a copy of the letter out to everyone so we could read along with her. Typical! This lady thrived on the “knowledge is power” concept at work. While I was annoyed with her whole power trip approach to sharing this information with us, I had to admit that she was commanding my full attention.

I enjoyed talking with you on the phone recently, and was much impressed with our discussion about your efforts to control work related injuries. As we discussed, many of them are indeed preventable. Focusing on prevention is the direction in which most hospital employee safety and health programs need to be moving and you should be commended for your vision of becoming an injury-free organization. Your time, energy, and openness to moving your efforts in a more proactive direction are to be applauded.

And in that moment, I was furious. YOUR efforts, YOU should be commended, YOUR time, effort and of all things—OPENNESS! You have got to be kidding!!! This woman was taking full credit for the hundreds of hours that I had put into developing the program proposal right in front of others and me. Has she no shame?! There was no mention of the Proactive Ergonomic Program in a formal sense, or me! There was no room for being hurt by this tactic; I was simply pissed!

#### Coping in the Face of the Battle

As she proceeded to share the remainder of the letter, my mind had tuned off. I was busy thinking back on all of the comments Carmen had made during countless meetings exhibiting her preoccupation with maintaining the status quo. It was often

common to hear her explain that “our goal was not to reinvent the wheel,” rather to just get the day-to-day business accomplished.

On one occasion, she explained that she was not interesting in making the process better for the future clients, rather focusing on figuring out what the problems were with the situation at hand. This same “let’s not reinvent the wheel” lady was sitting in a room full of our immediate leaders, taking full responsibility for the idea of preventing injuries, meanwhile she resisted me every step of the way with putting the program together.

By this time, my mind is running wild. I am furious and feel my heart pumping hard. I turn to my graduate student, place the back of my wrist below the table and within her reach, and request “take my pulse.” Just as she gets the first few seconds into her count, I feel my heart banging in my chest. Dear god! I am having heart palpitations! I am not surprised when she whispers back “132.” I have got to do something before I literally explode. I take a few deep breaths and my heart feels smaller in my chest. After a few more and I think I may be able to actually speak in a normal tone.

#### Gaining Composure

And before I say anything, I have already convinced myself that I just have to let this one go. There is no benefit to expressing frustration about my not being recognized. Or if there is, I do not know what to say to adequately express myself and not create negative attention. I am too close to being able to get the Proactive Ergonomics Program separated from Carmen that I just have to bit my tongue. I jot a note on the pad of my paper, which reads: “Never take credit for someone else’s work! Be better than that...” Once I have my thoughts together, I picked back up with the conversation and contributed my feedback as appropriate.

## Keeping Our Distance

Around the same time period as this meeting, I began noticing that Carmen was either not responding to my emails or taking an inordinate amount of time to get back to me. In doing so, we were not communicating at a rate to keep up with the demand of our customers. Employees were not receiving ergonomic services and the equipment they needed in a timely fashion. Basically, our inability to communicate effectively was negatively affecting the people we aimed to serve.

I regularly kept my boss abreast of the challenge I was facing while working with Carmen. She always encouraged me and explained that I was doing the best I could under the circumstances of working with someone whom was really difficult. On one occasion, I came to her, pointedly asking if there was anything she thought I needed to be doing differently, clearly at the end of my rope with what else to try. She confirmed that I was doing a good job trying to meet the needs of the employees while working the best I could with Carmen. Despite the anguish I felt working with this woman; I was pleased to have the support of my boss, Fran.

## Ready, Set, Charge!

The inability to meet the needs of the employees we were supposed to be serving was not something I could leave alone. I requested a meeting with Carman, Fran, Carman's boss, and myself. While I knew that the confrontation would not be comfortable, I felt that we just needed to meet and deal with the issues. My meeting request was honored and the four of us planned to meet with the goal of establishing "prompt, professional, and open communication." I appreciated the receptiveness that Carman's boss, Tammy, extended me in granting the meeting.

## Confronting the Issues

The meeting was focused on identification of concerns that were impeding the attainment of the goal: “prompt, professional, and open communication.” Concerns documented during the meeting included:

1. Lack of response to emails;
2. Delay in response to emails, up to 6-8 weeks; and
3. Lack of professionalism.

We defined the expectations (prompt, professional, and open) and listed actions we each could take to help attain the goal. As we reviewed them I tried to focus on what I was doing to contribute to this mess with Carmen.

I had been consistently responding to her emails and doing so within a timely manner. So, I didn't think that concern involved me, just Carmen. The professionalism concern was less concrete and while I was sure I played some part, I could not think of anything that I had done that would be considered unprofessional. In my mind, the concerns were mine and mostly directed at Carmen. She was really a difficult person and I just needed to figure out how to deal with her better.

## In the Face of Conflict

As expected, this meeting was not comfortable for anyone attending, especially Carmen. Just as we were finalizing our list of action items, she explained that she was receiving a message on her pager and told us she needed to leave the meeting. I felt that she was just trying to get out of this uncomfortable situation and wondered if others had the same impression.

After telling us all she needed to leave, Carmen actually had the audacity to stand there for about another five minutes and talk about something she felt was important.

Once she finished, Tammy told her that we would need to address her matter next time because she obviously needed to get going in response to her page. I wondered if she ever actually received a page, noting that it did not let off any audible beeping or vibration noise. In response to her boss' redirection, Carmen explained that she didn't think that we needed to continue to meet or that if we needed to do so; she would rather meet with an Employee Assistance Program representative.

Tammy opened this idea up to the rest of us for feedback and both Fran and I expressed that we thought we should meet together as a group one more time for some resolution. Again, I was pleased that Fran and I were on the same page and that I had her support. It was agreed that we would meet again as the same group. Tammy told Carmen that because she was not going to be available for the remainder of the meeting to decide on a future time and plan, she would just let her know what the plan was after the meeting was completed. Tammy did not let her off the hook and I was happy for that!

#### The Release

Carmen, already standing, abruptly grabbed her things from the table and left the room without uttering another word. Tammy got up from her seat and closed the door behind her. As I heard the door close, I dropped my head as if I could not hold the weight of it up any longer. On her way back to the table, Tammy paused for a moment and placed her hand on my shoulder. In response to her compassionate gesture, tears began rolling down my face...I was overcome with the feelings of relief and on-going frustration simultaneously. Tammy commented that this "must be the worst thing you have to deal with in your life right now."

I explained that it had been a very difficult year working with Carmen and that my request for meeting was an attempt to get the communication running a bit more smoothly. I expressed that I knew it was not easy for anyone in the room and thanked them for their willingness to meet. I was smiling and crying at the same time.

I think Tammy understood for the first time how hard it had been for me to work with Carmen. I talked about how awful it was to be subjected to age discrimination and disrespect, unreported by me in my attempt to get the program going. I shared my mixed feelings with not having reported the various instances where the communication was threatening. I apologized for getting upset, explaining it was so emotionally draining to deal with the dysfunction and lack of professionalism!

Tammy assured me that I did not need to apologize and that I did a great job of not getting sucked into “the memory lane” stories. She acknowledged that she did not believe I was at fault for the poor communication and hoped that by meeting as a group, Carmen would come on board with responding to my emails in a timely fashion. She encouraged me to “stick in there” and things were likely to improve in the near future.

#### A Different Kind of Resolution

Although I would have preferred not to become outwardly emotional, it felt good to really share what the experience had been like for me. Awful! I felt good that the two of them recognized how trying, yet successful, it had been working with Carmen. All and all: I felt that we were making progress and I was exceptionally drained! What a process this is...I sure did ask for a good learning experience and boy am I getting one!

Three weeks came and went and no follow-up meeting was scheduled, as we had planned. I inquired with Fran if the plans had changed and she simply told me that “there

may not be a need for further meetings. I will let you know when I know more.” About two months after we met, Carmen resigned her position. The four of us never did meet again.

Through a great deal of risk taking and persistence, the Proactive Ergonomic Program replaced the Ergonomic Redesign Program. For this to have occurred, it was important to have established some tremendously supportive, working relationships. As anyone who has attempted to initiate a change effort knows, the politics often make or break the outcome. My being committed to drawing on the strengths and feedback of many people within the organization proved essential to the birth of the new ergonomic program. And just as its name portrays, the program is aimed at implementing many innovative ideas, as well as strengthening the old processes to ensure ongoing success.

## CHAPTER FIVE BUILDING RELATIONSHIPS

*“The role of the leader is to ensure that the organization develops relationships that help produce desirable results” (Fullan, 2001, p. 68).*

When the prior coordinator for Employee Health Services (EHS) resigned, the change provided me a refreshed perspective and new opportunities for collaboration between PEP and EHS. I volunteered to see to it that ergonomic interventions for injured workers continued to be provided, while the EHS coordinator position remained vacant. This period of coverage for EHS responsibilities lasted for five months, during which time I was able to make some immediate changes that helped to streamline a variety of processes.

Because the previous coordinator and I often managed our programs in very different ways, I was given the responsibility and opportunity of paralleling the procedures for dealing with injured workers’ ergonomic services, after those I had recently implemented in the preventative realm. I actively sought out feedback from those directly affected by the new procedures, and received extremely positive reviews. Using this newly gained knowledge, I continued shaping and streamlining processes until they proved most effective for the customers receiving the services, as well as the key stake holders involved in the process.

When Sallie, the new EHS Coordinator was hired, I was able to relinquish about 10-15 hours of my workload each week, as the responsibility was reallocated to EHS. Within the hierarchical context of the health system, Sallie and I stood on even ground in terms of coordinating parallel programs. We were set apart slightly by the fact that she

had two other employees working with her on EHS' functions, whereas I was the sole person designated to perform ergonomic-type services.

As part of her new employee orientation, I spent six sessions orienting Sallie and one of her staff, to the ergonomic policies and procedures for injured workers. We designated the first four of these sessions a time to review the old processes and the later two sessions for discussing the recent changes I had been busy implementing. The open dialogue of what had existed and what was most recently revised, allowed each of us to see the strengths, as well as existing areas for continued improvement.

Anticipating my last orientation meeting with Sallie and her staff nurse, Kitt, I looked forward to having some closure on this five-month period of coverage for EHS functions. I felt a sense of heightened energy within me as I imagined our two departments coming together for the first time as a team. In contrast, I was reminded of how draining it was for me to have worked with the last EHS coordinator; her inability to think outside the box was a tedious and deflating experience for me.

#### Endings Lead to New Beginnings

I arrive a few minutes early, as usual. Busy picking up the newspaper and magazines strewn about the long conference table, I am able to reflect on our mutual goals for the meeting. Having decided to explore a process improvement initiative together, we have invited a fourth participant named Shae, to help guide us. Shae was a buyer in the Purchasing Department, and her connection to our work was through her role of ordering all furniture used by employees.

Sallie and Kitt arrive together and we all exchange our usual open, yet not to personal greetings. Shae arrives next and exclaims "Oh my God, if I have to walk to one

more meeting in these things, I think my feet are going to just rip right off my legs!” She is wearing one of her usual high heel type sandals, advertising her brightly painted toe nails. Although I think of something kind of sassy to say, about if she were to stop wearing those high heels everyday, her feet may not hurt at all; I resist the temptation.

### Easy Interactions

Although Shae and Sallie were hired within the same month, Shae and I seemed to establish immediate rapport right from the start. We just clicked. Based on our involvement in the procurement of system furniture, we have met each week with the vendor, as a means of continually improving the service provided to our customers. During our meetings, we laugh just as much as we accomplish work efforts. I think it is this balance between dealing with the serious issues, yet allowing ourselves to make mistakes and then laugh about them that is part of our ability to be successful. I look forward to our meetings. I believe that they give us a time to feel productive, yet have some fun.

In keeping my mouth shut and not making my sarcastic comment, I recognize that I do so because I do not want my comments to be taken the wrong way by the women from EHS. I do not know them as well as I do Shae, and although she would laugh and most likely agree and laugh along with me, Sallie and Kitt might not accept my humor.

I recognize that if Shae had made the same exclamation during our other weekly meeting, our team would have rolled in laughter, and then gone on telling similar types of stories with one another. Thinking about how we would use the story to connect with one another and break the ice, I find the discrepancy between the two teams fascinating. It is a personal reminder that the committees I serve on are in different places in terms of the

interpersonal relationships. I recognize my level of investment and trust in my relationship with Shae is much higher than that with Sallie and Kitt.

#### Disparity among Interactions

As Shae leaves, I take note that the remainder of the meeting does not seem to be headed in the same productive direction as the previous five of the past. The style of conversation is different than others we have had in the past. The dynamic feels strained and the balance is off.

I know I tend to read people well and that something is just not right. What happened to the ease with which we have carried on in the past? We have been working so well as peers, with this “we are in this together” team-based approach. Well, the team-based aspect is not apparent today.

With crossed arms and a bit of a scowl on her face, Sallie is much more rigid in her mannerisms. Her choice of words seems strained, and more professional in nature. Am I the only one noticing these changes? Neither of the other ladies seems to notice. I figure it wise to check my perceptions, and I mention to her that this meeting feels different from our others; in that I feel that we are talking in circles. She agrees and says, ‘Yes, we are talking in circles. We need to just end this meeting.’ With this abrupt comment, she stood up and left the room.

Observing her more closed body posturing and flat affect throughout the session, I perceive that she must be either angry about something or stressed out. Feeling like we were not getting our points across very well, the flow of the meeting felt off the entire session! In reflecting on this situation and trying to make some meaning out of it for myself, I immediately thought of another, similar interaction that I had witnessed about six weeks prior.

I was sitting with my supervisor in the cafe, having our bi-monthly meeting. Although she was behind me and out of sight, I instantly recognized Sallie’s voice as she began talking to my boss. They exchanged some brief information about a project they both seemed to be involved. Sallie explained that she would get back

in touch with her but she had some things she had to deal with right away. She seemed shaky, as if she was unable to make up her mind about something or wanted to get out of there fast. Maybe she was uncomfortable interrupting our conversation? She was clearly in a hurry and seemed to have a great deal on her mind. Their interaction was weird for both of them, it seemed. After Sallie left the cafeteria that day, I asked my boss: 'What the hell was that about?' She commented that she was not sure if she had offended Sallie in some way, yet she was a bit puzzled by the strange affect.

Recognizing that in both of these situations Sallie seemed either frustrated or stressed out about something, I figured that I better learn how to read her better if I was going to work well with her.

### Smoothing Out the Edges

I decided to write Sallie a note and include a Starbuck's gift card. I wrote the card several times on a scrap paper not wanting to waste my last note card. I figured this would allow me to be sensitive, yet professional. After all, there may be good reason why she was so "ultra" professional. A less personal approach seemed more comfortable for her and hopefully a good approach for me to take with her in return. By using this more professional approach, I hoped that I might be able to connect with her in her comfort zone, so that she might eventually feel comfortable breaking out of it. The note card read:

Hi Sallie- 2/26/04  
Our meeting this week was different than our other 5 collaborative sessions. I perceived you have a great deal on your plate, and hope things are going well for you. If there is something you feel we should discuss in regard to our processes, please let me know. Otherwise, please enjoy this treat on me.  
Best wishes, Rachel

Having given her two days to read my note and some distance from our recent interactions, I stopped by to check in on her and hopefully develop a greater understanding of Sallie. I entered her office behind another woman, whom I recognized as Roxanne, the third member of the department. After waiting until the information had

been exchanged, Roxanne mentioned, “Rachel is here,” then got up to leave. I apologized for any interruption, although I recognized they were just chatting.

I mentioned to Sallie that I had just stopped by to see how she was doing. She smiled and mentioned that she was doing better than she was the other day. She said that she was supposed to be at a meeting off site that day, but had sent Kitt instead so that she could catch up from the things she had not managed to get accomplished during the earlier part of the week. I extended my hand, gave her the note card, and said, “I just want to check in with you and make sure that my new partner is doing alright. I hope that you have a nice, relaxing weekend.” She said, “Thanks, Rachel, I hope you have a good weekend, too.”

#### Making Sense of the Messiness

As I left the building, starting on my two-block trek back to my office, I felt relieved. It is important that Sallie and I work well together. I was happy knowing that my initial perceptions of her just being stressed out seemed to be accurate. When I got back to my office, I had already received an email from her. She thanked me for the gift card, and exclaimed, “How did you know Starbuck’s was one of my favorite places to have coffee?”

She explained that she felt we were on the same page with our process goals, and just wanted to make sure that everyone had an opportunity to voice an opinion about the process. She closed the email by stating that she really appreciated my looking out for her.

Pleased that my note was well received, I felt I had accomplished my goal of checking our perceptions to see where we may have had gaps in our thinking, while being

sensitive and supportive of her. I responded that I was glad we were still on the same page, reinforcing my hope for ongoing teamwork between our departments, and mentioned to her that if she could use a sounding board, or a brisk walk, that I was only a phone call away.

Leaving on this Friday afternoon, I was aware that with this healthy resolution among us, we were better prepared to work together as a team. Having dealt with the messiness of this interaction, and being able to emerge united, would give us a better chance of being successful in dealing with challenging situations presented by others.

#### Time to Partner Up

Within only a week's time, the first challenge presented itself to Sallie and me. The phone rings: I answer with my usual "This is Rachel, how can I help you?" greeting and I immediately know it is Sallie when the voice says, "This really burns my ass!" The heat in her voice allows me to make the immediate connection with the similar frustration I had experienced earlier that week. Hearing her tell me "the latest in the saga," I realized that we were both experiencing this total disregard from a particular supervisor, on somewhat the same level. Because this interaction with the supervisor is consistent for both of us, it seems less of a personal offense to either of us.

Although I could relate to Sallie's frustration well, I was somewhat surprised that she expressed it the way that she did. She has indicated that she likes to be fully informed before making decisions aligned with any one direction. The phone call I received from Sallie made me think she was less analytical and more expressive than I anticipated.

Sallie had suggested during our phone call that maybe we should just avoid working with the supervisor and just invite her boss to a meeting to discuss our mutual frustrations. I felt that going over the supervisor's head was not appropriate and a mistake

for both of us politically. Believing that pointing fingers and drawing negative attention to our circumstances would have negative ramifications for both of our individual and combined injury prevention efforts, I needed to speak up.

I shared my discomfort and reasons why I felt we should include the supervisor in our meeting. After hearing me out, Sallie agreed that we would be inclusive and maybe even have the opportunity to confront some of the unprofessional behaviors, we had experienced with them both present at the meeting.

During the meeting the following day, only the supervisor showed up, not her boss. When she made excuses for why she had not followed-up with either of us, neither Sallie nor I became defensive, although we said nothing that would indicate that we agreed with her rationalizations, either. We were testing out the interaction, somewhat reluctant to make her entirely comfortable at that point. Sallie and I both seemed to have this trait: Neither of us is a people pleaser in the sense that we are not interested in going out of our way to ensure this supervisor feels safe.

Sallie and I shared the co-facilitation role very well, bouncing the conversation back and forth between one another. I had no concern during the session that she and I were not communicating well. I wondered if something just clicked between Sallie and me. Why were we not experiencing any of the weirdness of the prior week? Is Sallie under less stress? Was the formality of this sort of meeting more comfortable to her than our last week in which we were trying to bounce between various topics? I spent some time thinking about the contrasting experiences.

Comparing the two interactions allowed me to make meaning of what adjustments I can make, so that we could continue to be successful in our interactions. If I could learn

what circumstances allow Sallie to be most successful interacting, then I may be able to flex to those situations better, so that our combined processes are more successful. Maybe by getting some distance from our one-on-one interactions would allow me a bigger picture perspective of Sallie, and how she functions best.

An opportunity for further insight presented itself about two weeks later at our seventh monthly injury prevention meeting. Having attended only the past three, Sallie was the newest member to the committee, based on her length of employment with the health system. At this meeting, Sallie did not do a great deal of talking. And it was based on what she did not say that I was able to learn a great deal from her.

#### Unspoken Words

Through most of the meetings, as with this session, one person dominated much of the conversation. Having been the most involved in tracking injury rates in the past, this man demonstrated his knowledge by talking non-stop and in a manner as if he were lecturing to a class. Because I generally perceived this type of behavior as condescending and arrogant, I had found myself challenging this person in the past. At this session, however, I made a conscious decision to simply keep quiet and observe.

Not only does keeping my mouth shut keep the negative attention off of me, it also allows me to be more observant of group interactions. In doing so, I noticed two people rolling their eyes during his soapbox speech, and noticed Sallie was not letting off any sign that she was annoyed, nor supporting his sales pitch. Once he got onto a topic that I knew would involve Sallie's program, I watched carefully.

From anyone with any interpersonal astuteness, he would have stopped what he was saying and interjected something like, "Sallie, can you tell us about this process that

takes place in EHS?” Not the chatterbox! He kept right on talking about her department as if she wasn’t sitting at the table. Intrigued with how she would handle this, I took careful notice. Sallie opened her mouth wide as if she were going to say something, then like a crocodile snapped it shut. To my surprise that was the end of her effort to interject, and chatter box kept right on reeling away.

### Checking Perceptions

Not knowing whether Sallie’s thoughts had been stewing into a batter of frustration or if she was not bothered by this situation, I had a chance to gain further knowledge during a follow-up meeting. Walking into the EHS office, I am greeted by Sallie, Kitt, and Roxann. Comprising the EHS department, Sallie is the leader. She likes to keep her employees informed and felt it important for us all to meet as a group. This is especially important because Sallie was not present for a related “overhead back lifting” meeting, while both of the other women had attended with me. Both EHS and PEP are represented on both committees and my hope was to serve as the common thread.

We all said our usual hellos and began to discuss to idea of having the overhead back lifting committee (currently run by the chatter box) become a project of the injury prevention team. I explained that it was my vision to bring the injury prevention team together in the first place. Sallie asked for some clarification, and I elaborated. I realized after writing the ergonomics program proposal that I was not going to be able to affect injury prevention as much alone, as if all of the departments (EHS, Safety, and PEP) came together to work as a team. As a result, we had a first “coming together of the minds” in October 2003, and had met since then each month, for the previous 6 months.

Sallie commented that she is surprised that the group had been together that long because the process seemed somewhat dysfunctional.

Pleased that she recognized this first, I could build on her comments, rather than be the one to present this concept myself. I guess this is an example of just playing my cards right, or allowing the process to emerge as a group rather than

telling everyone how it should be done. Building consensus was my goal for this meeting.

Sallie went on to say that every time she returns from one of those meetings, she just about “needs to take a time out.” She says that she is so frustrated and is totally lost as to where the group is headed.

I could have been screaming inside of my head: Yahoo! I am not the only one that feels this way and thank goodness she feels this way too! It is going to be easier than I thought to get Sallie’s buy-in that this process needs an overhaul if we are going to get anywhere. Her explanation that she has been so frustrated with the situation, allowed us to connect on the same playing field. She mentioned, “I am so glad that you feel the same way. I thought I was the only one that was feeling like pulling my hair out after those meetings. At least I will not go bald alone!”

Being able to relate to Sallie’s frustration, and for her to recognize that we are both equally frustrated, allowed her to share with the three of us that she learned group process skills in one of her last jobs. She shared a detailed story with us, as if she had learned to become expert in-group process, and I enjoyed sitting back and allowing her to be the leader of our meeting for a while.

While I would normally feel some need inside myself to prove to her that I have plenty of experience running groups as well, I resisted. Keeping quiet and allowing her to talk, I was able to learn so much about her experiences. Many of them reminded me of my own. I was reminded of the kids in the adolescent home where I conducted anger management class, the adults in the mental health day treatment center that learned assertiveness skills, and then conducting my own thesis study using activity-based techniques to improve communication skills.

All that time listening to Sallie, I was able to draw upon my own mental models and experiences in my past. In doing so, I not only practiced my listening skills, I was able to allow myself to be vulnerable, with Sallie as the leader with these skills.

### Finding a Treasure

Then something clicked and I was able to make connections for the first time with clarity. When I first met with Sallie and Kitt, I remained quiet even though I felt the urge to be myself, out of concern that they would perceive me the wrong way. I was not safe, so I kept my sense of humor to myself, for fear that I would be misinterpreted. I did not allow myself to be vulnerable.

Through many trials and tribulations, I have had the opportunity to observe, interact, and learn from Sallie. I have asked many questions so that I could gain a better understanding: I hoped that if I paid closer attention, I could learn how Sallie functions so that I could figure out the best way to adapt and work best as a team.

Meeting with Sallie's group this time, I also was quiet. The silence was no longer driven by insecurity and control. It came from a vulnerable place that allowed me to recognize that only by letting go of the process will I be successful influencing it. As I finished listening to Sallie's story, I was overwhelmed with emotion. I was not only proud that this revelation had occurred to me, I was also so happy that Sallie had enough trust in our relationship, that she too was allowing herself to be vulnerable and give into the process.

I was pleased that Sallie and I were able to work so well together. It is so refreshing to exercise my clinical judgment and be back-up, rather than get put down for voicing my opinion. I just received an email request from a supervisor, asking me to

consult on the design layout of an area in which employees have been experiencing symptoms working in the old set-up. In response, I requested that the supervisor complete an incident report and send it to EHS and then I would be able to see them. In sending this email request to the supervisor, I included Sallie on the correspondence. Upon receiving the email, Sallie called the supervisor to review the process with her and we are all set. She sent a follow-up email to me, ensuring that we both understood the plan:

FYI: I spoke to the supervisor and explained the process for initiating ergonomic services, including the necessary paperwork. I asked her to send the completed paperwork back to us ASAP, so you can initiate services in the timely manner you requested. I will let you know when I have the paperwork in hand, so you can get started. Sallie

This is the way the process should work- professionally, supportively, and effectively!!!

Yahoo! I respond back to her email, making sure to include Sallie's boss, Tammy, on the correspondence:

Good-bye triage form, hello teamwork! Can't thank you enough, Sallie. Rachel And I wasn't the only one noticing the positive impact of working effectively as team members. That same lady that compassionately placed her hand on my shoulder during the difficult conversation with Carmen several months ago, respond back to me with the following:

Makes me smile- thanks for including me on this Rachel! Take care. Tammy

## CHAPTER SIX

### MORAL PURPOSE

*To achieve moral purpose is to forge interaction-and even mutual purpose-across groups. Yet the problem is that people are not equal and the privileged have a vested interest in the status quo as long as it works in their favor”  
(Fullan, 2001, p. 25).*

Fullan also referred to this concept of moral purpose as making a difference in the work place (2001). Fortunately in my line of injury prevention ergonomics work, no one intentionally seeks to become uncomfortable, unproductive, and dissatisfied. Naturally, people want to feel good, be purposeful in their work, and enjoy their jobs. Making an effort to foster improvements in each of these work aspects is what Fullan refers to as “making-a-difference.”

Focusing on a sense of purpose is an essential aspect of leadership. And while working together to tackle tough problems requires creativity and vision, people are generally intrinsically motivated to work together to improve their daily lives. By taking part in the change process, employees will come to know “the higher calling or enabling purpose of their work” (Fullan, 2001, p. 28).

Attempting to energize people to pursue the common goal of preventing injuries involves a number of stakeholders. The primary stakeholders are the employees themselves. Secondary to the employee are his/her co-workers, whom play an important role in either positively or negatively, affecting the employee’s ability to be successful with preventing an injury. This seemed especially true for employees who are very social with their peers, peer groups that work closely together, and those employee groups that share equipment and space with one another. Accordingly, it is essential to take into account the social dynamics of groups, when providing ergonomics services.

An employee's manager is also an important stakeholder in the process of preventing injuries in the work place. Like fellow employees, management plays a key role in providing either supportive or not so supportive feedback to an employee. The main difference however, is that management is in a position of power, rather than the peer relationship that fellow employees maintain. This affords management more formal influence over the decisions made on behalf of an employee, and in some cases, by the employee themselves.

Each of these stake holders become involved in the process of receiving ergonomics services. One of the keys to successfully preventing work place injuries is to successfully engage these primary and secondary stakeholders. One's ability to elicit employee and management engagement is critical to achieving a successful outcome for the primary employee.

### Engaging Employees

To become an active participant in the process of improving their comfort and/or positioning, employees must be presented with the concepts of injury prevention, in a way that is meaningful to them at the time of their request for services. I have found that by first and foremost meeting the employees' needs, they are often open to gaining awareness about things outside the initial issue they were attempting to resolve.

### More than Meets the Eye

This approach has often allowed me an opportunity to make a greater impact on the overall comfort level of an employee, rather than just addressing the specific issue that prompted the referral. Following an ergonomic intervention, employees often expressed that they felt "taken care of" and appreciated that "someone cares about us."

As a result, I received many requests for ergonomic services from employees whom had been referred by one of their coworkers.

It seemed that favorable results with one employee quickly spread to increased referrals, and a shared process for learning, within pockets of the organization. In some cases, employees simply provided advice to his or her coworkers about what they had learned, and/or began advocating on behalf of their coworkers, when making requests for follow-up services. And sometimes while working with an individual employee, I was made aware that feedback had been exchanged with their manager.

### Engaging Management

Maintaining open lines of communication with management was inherent in the process. I documented each of the ergonomic services provided to the organization in the form of a report, so management was always kept abreast of the work being done with employees in their area. When the needs of the employees were well met, this sometimes prompted managers to go out of their way to provide positive recognition for the Proactive Ergonomics Program.

### Receiving Positive Recognition

Positive recognition was received in a variety of ways from management. Some chose to send an email of thanks or a hand written note card. Often, managers stopped by the Proactive Ergonomic Program office to express their appreciation in person. The hospital also used a Reward and Recognition program coordinated by the Human Resource department. On occasion, I would receive a certificate that could be used at a gamut of retail shops or restaurants in the area. The final way in which management

expressed a growing awareness and appreciation for the Proactive Ergonomic Program was to refer more of their employees for ergonomic services.

Often, the manager would also request an ergonomic evaluation for his or her own work station. This was a neat opportunity to provide some first-hand education and further build credibility about what the ergonomic services could afford them and their employees. While the majority of managers utilized the new information to develop an appreciation for how to meet the needs of their employees, few were unable to make this transition and ridiculed the efforts of the Proactive Ergonomics Program.

#### Receiving Resistance

These managers took notice of the ergonomic findings, not because they were in favor of the recommendations for improvement, rather they expressed resistance toward the information provided. This often evoked a contradictory reaction from that of the individual employee. What pleased the employee, in turn, challenged management by presenting them with thinking about the work of their employees differently. And experiencing these types of discrepancies afforded me some fertile ground for learning.

The remainder of this chapter will illustrate my success and struggle with meeting the needs of each stakeholder group. In doing so, you will meet Kristen and her director, Jennifer. This portion of the vignette will depict an example of successfully engaging an employee and her manager, as well as receiving positive recognition. The latter portion of the vignette introduces you to Samantha and Dirk, a different set of characters. These folks introduce me to the dichotomy between pleasing one and pissing off the other. But first, let us examine the ergonomic principles for approaching both employees.

## Opportunity for Improvement through Ergonomics

Ergonomics is the science and art of examining the interactions between the worker, the task, and the work environment. Ergonomics employs various bodies of information that allow the evaluator to understand the effects of the job on the worker. Each of these elements of an occupation (work, task and environment) has various characteristics, which are important to evaluate. Several examples of worker characteristics to take into consideration are the skill and experience level, behavior and motivation, physical fitness, size, general health, vision and hearing, sensitivity and pain tolerance, and personal protective equipment.

Aside from the worker, task and environmental characteristics are equally important to take into account. Task characteristics include: complexity, tooling and equipment, workplace geometry, force and human power requirements, contact and support surfaces, vibrations, work pace, and duration. Environmental characteristics to keep in mind are accessibility, lighting and visibility, cleanliness and housekeeping, thermal comfort, vibration to the entire body, noise, air quality and ventilation, exposure time, as well as job stress.

These concepts were standard components within my written report. The reports were dictated for the purposes of sharing the information with the employee's manager, maintaining a record of services for all employees served, as well as a written record for the employee to refer back to the specific recommendations, in the event that they found his method of learning to be effective. The verbal account of these concepts during the actual ergonomic service with the employees was tailored to meet the specific requests and learning style of each employee.

## The Philosophy of Proactive Ergonomics

When approaching a worker, as well as his/her task and environment, there are certain principles that guide my ergonomic evaluation. First, active participation on the part of the employee is encouraged, as problem-solving techniques are a collaborative effort. Accordingly, a prescribed stretching program often accompanies my recommendations.

Second, whenever possible, I attempt to use the equipment that is currently in place. This may require educating the worker on positional techniques and /or recommending equipment to aid in better positioning. When necessary, recommendations for alternate equipment are made in order to maintain or further improve productivity, safety, comfort, and worker effectiveness.

Lastly, whether the worker is functioning in an office or industrial environment, the four main objectives remain the same. These objectives include improving the employee's productivity, safety, comfort, and work effectiveness. Of course, these objectives are prioritized based on the specific request made by the employee.

### Making a Difference for One

Kristen, a transcriptionist, whom was responsible for typing the dictated reports from physicians, made one such request. She was the first employee from the transcription department with whom I had the opportunity with whom to work. She had visited the employee health department and received an ergonomic referral. Kristen was primarily interested in restoring her comfort level.

### Description of Comfort Level

When questioned about how she feels while working, Kristen described fatigue and discomfort. Because fatigue and discomfort often precede pain symptoms and injury, I was pleased that this employee expressed interest in participating in an ergonomic evaluation before she become more severely uncomfortable. By providing corrective recommendations to a compliant employee who has not yet entered the disease stage, the chances of returning that employee to a state of comfort increase. Specifically, Kristen described experiencing right-sided arm shoulder tightness, and some infrequent discomfort in her legs.

### Description of Job

Kristen reported that she had been working for the organization for 16 months. She explained that computer-related activities required approximately 90% of her work time. She also attended meetings approximately 10% of her time, varying in length and location. She reported that she has one regularly scheduled, three-hour meeting. Other essential job functions performed less frequently include phone use, writing tasks, and a variety of administrative tasks.

Working at an L-shaped workstation, Kristen's monitor rests on a laptop docking station, and keyboard and mouse are positioned in front of the monitor. She utilizes separate wrist rest for her keyboard and mouse, maintains her phone and writing pad on the right side of her desk, and sits in a fully adjustable chair.

### Risk Factors

Based on my observations of Kristen, as well as what I learned from her directly, I developed a list of factors. These factors help shape recommendations for improvement,

geared toward maintaining or improving her productivity, safety, comfort, and worker effectiveness. Kristen's list of risk factors included the following:

1. This employee demonstrates a forward head posture. This is a very common poor work habit that makes a significant contribution to the risks of cumulative trauma disorder (CTD). This position is described as a rounded shoulder posture that can stress the neck, shoulder, upper back, and lower back. This posture weakens spine muscles and reduces posture endurance. The lateral neck muscles are exposed to excessive work demand and loss of flexibility. This can lead to compression of nerves and blood vessels passing through these muscles on their way to the upper extremity. This compression of nerves and blood vessels in the neck can significantly increase the risk of various CTDs further down the upper extremity. This is referred to as thoracic outlet compression. A lack of circulation to the upper extremities do to this posture problem reduces the upper extremity work tolerance and increases the vulnerability for the development of various CTDs.
2. Kristen's monitor height is excessive when her feet contact the floor.
3. This employee demonstrates awkward reaching for various equipment items. Most commonly, this employee reaches frequently for her telephone, which is positioned to the right of her desk.
4. Kristen maintains a static, posterior pelvic tilt while seated. This position compromises a neutral spinal position and encourages sciatic symptoms.
5. This employee is too short in stature to work at her desk and maintain comfortable, productive positioning. Although she has a footrest, it does not much improve her body mechanics.
6. This employee reported that she utilizes a bolster to counteract spinal discomfort while sleeping. She mentioned that she has had difficulty finding a cervical pillow that provides adequate support and comfort while sleeping.
7. The size of the therapy ball that Kristen is using is 55cm, which is too small for her height. Using a therapy ball this small on a consistent basis is not advised.

The type of risk factors identified during the evaluation lead me to take certain actions at the time of the ergonomic service, in an attempt to mitigate any risk factors from continuing or from getting any more severe and/or frequent. When an immediate improvement cannot be made at the time of the evaluation, then recommendations for

improvement are made. The list of actions I was able to take with Kristen at the time of her ergonomic intervention included:

1. Demonstrated what forward head positioning looks like and provided education to create awareness about the importance of improving her neck positioning.
2. Instructed Kristen in the proper height that her chair should be kept in order to allow for optimal body mechanics.
3. Explained that excessive neck flexion, or a “hunched over” position to see what is on the paper and monitor places the neck in a compromised position.
4. Removed the blue lumbar cushion she had been using in an attempt to provide her support while seated.
5. Adjusted Kristen’s low back support (that is a feature of her chair) in the lumbar region of her spine for improved comfort.
6. Simulated the use of a reading/writing board for frequently viewed documents. We discussed the added benefit of maintaining her documents on a positive angle while working.
7. Demonstrated forearm stretches in order to ward off tension in forearms.

The list of recommendations for improvement I made for Kristen included:

1. Kristen should maintain her feet flat on the floor. We reviewed the two alternate leg crossing positions that present less of a risk than the typical crossing Kristen demonstrated during this evaluation.
2. Provide Kristen with an articulating keyboard to help improve her positioning while working.
3. Kristen should utilize the back of her seat for support, rather than holding herself up in space. By sitting all the way back in the chair with a good lumbar support, forward head positioning is generally corrected as the head comes into neutral alignment (the ears are over the shoulders).
4. Kristen should keep her chair at a height to allow her hips to be slightly higher than her knees. This encourages weight bearing into the lower extremities, so that all of the weight of the upper body is not held in the lower spine.
5. Consider utilizing a reading/writing board, to be used in front of her monitor. By placing the documents on a positive angle, the neck is able to come into a

neutral position, rather than being held in excessive flexion while viewing a document placed flat on the desk.

6. Avoid the awkward observed reaching for the phone by moving it to a closer location. Several options were identified together.

7. Consider utilizing a lumbar roll to adapt a chair that is not adjustable, during meetings that last greater than 60 minutes in length.

8. Consider obtaining a cervical support options while sleeping, to improve neck positioning while maintaining a static position for long period of time.

9. Consider utilizing a larger, 65cm, therapy ball for consistent use at the workstation.

10. Employees should be trained, motivated, and required to maintain the correct body mechanics and to perform preventative stretching procedures specific to this type of job. These preventative exercises include standing back bend, chin tuck, lateral neck stretch, forearm stretches.

#### Recommendations for Improvement

I make a point of reviewing these recommendations verbally with Kristen, to ensure we mutually agree with including them in my dictated report and sending the report to her manager. This also helps me recap the ideas that were generated by spending time listening to and observing Kristen, as well as to provide a review of our experience together. This allows me to be clear on what transpired during the ergonomic service, an opportunity to check my perceptions with her, and for her to hear the ergonomic principles a second time. This repetition is intended to enhance Kristen's ability to absorb the new information I have shared with her.

Before I leave, I give Kristen my contact information, should she have any questions that may arise from the time we spent together, or would simply like to contact me. And I make a request that she get in contact with me should she experience anything

uncomfortable or concerning as a result of the changes we made to her work station and body positioning. Two days later, I received an email from Kristen:

Hi Rachel- I wanted to thank you for taking the time to work with me this week. I have been thinking about the things we discussed and I would like to give that pull out keyboard thing a try. And thanks for letting me think about it; I know I was stubborn about the idea when we met. How do I go about getting one ordered? Also, I have been talking to the six other transcriptionists in my area about how they should not hold their necks out like a bunch of turtles and-- after some laughs--they seem pretty interested in this type of information. Would you be able to help them out too? PS. I think some of them hold their necks like turtles and the other ones look like giraffes- they need some help! Thanks again, Kristen

I am excited to receive Kristen's email and work to get her articulating keyboard ordered and installed that same week. It is important for me to act on her request efficiently, especially since it is pretty significant that she is even willing to entertain the new equipment option. She had been resistant to the idea initially, so I had not been too forward in my expectation that she use one, rather just presented her with the option. I had suggested that she stop by another area in which I had done some work, to see for herself what the employees in that area thought of the equipment they had now been using a few weeks.

Recognizing the request for an entire department-wide ergonomic intervention, I phoned the supervisor of the department to discuss this request for services. I tried to elicit buy-in from management early, whenever possible. This allowed me to be more successful with negotiating with them later on, when I often needed their support. It was really important for me not to create any unnecessary negative "PR" for the Proactive Ergonomics Program.

I stopped by Kristen's workstation on the day I knew it was being installed so I could see how she was doing and meet some of the employees in her department. I was scheduled to conduct a department-wide training for transcription the following week. I

had asked Kristen if she would help me demonstrate some of the body positions we had reviewed together during the training and I was happy she had agreed to partner with me. When I reached the department, I was encouraged to find Kristen using the articulating keyboard, maintaining her feet on the floor, and using her chair in a healthy position.

### Making a Difference to Many

On the morning I was scheduled to conduct the department-wide training for transcription; I received another email from Kristen:

“Hi Rachel- I know you are coming for your training today with our group and I just wanted to give you a little heads up about something. I have been using my keyboard like you and the installation guy recommended and since that time I have been getting a lot of attention from some of the folks around here about it. Several of them have asked me how they go about getting one of these and several of them have asked to use my station so they can try it out. This hasn't bothered me any; I kind of like showing them how to use my new toy. I hope I have not stirred the pot, but I think you are going to have some questions about how they can get one of these too. I hope they are not expensive! See you this afternoon, Kristen”

As I read the email, I am smiling wide. I am satisfied knowing that I have a champion within the transcription department. I feel the satisfaction is even sweeter in that I first pegged Kristen as a resister to change and she seemed to be transforming into an ergonomic leader for her department. I get a little lost for a few minutes while I toy with the idea of having little ergonomic rangers all across the organization, helping to lead the effort that sometimes feels like a pretty solitary mission.

I completed the department intervention that afternoon and left with a long list of requests from the transcription department. It was interesting for me to take note of the difference between making recommendations and in this case leaving with requests from others. Maybe some sort of “pull” for services was being requested, while I had always envisioned pushing the ideas out--thus the terminology “recommendations.” Most of the

requests were for equipment items, none too much of a surprise after receiving Kristen's email that morning.

The more interesting request, however, was for me to go and work with several of the documentation coordinators at one of the off site clinics. I learned from one of the transcriptionists that they had shared the information about me working with Kristen and coming to conduct the training in their area with some folks from the clinic. Apparently, there was a growing interest for me to provide similar ergonomic consulting with this group.

I left the training feeling happy and honored that these employees felt good enough about what we had been able to learn together that they would share their learning with others in a whole different section of the hospital. Progress was certainly being made with growing awareness of the Proactive Ergonomic Program. And the neat and somewhat unexpected part about it was that others were really making that happen, rather than me trying to make it happen. Yahoo!!

About a week latter, I received a final email from Kristen:

Hi Rachel- I just wanted to give you a little update- I have been using a neck pillow at night and a ball at my desk (trading off with my chair) for about two weeks now. They both took some getting used to and now I use the pillow every night and the ball about ¼ of each day. Thanks again for your help with making these suggestions. I have my follow-up appointment with my doctor tomorrow and will be happy to be able to report to him that I'm pain free, thanks to you!! I appreciate you have taken such great care of me. Kristen

I had not eliminated Kristen's pain. I had simply shared some knowledge and tools with her. Equipped with these resources she was left to make a choice: She could use what has been offered to her in a constructive way, by choosing to make a behavioral change, or

not. She simply needed to develop some awareness about her ability to make this choice for herself and then make good use of that awareness.

That same day, I received a hand written note from the supervisor of the transcription department:

“Rachel- I appreciate what you do for the Transcription staff. I am supportive in being proactive and working with your guidance. Please do what is necessary in ensuring the best in ergonomics for the team. Thanks, Jennifer”

I felt a sense of honor that Jennifer appreciated the benefits of her employee receiving the services she felt she needed. I also recognized that this manner seemed to hold the Proactive Ergonomics Services in high regard and by doing so; I was becoming a more credible contributor to the organization. This was the type of feedback that fueled me, filled my ego that wanted to be seen as doing a good job within the organization, and made me feel motivated to try to find ways to reach as many employees with ergonomic interventions as possible.

And it was a good thing my ego was filled up. I was going to need to ride that emotional high as long as it would last me, given my next encounter would not be so personally fulfilling. Just as I felt I had made great progress with the transcription department and received positive recognition from their manager, Jennifer, I was about to encounter quite the contrasting experience with Samantha and her boss. I would soon meet the status quo head on!

### Making a Difference for One, Yet Not the Other

I met Samantha as she greeted me in the waiting room of the medical clinic for which she worked. It was located a few blocks from the main hospital. She was cheerful and eager to have me look at her station. As she walked me back, I noticed the short

strides she took while walking. She was also holding her neck somewhat off to the side, as if she were trying to talk in my direction despite my walking directly behind her. The hallway was unusually narrow on our walk back and this did not allow me to sneak up beside her, rather I walked single-file style until we reached her area.

The space in which she worked was a small rectangular shaped room. While I stood in the doorway and peaked in, she scurried over to a nearby cubicle and dragged a chair back for me to use. She accomplished this while telling me what she spent her day doing. I had not yet elicited any feedback, yet patiently listened until she stopped to take a breath.

#### Description of Job

By that time, I had learned that she spent 50% of her time making schedules for the physicians, residents, and faculty personnel. She pointed out that half of this time is spent reworking revisions in the schedule for residents and faculty. These revisions are the result of residents and faculty requesting that their schedules be changed to meet a variety of their needs. The remaining half of her time was spent doing the “rest of the job,” which comprised of computer projects, and maintaining spreadsheets, telephone use, and communicating with various people via email.

Taking the opportunity to interject, I thanked her for the information and repeated it back to her. I had learned to do without pen and paper during instances like this, yet I could only retain so much verbal information, before I needed to jot some notes. I asked Samantha if she would simply spend a few minutes working, as if I were not even present, so that I could observe the manner in which she typically performed the functions she had just explained. She was agreeable to this request and while she started

accessing a file on her computer, I pulled out my templated ergonomic evaluation forms, yellow legal pad—which always served as my scratch pad and firm surface on which to support by documents, and one of my Proactive Ergonomic Program pens. They were thick and ergonomically correct, a marketing tool, and memento for each of the employees I served. To keep my departmental costs down, I ordered them in bulk and always had them on hand.

In the ten minutes or so that Samantha worked, she demonstrated the following risk factors:

1. Samantha demonstrates a forward head posture while reading, writing, and typing.
2. Samantha's posture is slouched and flexed forward while writing.
3. Samantha maintains her mouse a far distance from her keyboard, which creates excessive reaching for the right upper extremity. This especially places the shoulder in an awkward position for long periods of time.
4. Samantha uses a foot rest, when her feet could more adequately weight bear onto the floor.
5. While seated, Samantha utilizes her chair in a position that is too low to allow for a health hip position.
6. Maintaining a static neck tilt position while on the phone poses problems directly to the neck and throughout the upper extremities.
7. The number of revisions she completes each day limits Samantha's work productivity. This is a source of rework.

Based on the forward and lateral neck, back, shoulder, and hip positions I observed Samantha maintaining, I spent some time talking with her about proper alignment. The second action I took with her was to explain the use of a reading/writing board and the benefit it provides for the neck, back, and eyes. I used my legal pad as a prop during my explanation, to simulate the function of this foreign equipment option. I had the board in

my car, which was parked outside, however, I stopped showing up with equipment, as to not scare people off right from the start. I found it more important to elicit an employees' receptiveness to consider using a new equipment option, before I walked in with one and presumed they would be open to using it. I always liked to give employees a choice in the matters that concerned them.

Next, I helped Samantha locate the knobs on her chair, so she could bring her hips into proper alignment. To do so, she had listened to my recommendation on the proper angle. By having her adjust the chair herself, I sought out to accomplish two things. First, she would be better able to find that same knob the next time she independently made the adjustment this time. And it also provided an opportunity to see if she had understood what I had explained about healthy hip positioning. If she was able to bring her hips into an angle slightly greater than 90-degrees, than she was making the connection I had intended. Angles can also be difficult for people to visualize while you are discussing them and they are often more effectively understood by simulating the proper alignment by physically moving the body and equipment.

The last action I took was to inquire about whether she had ever used a head set for phone activities. As a result, Samantha produced a dusty apparatus from her far drawer and some explanation of why she found it cumbersome to use. She was pretty animated about the negative results with using this piece of equipment, so I treaded lightly and communicated clearly. I looped our communication back to the healthy neck alignment we had previously discussed and contrasted it with the risk of holding a phone receiver between her ear and shoulder for periods of time. I sensed from her body

language that she was following the reasoning behind my recommendation, yet not entirely convinced.

Of all her risk factors, this was the most severe and likely to cause her symptoms. I needed a better selling point than proper positioning, as she was not bought in to making a behavioral change based on the education I had provided thus far. Recognizing that we had started this evaluation with her reviewing her job functions, I took a moment to inquire about her level of comfort.

#### Description of Comfort Level

I learned from Samantha that she had been experiencing tightness in her left shoulder and a pulling sensation along the right side of her neck. She also had some infrequent discomfort in her lower extremities, which she explained, “comes and goes and seems to have a mind of its own.” Based on what she told me, I contained myself from not exclaiming “BINGO” out loud. What she had told me was just the information I needed to justify to her why using her head set made a great deal of sense.

I explained the connection between her reported discomfort and the fact that she had been using her phone in an excess of 5 hours per day, most recently. The tightness on the left side of her neck was likely associated with cradling the phone on that side of her head and over time, shortening the muscles on that side of her neck. The pulling on the right side that she described was related to the outstretched position the shoulder and neck maintain while reaching for the mouse for prolonged periods of time. As I explained this to her, I saw the light bulb go off, as she mentioned:

Oh, and I do both those things all the time and always at the same time. When people call me to revise the schedule, I am on the phone and accessing my report with my mouse. I have been doing more and more of that with the recent change in job responsibilities around here. I have been trying to keep up and they just

keep coming and coming. I want to do my best and since the time that I have taken this over, I have been having all of the problems I mentioned to you. It takes me about 2 hours to unwind each night when I go home. I just can't seem to keep up; no matter how hard I try.

She was clearly upset and mostly seeing the responsibility lying with her. I inquired as to whether she had talked to her supervisor about how she was feeling and that she was bringing the stress of her job home with her each night. She got up and closed the door most of the way. In a lower voice, she explained that a recent decision had been made for her to take on the work that four others had been sharing up until about five weeks ago. She says that she had not spoken to her boss and that she first wanted to see if I could help her out before she made a decision as to whether she would approach him.

In response, I encouraged her to share her concerns with him directly. I explained that five weeks had gone into putting her body at risk of an injury. By improving the way in which she completed her work would certainly help, but that alone would likely not be the sole fix she seemed to think it would be for her. I tried to raise some awareness with her that she would likely need to improve the way in which she was working, and address her stress level, if she wanted to restore her comfort level and job satisfaction.

She looked down at the floor and told me that she had worked for this company for 18 years and that this was the first time she had ever considered looking for a new position. I asked her to consider speaking up and determining if there was any way of improving her work situation, especially giving the amount of time she had given to the organization, thus far.

I jotted a few notes on my legal pad and asked her if I could read them aloud. Before I started, I explained that I would like to include something in my report about the concern she had shared with me and that I wanted her permission to do so. Aloud I read:

Samantha expressed concern in being able to effectively complete her scheduling tasks secondary to the high number of revisions that she is continuously required to make to accommodate to the residence and faculty. It is evident by this ergonomic specialist that Samantha's job satisfaction would surely increase if the process for revisions were examined by this department.

Upon reading my scribbled notes out loud, I could tell she wanted to tell me something. I invited her feedback and with tears in her eyes she told me that she was worried about being seen as a complainer and that the word "required" seemed too strong. She then thanked me for being willing to see this as something that might be able to be improved. She explained that she really wanted to do a good job and it was hard for her to ask for help. Based on the feedback Samantha gave me, I made a few tweaks and reviewed my entire list of recommendations with her.

#### Recommendations for Improvement

1. Provide a reading/writing board to be used for scheduling activities on the left side of her workstation.
2. Provide an articulating keyboard, on a straight application, that will allow this employee's mouse to remain immediately to the right of her keyboard. This new articulating keyboard will also serve the purpose of maintaining an appropriate tilt, preventing excessive extension of the wrists while typing.
3. This employee was encouraged to discontinue the use of her footrest. Only those employees that are short enough in stature to not be able to touch the floor with their feet flat on the floor require a footrest.
4. This employee was encouraged to maintain her hips in a slightly higher position than her knees while seated throughout the day. This will allow for some weight distribution into her feet, rather than bearing all her weight in her low back and buttocks.
5. This employee was strongly encouraged to utilize her headset at all times on the telephone. Using the headset will allow both hands to be free for simultaneous keying and/or writing tasks.
6. This employee expressed concern in being able to effectively complete her scheduling tasks secondary to the high number of revisions that she continuously needs to make to accommodate to the residence and faculty. It is

evident by this ergonomic specialist that this employees' job satisfaction would surely increase if the process for revisions were examined by this department.

I thanked her for her time, willingness to be some open with me, and honest with herself.

I gave her my contact information, as usual.

A few days after I dictated my report, I received an email from Samantha's supervisor, Dirk. The email read:

Rachel- I am not sure what role you are playing in Samantha's concerns regarding scheduling for the clinic, unless this is an ergonomic issue. Our executive committee made the decision that Samantha would be put in charge of scheduling and not the clinic supervisor, Mary. Currently we have three people in charge of scheduling, including a front desk person and an LPN. I do not believe that this is an ergonomic issue and will address, as we feel necessary at our executive committee. If Samantha has concerns she will need to address this with Dr. Andy, her direct supervisor. As for moving the scheduling job back to Mary, that will not happen for reasons which we deem necessary for the flow of the clinic. To the best of my knowledge we have fixed the ergonomic issues.

I sense my emotions become heightened as I consider what this manager has made up about whom he thinks I was implying needed to do this work.

#### Sorting Things Out

Apparently from his email, he has associated something about what Mary ought to be doing, rather than Samantha, and I am unclear about how he has made this connection. Also, I realize that Dirk does not seem to be making the connection between Samantha's pain and spending extensive time reworking the scheduling, nor does he seem concerned about the rework.

Maybe it is good that Dr. Andy is her supervisor, as it doesn't seem I would be making much progress with having to work directly with Dirk. It also occurred to me that decisions are made at the executive level here and questions are not to be asked about the

decisions made. I considered how patriarchal this approach seemed and that it was interesting those two men supervise this department and then report to a female director.

Maybe he is just an ass? Does he not care about her at all? Maybe not... I remember receiving a meeting request from him a few months back about ordering some chairs for his department. He wanted to order the best options possible for his employees, "Because they deserved it."

#### Meeting the Needs of the Customer

On the day we were scheduled to meet about chairs, I walked through the receptionist station and announced that I was here to see Dirk, the operations manager of the outpatient clinic. The secretary asked me to walk right on back and that I would find Dirk's office on the opposite end of the building, second from the end. Following her hand signal, I headed back. Upon reaching the office she had suggested, I found a middle-aged man on the phone with his back to me. From my vantage point, I noticed his hair was a bit tossed around and his shirt partially untucked. Without anyway to indicate to him I was present, I looked around for a waiting area and found no promising option.

I had been standing there for about ten minutes, feeling a bit silly just lurking around, when he hung up the phone. I announced my presence and introduced myself. Dirk extended his hand for a handshake as he introduced himself. He explained that he had some money left over in his budget and because the chairs in the clinic were really old, he wanted to replace them. As I walked him through the three chair models, I took notice that he had made no attempt to apologize for keeping me waiting. I explained the three different price points- low, medium, and high- as I noticed his slouched posture and awkward use of eye contact.

I explained the lower priced chair was a great option for people that did not sit very much and simply needed a place to park themselves for breaks or brief seated activities. For example, this was a great option for clinical staff that spent most of their day on their feet with patients.

The medium priced option was the most common office chair ordered used by employees that spent 50-80% of their day seated. This option could be ordered in varying sizes and accommodated very tall or petite people. It was the best seller for the price.

The highest priced chair was intended to meet the needs of employees whom sat exclusively throughout their day and for those employees with some special needs. For example, people with scoliosis could be well positioning in this high-end chair with independent functioning right and left-sided back supports. It was a nice option, when warranted, as the price was markedly steep compared to the other two models.

I reviewed the pricing options with Dirk and provided him the ordering materials that the Purchasing Department would require. He told me that he really wanted to get the order placed before the end of the year, so the money would come out of that year's budget. He also added that he wanted to be able to improve the aesthetics of the clinic. From our conversation and the amount of money he said he had to spend, I assured him that he would be able to outfit 90% of his employees with functional chairs. I left the clinic, taking note of his motivating interests—to spend remaining money in his budget and improve the aesthetics of the clinic. There was no mention of improving his employees' comfort of overall function while working. Using year-end budgeted dollars and improving aesthetics were not the functionally based reasons I wanted to instill in the

organizations' leadership for how to make decisions about equipment procurement. I had a long ways to go with this change in thinking.

### The Privileged at Work

Two weeks latter, I received the duplicate copy of the invoice for Dirk's chair order from Purchasing. Rather than the six low-end chairs for the nurses stations and eight medium priced chairs for him and his other computer using employees that we had agreed upon during meeting, the order depicted two high-end chairs and eight low-end chairs. While this order matched the budget he told me he had to work with, the options that had been ordered shorted him and his staff a total of eight chairs.

I figured the order had been placed wrong, he may have misunderstood my recommendation, and/or he had a change of mind since we last met. In the case we had a misunderstanding, I wanted to take some responsibility. I left a voice mail for Dirk, asking that he return my call. Dirk did not return my call. As I latter discovered by reviewing the monthly orders with the Purchasing Department, both the high-end chairs were delivered to the clinic for Dirk and Dr. Andy's personal use.

As it turned out, Dirk had ordered the most expensive one for himself and colleague, then the cheapest version for another half of his employees. Ironically, he and Dr. Andy rarely spent time sitting in their offices, as they attend meetings most of the day. Like Samantha, the remainder of the worker bees in the department primarily sat most the entire day in their less than desirable options selected by their boss. The other half of the employees were told they would need to wait until next year for better looking chairs. I couldn't even imagine how he went about selecting who was granted a new chair

and whom he expected to wait. But what did it matter to him; He was simply improving aesthetics!

### Making Sense of My Experience

Having processed this prior encounter with Dirk in just a few minutes after reading his email, I strived to provide a well thought out response to his email about Samantha. I wanted to provide some education about the role of the Proactive Ergonomics Program, yet not come across as an ass myself. I did not want to burn a bridge for future work in this area. After all, this guy reported up to the same director that my boss did! And most importantly, I felt obligated to give voice to the needs of the employee, yet leave the ultimate decision up to him and Samantha's direct supervisor, Dr. Andy. I crafted the following email and read it twice before pushing the "send" button:

Hi Dirk- Thanks for your feedback. It is my understanding that since the time Samantha has been charged with scheduling (secondary to staffing / role restructuring); she has been experiencing upper extremity pain and decreased job satisfaction. Both of these matters are within the purview of the Proactive Ergonomic Program. While it is my role to raise the awareness, it is certainly up to your group to determine what recommendations to implement. I appreciate your letting me know that you have addressed the recommendations. Andy- it was nice to have met you last week. Have a great day to all, Rachel A. Leone, MS, OTR, CEES – PEP Coordinator

Having included Samantha, Dr. Andy, and my supervisor, Fran, on his original email, I too included them on my response, as a means to keep the lines of communication open.

Before the day was over, I received the following response from Samantha:

Hi Rachel,  
Thanks so much for assisting me in this area. As I mentioned to you, I met with Andy last week and he is aware that this schedule has become more painful both physically and emotionally. He did give me some suggestions last Friday for people that are constantly changing their schedules and that he has asked me to have them find their own people to fill in the schedule. That is a big part of the stress. Anyway, he hopes the entire scheduling system will go to an automated system in the fall. I'm sure I would have to put all the data in so not quite sure

how that will all work but we will see. Anyway, I thank you so much for your assistance. I pulled out my slant board yesterday when I was reviewing the July schedule with another receptionist as my neck started hurting and that made such a huge difference!! Thanks for your great ideas and support! Samantha

As I read the email, I was pleased to learn that Andy seemed like he would be amenable to addressing her concerns. I appreciated his interest in trying to identify different ways for the work to get accomplished and some of the rework delegated elsewhere. I felt somewhat relieved to believe Samantha may have the support of her immediate supervisor. I was also proud of her for talking with him and asserting her needs. Based on the defensive and conflict ridden email received from Dirk, I began to develop some more sensitivity to what it must be like to work for this clinic. In response to her email, I write:

Samantha-

I appreciate your being honest with yourself and the department with your needs and concerns. I wish each person could be such a great self-advocate. I am glad that you have a supportive team with which you work. Best wishes to you and be in touch anytime! Rachel

I left for the day feeling encouraged by Andy's potential support and preoccupied with Dirk's email.

The following day, I receive the following request from my supervisor, Fran:

Can you pull the report that went to Dirk, for Thursday when we meet? I'd like to see what the language is that may have precipitated the reaction it got.

She thinks I prompted his crappy attitude?! Her lack of trust in my approach is apparent!

I guess she is missing the whole point about supervisors being trained about ergonomic and injury prevention principles, so they can support their employees to become more comfortable, productive, and satisfied. Just when I think I am making some progress as a change agent, I feel like my supervisor is reprimanding me.

I feel like I am being reprimanded; yet I guess she is only questioning me. Did I write something inappropriate? This is fertile ground to make some cultural changes around here and I would like to have her support. I pull out my binder of catalogued ergonomic reports and flip to the clinics section, and then I locate Samantha's report by the alpha order. I skim the recommendations to find the one that I referred to her job role and level of satisfaction. I narrow my focus to the section of the report that my have heightened Dirk's attention; It is the last recommendation I made for Samantha:

This employee expressed concern in being able to effectively complete her scheduling tasks secondary to the high number of revisions that she continuously needs to make to accommodate to the residence and faculty. It is evident by this ergonomic specialist that this employees' job satisfaction would surely increase if the process for revisions was examined by this department.

I know Fran doesn't like conflict and she likely sees Dirk's email as conflictual, which indeed it is. Rather than considering all of the factors that could have elicited the email from Dirk, she assumed my writing was antagonistic. Interesting, yet totally annoying!

Sure, Fran. See you then, Rachel

When we meet the following week, Fran read the report I dictated after seeing Samantha. Upon doing so, she informed that I had overstepped by bounds and that I should not have made the recommendation for the department to consider revisiting the way in which the scheduling was conducted. She recommended that it would have been better for me to speak to Dirk about this, rather than documented it in writing. In response, I simply asked: It would have been better for whom?

Rather than answering me, Fran recommended that I stick to recommendations that revolved around improving employees' comfort and stay further away from the politics and the ways in which the departments made decisions for how to utilize staff.

And it was in this moment when I realized that I was not really going to shift the culture while reporting to Fran. She was not vested in challenging the status quo and wanted to avoid conflict, rather than use it in a productive manner to foster change. She and Dirk reported to the same woman and it was probably not worth it to her to push this one any further. She did not see it as a battle worth fighting (and the battle did not benefit her) and I felt deflated with her lack of support.

As a leader of this preventative effort, I believed it was my role to raise awareness about processes that needed to change, as a means of improving the program goals established. In doing so, I was bound to come across some people that would just assume maintain the status quo. And why should they change? No one was really expecting them to in the end. I felt it was within the purview of the Proactive Ergonomics Program to address the obstacles that were preventing change from occurring. It seemed that what I felt should have been happening and what were actually happening were two different things. After all, Dirk was in a position of power, Samantha was dealing with the ramifications of not being treated fairly, and I felt abandoned. I was bound by the request of my supervisor to back off and frustrated with her apparent lack of support in me.

I was not concerned about what I could do to make her trust and support me more; I was stuck in a place of being frustrated. That frustration seemed to fuel more of an interest on my part of advocating for the “under dog,” while seeing people like Mark as an obstacle. I didn’t feel inspired to work harder; I felt let down and turned off.

It was one thing to try to educate employees about how they can positively affect their comfort, productivity, and satisfaction while working. It is another to establish rapport with the employee so they actually buy into what you are saying, so they can

become actively involved in the change process. Next in the process, comes sharing the information with management. Most were supportive, interested in learning what they could do to help their employees stay injury free, and open to change.

Then there were the Dirks of the world, whom seem to value maintaining the status quo more than serving the employees they supervise. They are in a position of power and exert it freely and in ways that promote themselves and not those around them. They needed education about the importance of keeping their employees comfortable, functional, and satisfied. Then, they needed to be held accountable for meeting these needs. This was the way to get them to see the value in things, other than sticking to one's budget and keeping your clinic attractive.

In order to have any chance with affecting change with the Dirks, I needed a strong leader whom could back me with challenging the status quo. Without this support, I would have little success with those in privileged positions of power.

## CHAPTER SEVEN

### BUILDING KNOWLEDGE

*“Effective leaders understand the value and role of knowledge creation, they make it a priority and set about establishing and reinforcing habits of knowledge exchange among organizational members. To do this they must create many mechanisms for people to engage in this new behavior and to learn to value it. Control freaks need not apply: people need elbow room to uncover and sort out best ideas”*  
(Fullan, 2001, p. 87).

As an Occupational Therapist (OT), I was eager to stay connected within my field. While there were two other OTs working for the medical clinic that my boss, Fran, supervised, I felt really disconnected to them. These two worked at the clinic about five miles away; I saw them only at monthly department meetings or for occasional phone conversations about ergonomic techniques. Within my organization, I had become my own specialized breed of an OT with the Proactive Ergonomic Program and was feeling a bit like a one-woman island, at times.

#### Branching Out

I was enthusiastic about making connections at Colorado State University, where a master’s OT program resided. I volunteered to be the rehab contact for my organization and quickly made connections within the OT program. I had an interest in teaching others what I had learned in my career thus far, and believed that supervising students would be a great way to share experiences. I have also always been inclined to learn, as well as teach. This was one of the reasons why entering the OT field was appealing to me, in that there is inherent teaching with each intervention.

I got my feet wet with supervising one student for a Level 1 fieldwork experience, which is a 40-hour commitment for the student and practicing supervisor. This gave me an opportunity to share the story of the Proactive Ergonomic Program, demonstrate some

individual and small group ergonomic interventions, as well as supervise a project. I appreciated the opportunity to work with this student, and felt that I was able to provide her some first-hand experience with injury prevention practices within the field of OT.

### So Far, So Good

I felt satisfied with my first opportunity to share ergonomic content knowledge with an aspiring professional in my field and that she had expressed that the learning experience was a positive one for her as well. I also felt really proud of getting the ergonomic program up and running and I was none too shy about sharing my experiences.

I considered my way of giving back to my profession, and honoring all of the experience I had gained from others whom had mentored me. I felt a great deal of positive energy when working with my first student, so I continued to inquire about similar such opportunities to supervise additional OT students in the program. And apparently, the OT program was ready and willing to fulfill my interest in continuing my relationship with supervising their students' fieldwork experiences.

I was scheduled to interview a graduate student for a potential clinical rotation with the Proactive Ergonomic Program. This practice of interviewing students was a great component of the fieldwork selection process, and one that was mutually beneficial for both the student and practicing supervisor. Certainly no student would like to be stuck working somewhere they feel there is not a good fit, nor to be assigned a student whom may not best compliment the learning environment.

## A Breath of Fresh Air

In response to hearing a knock at my door, I stood up to respond to the noise. The configuration of my office was a bit oblong and it was difficult to see from where I sat in my chair. The ability to get up from my desk, in response to people inquiring for ergonomic services, was a good injury prevention practice. I liked that it instilled a good habit of getting up from my desk from time to time throughout the day, to take the opportunity to take a mini break from being in my seat, to stand and stretch my legs.

As I approached the door, I encountered a woman whom stood about a foot taller than me and was built like a healthy string bean. She introduced herself as Lisa and that she was interested in learning about the Proactive Ergonomic Program. She knew I was an OT and had started the program, after having interviewed the student whom already had completed a clinical rotation with me the semester prior. As she spoke, I noticed that she did so in a very calm manner and when she walked, she moved very gracefully.

She told me of her experience returning to school to study OT after having studied at Berkeley, been a dancer, and most recently, a message therapist. She wanted to learn more about injury prevention techniques and the area of ergonomics was of particular interest to her. She inquired about my background and how I came to find the field of OT myself. My story was shorter than hers: I had gone straight into OT school from high school and finished my bachelors and masters degrees in 5 years. I had been working formally as an OT for about three years. I had just gotten into graduate school and was studying at Colorado State University myself.

## Finding Common Ground

Building on my enthusiasm for being back in school, Lisa inquired about my graduate studies. She was interested to hear about me combining OT classes with those in Human Resource Development and Education. We connected immediately and we must have talk for over an hour straight before we decided we would find it mutually beneficial to work with one another, in fulfillment of her fieldwork experience. Before Lisa left that day, I remember her commenting that she felt I had a great deal going for my career at this stage in my life. Then she did something that surprised me a little: She asked me if I would share my age with her. While I was caught a little off guard, I offered up: 26.

I learned during our conversation that Lisa was eight years older than me and that she seemingly had a great deal more life experience. It would not be until much latter that I would learn how much I grew to appreciate the life experience she was able to bring to the Proactive Ergonomic Program.

Embarking on my second opportunity to supervise an OT graduate student, I reflected on my role as a mentor. I was reminded of my own student experiences and that the one I completed in ergonomics had been my favorite. I had a strong desire to spend one of my rotations in Colorado, seeking a change from having grown up and stayed for school in upstate New York. I was seeking a change and Colorado seemed like a great place to spend some time.

## Creating Opportunities

The only obstacle I faced was that my OT school did not have any established rehab contracts within the state of Colorado. In my hopes of overcoming this challenge, I

did a little research on outpatient OT settings and began making some calls. My cold call list consisted of fourteen contacts and I left messages for all of them. Only one returned my call. When she did, however, she left me both her office and cell phone numbers. I figured this was my best (and only) chance of securing a rotation in Colorado.

#### Going with the Flow

I ended up completing a level I clinical rotation with that sole person that returned my call. She then offered for me to spend one of my longer, four-month rotations working with her. Having developed a strong interest in outpatient orthopedics, injury prevention, head injury recovery work, and ergonomics, I gladly accepted her offer. In the end, she hired me out of my graduate OT program, I moved to Colorado, and we worked together for about two years. We are great friends to this day.

Based on my good fortune with finding some great people to learn from, I wanted to try to become one of those practicing OTs myself. This was an opportunity to transition from feeling like a one-woman island to an educator. The services I had been accustomed to delivering on my own became teachable moments, both in 1:1 situations and with small groups. In addition, each CSU student in the OT program was required to complete a mini project to fulfill the requirements for their level 1 fieldwork experience.

#### Taking Initiative

Rather than picking a straightforward and relatively simple project, my new student was interested in collaboratively designing a physical fitness program. In the field of OT, we refer to this program development type work as a group protocol. This is a detailed script of how to facilitate a group, with clear parameters for participation, goals, and learning objectives. When this idea floated past me, I was elated. This was not just

any student project; rather it was the type of project that would enhance the Proactive Ergonomic Program and serve the employees' needs with a whole new type of service. We would develop it from the ground up, bringing in ideas from the literature, Lisa's dance background, our OT knowledge of body positioning and biomechanics, as well as any specific needs we might identify within the employee population.

The group protocol was drafted, a variety of individual and group interventions conducted, and the Level I rotation came to an end. Based on a mutual interest in wanting to see the group protocol come alive, Lisa and I agreed to continue our work together. She best described our experiences, with the following excerpt from her review of her time with the program, which she provided to her OT program, as well as to me:

Proactive Ergonomics:  
*An Occupational Therapy Student's Experience of Synthesis!!*

Having spent over 600 hours working with the Proactive Ergonomic Program – two Level I Fieldwork experiences and one full-time summer long Internship, in addition to a semester project for Program Development – I feel I have had the unique opportunity to synthesize the multiple aspects of Occupational Therapy academic and practical training.

I have been able to assist the program's creator and Coordinator, Rachel Leone, MS, OTR, CEES, with developing evaluation tools, on-line visibility for the organization's website, and a conceptual framework for what the program offers in the context of the health system. In addition, I was able to conduct individual evaluations of workstations throughout the hospital, as well as leading group trainings in computer workstation ergonomics and body mechanics.

My stint also has involved the opportunity to develop and implement an employee exercise "Fit Ball" class that we conducted in spring 2004. This program became a qualitative research project to assess the impact of the ball classes on employees' subjective awareness of proper body positioning, or "neutral spine," as well as deep breathing – both of which are cornerstones to healthy computing for long periods of time.

Through the collaborative development of the ball program, it would be possible to supplement one-dimensional interventions, like individual evaluations and group training session. These interventions primarily served employees by sharing knowledge

with others. The ball program created a method for customers to create knowledge of their own based on their bodily experiences and follow-up reflection activities.

By providing a learning context in which employees could practice and receive feedback on their understanding of key ergonomic and postural concepts, such as “neutral spine,” an interactive, kinesthetic activity-based environment can be created. The ball program activities, or exercises, were designed to provide employees a “repertoire” of postural variations that could be adapted to sitting at their workstations. Overall, we believed there were a variety of benefits to participating in the ball program. Some of these perceived benefits included:

- Strengthening “core” musculature – ideal for postural support
- Integrating of whole-body exercises – minimizes repetitive stress
- Improving balance, stabilization, and coordination
- Providing a playful, novel approach to exercise
- Strengthening, toning, and stretching muscles
- Providing an opportunity to exercise without forceful movement patterns and or impact on the body.
- Practicing deep, diaphragmatic breathing in various positions for selective muscle relaxation and overall stress reduction.

For example, a simple pelvic tilt, integrated with deep breathing while seated, can increase circulation and decrease fatigue of the lower back muscles.

### Designing for Fit

This employee exercise program was designed to support the mission of the Proactive Ergonomics Program (PEP), to enhance the well being of its employees, or internal customers, by providing a high standard of care and quality service. Enlisting employees and their supervisors in a proactive approach, PEP provided a framework within which they become “essential team players in the process to improve the culture of the working environment” (Leone, 2001).

## Facilitating Interpersonal Communication

The program was intended to build interpersonal rapport among employees. This was accomplished by encouraging employees to work together, through partnering exercises, such that they develop mutually supportive interactions, in maintaining efficient and safe body postures. And because it was possible for the great majority of exercises could be performed at one's workstation, there was an opportunity for the mutual support demonstrated during class, to be transferred into the work place on a daily basis.

## Efficacy of Employee Exercise Programs

Employee exercise and wellness programs had been widely studied. Griffiths (1996) identified the general benefits found were: prevention and/or management of coronary heart disease, prevention/management of other physical disorders, reduction in work-related stress, psychological well-being, financial benefits to organization, improved corporate image, higher employee morale, decreased employee absenteeism, and increased organizational commitment and productivity.

Of these benefits depicted by the author, those most closely aligned with the goals of the PEP included: prevention/management of other physical disorders, reduction in work-related stress, and higher employee morale. Each of these benefits was taken into close consideration when we developed the ball program for employees receiving workplace ergonomics consultation.

## Purpose

The purpose of this project was three-fold. The first was to offer employees a weekly, low-impact exercise ball program, for basic physical fitness. Second, to facilitate

interpersonal communication among participating employees geared toward mutual support and reinforcement of practicing ergonomic principles of postural alignment and body mechanics. Third, to determine the impact of an interactive Swiss Ball exercise program, an employee wellness class, designed to enhance the goals of the PEP:

- To reduce the cost of work-related injuries and claims, those that can be affected by ergonomic interventions;
- To increase the productivity of employees, thereby decreasing related costs; and
- To improve the satisfaction of employees, those serviced by the PEP.

### Participants

The Outpatient Billing Department was identified through purposive sampling as the department, which had one of the greatest number of employees serviced by the PEP program. Additionally, the Department was conveniently located adjacent to the PEP office, and also adjacent to a large classroom, determined to be the appropriate setting for the exercise ball class. The Department Supervisor identified twelve (12) employees of the Outpatient Billing Department through purposive sampling. Potential participants needed to be available one hour prior to beginning work and have the desire to participate in an exercise ball class. Through this sampling method, we learned that at least one participant at the time had been diagnosed with Multiple Sclerosis. Accordingly, we became particularly interested with ensuring that we would incorporate a way to help participants manage these types of symptoms.

On consulting employees challenged by MS-related fatigue issues, it became apparent that an exercise program that took place later in the day, when fatigue often sets in, might impact their ability to participate. Although some fatigue may be experienced regardless of time of day or quality of sleep the previous night, affected employees felt that early morning exercise would facilitate physical comfort throughout the day by

assisting in reducing early morning muscular tightness, particularly in the lower extremities.

### Multiple Sclerosis

Multiple Sclerosis (MS) is a condition involving the build-up of plaques or scar tissue on the myelin sheath of nerves, thus inhibiting the conduction of nerve impulses (Cooperman et al., 2002). MS occurs almost twice as frequently in women as it does in men, and diagnoses typically occurs between the ages of 15 and 50 years. Symptoms include muscular weakness, sensory changes, impairments of balance and stability, cognitive changes, spasticity, depression, and fatigue. For people with MS who are able to function in daily life activities in the community, such as full- or part-time employment, fatigue is generally considered to be the greatest barriers to participation, as all symptoms tend to worsen with the onset of fatigue.

Dyck & Jongbloed (2000) identified environmental issues related to the employment experiences of women with MS. Rather than using the severity of disease as a predictor of employment status, the authors indicated that resources in the workplace such as assistive technology, job adjustments, social support, and positive reactions of employers and co-workers are more likely to positively impact these women's continued employment.

### Exercise Program Design

In designing this exercise program, the authors asked several potential participant employees to consider what time of day and setting would be most desirable. A general consensus among those asked revealed that having a class before work and taking place

at work would be ideal, as no additional travel would be required and after-work schedules would not be impacted.

## Method

Potential participants were notified regarding the schedule of the exercise ball class (dates and time) and invited to attend the introductory session. They were also made aware of the general precautions for participating in the ball program:

All employees should consult a physician before beginning any exercise program and be aware of discomfort or pain during exercise, resting and seeking modifications from instructor when necessary. Exercise program should occur in a well-ventilated room kept at a moderate (not-too-warm) temperature.

This first session provided details regarding what to expect, including the supplies that would be provided, the general research goals, and subsequent participation requirements. Time was allotted to answer questions and obtain written informed consent for those who wished to participate.

Informed consent was obtained from all participants, to indicate their understanding of potential benefits and risks from participation. Additionally, participants were asked to self-identify with any concerns prior to and/or during the program regarding any physical discomfort experienced. A human subjects committee of the health system's Institutional Review Board approved recruitment, data collection, and confidentiality procedures for this study.

Participants returned for the following six Friday mornings from 7:30am to 8:20am for exercise ball classes. Participants received an exercise ball to use throughout the six-week session, which they were encouraged to take home for practice and/or bring to work for use in exercises and at their workstations that they will be learning during the morning classes.

## Procedure

Participants attended a total of eight classes over the course of five weeks. Classes took place during paid work time, with the approval of the health system as part of an employee wellness initiative, and ran from 7:30am – 8:20am. The exercise ball program was developed to include a 30-minute interactive, exploratory movement component. This component was intended to facilitate interpersonal communication, playfulness, and mutual support for learning a variety of postural concepts. This component followed some basic stretching exercises.

Classes were designed to introduce and provide an experiential learning opportunity for understanding the following concepts of proper body positioning and their role in preventing cumulative trauma symptoms:

1. “Neutral spine”—maintaining the three natural curves of the spine;
2. “Deep breathing” – allowing the belly to relax on the inhale, and contract to facilitate the exhale; and
3. “The Injury Continuum” – an adaptation of the recognized progression between comfort and pain in the development of cumulative trauma symptoms, namely from comfort to fatigue, to discomfort, leading to pain.

During each class, participants utilized the exercise ball for each of the following types of exercises:

1. Warm-up;
2. Strengthening exercises for postural (“core”) muscles, with modifications for increasing or decreasing difficulty per individual need;

3. Interactive / interpersonal movement exercise designed to engage participants in giving and receiving feedback with peers regarding body positioning; and
4. Final progressive relaxation exercise focused on deep breathing and building awareness of tension in the body and consciously releasing tension found.

Music was used throughout the class to set rhythms for coordinated movement and to facilitate relaxation. Participants were responsible for bringing the ball provided by the ergonomics department to each class, and were encouraged to practice using it at home and at work, between sessions, as a seating alternative or for exercise purposes.

#### Capturing the Experience

Participants were asked to journal in an open-ended fashion for a minimum of ten minutes on Wednesday of each week, responding to the following direction: Please describe your awareness of body positioning and comfort in yourself and others.

Participants were also be asked to indicate their general comfort level for that week, using a scale provided to them, as well as the number of minutes outside of the exercise ball class that they have spent using their ball. All journal entries and accompanying comfort scale were provided to employees via email correspondence and returned to PEP Coordinator / Principal Investigator at the end of the six-week session. This allowed each participant to remain anonymous and confidentiality protected.

#### Sharing the Experience

During the eighth Closing Session, participants were provided an opportunity to share their experiences with others, as well as for the PEP Coordinator/Principal Investigator to learn where process improvement opportunities existed, should she decide

to offer the program again. The feedback was entirely positive and several requests were made to continue offering the ball program.

Many participants were able to transfer experiences and learning they gained through participating in the ball program to other areas of their life. Most commonly, participants expressed their ability to utilize many of the new postures while working at their computer workstations. One participant indicated that she was using much improved seating posture while drive her car, as a result of her participation in the ball program.

#### Expected Findings

Several of the participants' reflection entries supported my earlier thinking about how the ball program would likely afford employees a different type of learning experience. Rather than just providing the one dimensional information sharing type intervention, the participants supported the idea that the ball program would afford them first hand learning experiences of their own. One participant illustrated this point when she wrote:

I heard the information when Rachel came to help me figure out what was going on at my workstation; I understood it when I participated in the ball program and could feel for myself what it was she was trying to teach me.

#### Unexpected Findings

And because the ball program participants had learned how to use their bodies and exercise balls in an environment in which they were encouraged to support one another, a wonderful outcome took place as a result! They left the ball program able to help support one another use better body mechanics while working at their desks. They helped each other remember to take breaks from their work, so they could get up and

stretch or walk. They advocated for others in their department whom were unable to attend the ball program. It was amazing to see customers becoming coaches!

And just as I was observing this transition take place in the lives of the program participants, there were other changes taking place. For one, Lisa was transforming from being a student to becoming a colleague of mine. I was experiencing what it was like to be responsible for supervising a student and observing her become an OT professional.

And second, I was growing in my ability to let go of being the leader, the supervisor, and the mentor. I was experiencing the benefit of serving those roles with a collaborative approach. This collaboration led to the creation of the ball program, which resulted in some really wonderful learning for the employees whom participated. I would not have imagined the ball program when I was writing the program proposal, and yet being able to provide this type of service, as part of the PEP, was a wonderful opportunity. I was grateful for the opportunity to work with Lisa, be open to all of her ideas and experience, and let this really neat opportunity emerge. It was a great deal of fun and one that relied on both of our experiences to make it a reality.

In the latter portion of Lisa's letter to her OT program, she indicated that she too felt as though she benefited for our work together. It was with pride I read the remaining portion of her overview of her experience:

Rachel's supervision and mentorship has been invaluable. She has created an important balance between providing guidance and allowing me to take the initiative in certain projects. Her expectations of our time together have always been clearly defined, and her flexibility in response to the inevitable day-to-day schedule and priority adjustments helped us to stay focused and accomplish our goals.

I highly recommend the opportunity to work with Rachel and the Proactive Ergonomic Program for any OT Student who has a fundamental interest in ergonomics, occupational health issues, and program development. It is a

wonderful vehicle for bringing together two years' worth of coursework into a focused, applied experience.

Respectfully submitted,  
Lisa, MSOT Candidate  
September 15, 2004

## CHAPTER EIGHT

### DISCUSSION

*Of course... you come to understand yourself in deeper ways. And with understanding yourself come understanding others. Autoethnography provides an avenue for doing something meaningful for yourself and the world (Ellis & Bochner, 2000 p. 738).*

This autoethnography was focused on my experiences as a new leader designing, implementing, and evaluating a new program within a new organizational culture. I relied on observations within the setting to formulate meaning of what I had experienced while immersed. I captured these experiences by writing extensive field notes for three and one-half years. In doing so, my attempt was to record the moment-to-moment, concrete details of my experiences with leading a change process.

These data were captured in a hard copy or paper format, and filled into three-ring binders for safekeeping. Intermittently, the field notes were read during the time period they were recorded, as a way to reflect on the experiences while they were transpiring. Following the time I resigned my position at the organization, and before I began coding the raw data, the binders were stored. This time period in which the data were stored lasted approximately one year. Having some time between being immersed in the organizational culture and coding and analyzing the data, allowed me to gain some perspective on the experiences. This perspective has helped me to reflect on the experiences, and better analyze them, than if my reading and writing had taken place immediately following the lived experience.

#### Process of Coding the Data

While reading the data, reflexive analysis was utilized to develop individual codes. Each code was documented on a sticky note, which was then positioned off to the

side off the specific field note under review. The primary set of field notes filled two four-inch binders. All of these notes were read repeatedly and coded sticky notes adhered to them, whenever applicable. The first pass through the data revealed approximately two hundred sticky notes, or codes. These codes provided a basis for helping me organize the data.

By reading the data repeatedly, and closely examining the codes assigned, core themes began to emerge. These themes were documented on a legal pad of paper by making a simple list. This list was comprised of approximately two dozen themes.

It became apparent that the next level of coding required making sense of the themes in a way that seemed meaningful. I assigned each of Fullan's (2001) five constructs to a page in my legal pad (Moral Purpose, Understanding Change, Relationships, and Knowledge Building, Coherence Making) and began sorting the two dozen themes onto each of the five pages. Each page was rather equally distributed, with the exception of the final page, entitled Coherence Making. Less of the themes from my set of data seemed to align with Coherence Making than the rest of Fullan's constructs.

Each of Fullan's first four constructs, Moral Purpose, Understanding Change, Relationships, and Knowledge Building, were rather equally aligned with the themes that emerged from my data. At that point, I went back to my complete data set and read it again. During this pass through the raw data, I made notes about some of my specific experiences that illustrated each of the approximate two dozen themes. Some of these were lifted directly from the field notes while others came to mind through the use of the emotional recall technique.

By moving back and forth between reading raw field notes and utilizing emotional recall, I noted these experiences on the same pages of my legal pad which I had initially listed Fullan's core constructs. What I was left with were five pages, each entitled as one of Fullan's five core constructs. Each page then displayed a list of applicable themes and specific experiences, which I felt, brought those themes to life.

#### Process of Analyzing the Data

The process of analyzing the data took place through writing a series of chronological vignettes. The writing was made possible by having conducted thematic analysis for field notes documented at the time (coding process previously depicted) and emotional recall for data that were not documented in real time and were more emotionally intense than other experiences (Ellis & Bochner, 2000).

The emotional recall technique involves using imagery to place one's self back in the situation, by paying close attention to physical details, events, thoughts, and dialogue. This technique allowed me to recall my experiences that tended to be much more emotionally charged. One instance in which I used this technique was while writing the Understanding Change chapter, in which I depict my experiences working with the long-standing EHS employee, Carmen.

I discovered that writing about these types of experiences, even after a significant amount of time had passed, was much more emotionally draining than I anticipated. By placing myself back in that conference room with Carmen and our bosses, I was able to bring specific details back into my consciousness that I had not considered for some time. This technique even allowed me to recall exactly where each person was sitting at the conference table, the color marker we used to write on the dry erase board, and the

feeling that tension was high. It was as if I could feel Tammy's hand on my shoulder while I was recalling and documenting that aspect of the experience.

On another occasion while writing, I took notice of my heart rate speeding up when I wrote about having my graduate student, Lisa; take my pulse during another meeting I described. And what I found interesting was that at the time of my writing the vignettes, I had been removed from those experiences for over three years. I was surprised and intrigued by how much these experiences came alive for me when I was recording them.

By having exposed the reader and myself to my most poignant experiences, I have strived to illustrate them by writing narratives that the reader finds engaging. The use of vignettes in narrative studies is intended to evoke responses from readers by presenting ideas, then allowing them to make sense of their experiences. This leaves the interpretation entirely up to the reader. Accordingly, as a writer, this process of recording my experiences can create generate mixed emotions and thoughts about putting your experiences out there for the reader.

#### Process of Letting Go

Just as I was unable to control how readers would interpret my experiences, and learn to accept this, I also learned to accept that there were some stories that just wouldn't get written this time around. While the majority was incorporated, I chose not to include some of the themes within the vignettes that had emerged from the raw data. In order to determine which themes to represent within the four vignettes, I continually asked myself: Which of my vast experiences as a new leader within this organization are the most important to include or retract? In making these decisions, I paid close attention to

those experiences that seemed to have contributed most to my organizational learning experiences and my role as new leader within the larger culture. Those themes that fell outside the depicted vignettes included:

- The development of standard work: subsequent cost savings and process improvements;
- Transformation process of those whom resisted injury prevention concepts become strong advocates for ergonomics;
- Reporting structure and subsequent challenges;
- Recognizing what leadership styles build me up and break me down; and
- The process and methods used for strategically integrating ergonomic services into other organizationally driven initiatives.

For those themes that I selected to include, it was a fascinating process to build a narrative piece by pulling together snippets of various experiences and/or expanding upon one or two experiences into a more comprehensive vignette. Either way, the experiences were selected because I felt they best illustrated the themes that initially emerged from the data. I made an effort to use as much of the raw data as possible while writing the vignettes. The use of a blocked quote style in my writing signified that text was lifted directly out of the field notes and the material was unaltered.

In writing the vignettes, one activity, which I found rather interesting, was assigning pseudo names to people with whom I interacted within the organizational setting. To keep them all-straight, I kept a mater list of the match between real and pseudo names. It is a rather odd and entertaining activity to rename someone. For example, Shae is depicted as one of the characters with whom I developed a close working relationship.

She is indeed a close friend of mine to this day. When I call her, I sometimes leave her a funny voice mail message and refer to her ShaeShaeBon. I am not really sure how this practice came about; it has just always made us laugh, so I kept it up. So, she

became Shae for the purposes of protecting my friend's actual identity. Kit, the pseudo name for the OHS nurse, is one I imagined up all together. In real life, this character has a rather clever and sassy personality. Kit seemed to fit her style.

It would be safe to say that the writing evoked a vast range of emotions, from the fun of choosing pseudo names, the intimidation of putting my personal thoughts, beliefs and even judgments of others on paper, to the anger and frustration of being treated like crap. Many of these, I attempted to incorporate into the narratives and in a way that would allow the reader to sense the emotions I was feeling. If the experiences I portrayed did not elicit the same types of emotions for the reader, it is my hope that instead, the reader was provided some understanding about how others like me, may have felt in the given situation. If this was made possible, than this autoethnography has lived up to the goal of providing an opportunity for learning to take place, and for developing a greater understanding of people.

Similar to the accounts of other researchers undertaking an autoethnography, the act of putting my stories out there for others to read is truly intimidating. And while I thought I had prepared myself for this by reading all the autoethnographic material I could get my hands on, I had to experience my own writing in order to really develop a true appreciation for the struggle that is presented to one's self by placing the experiences on paper.

I tried not to glorify things that went well and not to over-dramatize things that were frustrating or less than positive to have experienced. In doing so, I found myself conscious of whether I would be perceived as conceded about the positive aspects I was depicting or too dramatic about things that seemed to be a big deal to me at the time. It

really just became an exercise of not over-analyzing how the words I was writing would be perceived. I just put them onto the paper in as naturalistic a way as I thought they represented my true experience.

In documenting my experiences, I think one of the most personally tenuous writing exercises was for me to try to convey appreciation that many employees openly provided to me, as a result of feeling positive results from engaging in ergonomic interventions. While I knew it was important to include this in the vignettes, as it was one of the most rewarding experiences of doing ergonomic consulting work, it also made me feel somewhat awkward in writing about it. Frankly, I was slightly horrified with myself at times. I read what I wrote and realized that at times I sounded totally full of myself.

In response, I had to just let the words be on paper. If I reworked them to sound more humble and joyous, I would not have accurately reflected what I was really feeling at the time: Somewhat full of myself and proud. As if I had made all of this happen on my own...

Here inlays one of the benefits of writing an autoethnography: Learning things about one's self that you may have liked to have been different, developing some self awareness, and facing the opportunity of whether or not to do something about the new found awareness. Even as I type these words, I have a lump in the back of my throat. I feel mixed emotions:

- Embarrassed for acting the way I did at times;
- Grateful for the relationships I have built and friendships fostered;
- Humbled by my new awareness;
- Intimidated about making a change; and
- Thankful for the opportunity to have studied ethnography at this time in my life.

This studying has taught me the benefit of going back and reading one's work and further analyzing the experience. Following suit, this analysis has advanced my self-awareness and brought several realizations and questions to mind. In an attempt to depict this learning and inquiry, I will summarize my findings by retracing my steps back through each narrative chapter, and highlighting several points from each.

And it is worth addressing that the sequence in which Fullan (2001) presented his core constructs was not the same sequence in which my experience was lived. Also, my data set did not reflect similar material to reflect Fullan's final construct- Coherence Making. A list of the core constructs in Fullan's framework, as compared to my lived experience, follows:

- Fullan's sequence: Moral Purpose, Understanding Change, Relationships, and Knowledge Building, Coherence Making
- My lived sequence: Understanding Change, Relationships, Moral Purpose, and Knowledge Building

Accordingly, I presented the material in the sequence in which I lived it: Understanding Change and Moral Purpose concepts chronologically transpired in the opposite order, and Fullan's Coherence Making construct was not fully embodied within my experience.

#### Revisiting my Understanding of Change

It has always come pretty naturally for me to be able to see gaps between the current state of a process and what aspects of that process are not functioning well. In this case, being able to see the way in which patient care was being provided, and the way in which I felt it should be provided, was an opportunity for improvement. Although I would not have called it by name at the time, I was indeed conducting a needs assessment (NA). I had identified what Witkin and Altschuld (1995) referred to as unmet needs.

NAs are predicted on the assumption that groups of people have needs that are not being met or not being addressed adequately. When they are aware of such needs, the awareness is often expressed as demands. When they are not aware, the needs are said to be unexpressed or latent. NAs seek to uncover unmet needs, both recognized and latent (p. 9).

Some of the unmet needs that I identified at the time I was writing the Proactive Ergonomics Program proposal included:

1. Interventions were reactive, rather than preventative;
2. Process improvement initiatives were not considered, as the status quo prevailed;
3. Carmen consistently demonstrated poor interpersonal communication skills, insulting and negative feedback that undermined the efforts of the rest of the team.

I account my ability to see gaps or inconsistencies within a process to my clinical training as an OT. Within the profession, we are trained to observe and interview to determine a baseline of someone's functioning. From there, we identify problems and develop a plan of care. Without really recognizing it at the time, I now see that I have taken that framework and essentially applied it to my administrative role with program development. Rather than assessing the baseline of a person's skills and developing a care plan, I see baseline gaps in performance and areas of process improvement.

One simple example of this within the opening chapter was identifying the process for documenting my initial ergonomic evaluations. Hand-writing my ergonomic reports seemed like a problem or performance gap, in that the ergonomic information never reached the physician in time for them to act on the recommendations, it was time consuming for me to hand-write them, and a waste of the next person's human talent for them to type them up (given they were geared as a scheduler without any requirement for typing skills).

Identifying that writing reports was an inefficient process, and then brainstorming some more effective solutions, is work that I find both interesting and seems to come naturally for me. While I think the success was in part, doing my homework to demonstrate the cost and efficiency improvements involved in making a change to using a dictation system; It was even greater the result of being in a culture where innovation and process improvement were accepted. I recognize that I have been fortunate to have a boss willing to entertain my idea of changing the way in which the reports were documented and saw the benefit of making a change to our documentation process. I was not able to see this as clearly while I was immersed in the culture.

I naively thought that the harder I worked, the more success I would have with designing, implementing, and evaluating a successful injury prevention program. This was evidenced in the Understanding Change chapter in several instances. For one, I wrote, “Autonomy suited me well” when depicting the style in which I was preferred to work (p. 42). I was pleased that my boss, Fran, afforded me the ability to work independently and direct the injury prevention program as I saw fit.

And my entire experience with Carmen was affected by my working hard not to include her in the process of developing a program more focused on preventing injuries. It is no wonder I was not eliciting her commitment for accepting the Proactive Ergonomics Program, given I was not even interested in eliciting her buy-in. I wrote, “Carmen has resisted my effort to develop and implement the Proactive Ergonomic Program every step of the way” (p. 52). Looking back on the way I interacted with Carmen, I was really doing just the same thing with her as she with me. I was so annoyed by her lack of willingness to consider anything other than what she was doing, that I used

her interest in maintaining the status quo as a means to create more distance between Carmen and myself. Rather than trying to close the gap that I had identified, I was contributing to making the gap between us wider and deeper.

Senge et al. (2000) illustrated this pointed well when he wrote, “I didn’t try to build relationships with the other teachers’ union or with the board. Instead, I worked around them. Most of the time, I felt that I was way out in front of them. I would change things on my own” (p. 426).

What is ironic is that the people I looked to for guidance with Carmen were telling me I was doing a great job in trying my best to work with her. By supporting me, and seeing Carmen as a huge resister and generally a difficult person, I was regularly being justified in my approach that Carmen was someone I needed to just deal with and continue working around as best I could. While it cannot go without saying that Carmen was a difficult person to work with, it really should not have been acceptable for me not to have even expected to learn to work with her. I think I would have learned more effectively how to really work with folks like Carmen if I had received some constructive feedback for what I could do differently and an expectation to change my interaction style. I don’t think this would have been comfortable for me to have experienced, yet I think I would have been better off for it.

I mean, that’s life right? There will always be people with opposing ways of thinking and opposing communication and leadership styles. When those differences create challenges, the real skill is being able to work with them, not around them. I now recognize that I could have done a much better job of trying to engage Carmen, rather than disengage her.

I now believe that my inability to engage Carmen, was in part, related to the circumstance that I was seeking guidance from people with communication and leadership styles too similar to that of my own. Accordingly, I believe the feedback I was being given generally reinforced my own cognitive patterns, rather than challenged them. As a result, I felt I was doing the right thing by trying to put up with Carmen and her difficult ways, rather than learning to do work more collaboratively, and considering what changed would have been needed in my approach. I had perspective, yet from folks that saw things the way that I did. I needed some different perspective and didn't know enough to seek it out.

### Revisiting Relationships

In contrast to the relationship depicted with Carmen in the Understanding Change chapter, the Relationships chapter illustrates a great deal of positive experiences. Some of those included employee interaction, supportive managers, working with graduate students, and establishing an effective working relationship with Sallie. Having struggled and failed to collaborate with Carmen, I understood the importance of having an effective working relationship with Sallie and worked diligently to facilitate my part in the development of our relationship. Some of the results of our positive working relationship included more job satisfaction on my part- "This is the way the process should work- professionally, supportively, and effectively!!! Yahoo!" (p. 74); improved collaboration- "Good-bye triage form, hello teamwork! Can't thank you enough, Sallie" (p. 74); and support and recognition from our leadership- "Makes me smile- thanks for including me on this Rachel!" (p. 74).

There were also a few things I took particular notice of when interacting with Sallie. The group interaction, in which we were all listening to the pompous and boisterous man ramble on and on, was one instance of particular interest to me. In observing her interaction, or lack thereof, with this man whom was talking all about her department, rather than extending her the professional courtesy to allow her to speak for herself, I was indeed learning. I wrote, "Sallie opened her mouth wide as if she were going to say something, then like a crocodile snapped it shut. To my surprise that was the end of her effort to interject, and chatter box kept right on reeling away."

And I was truly surprised. I actually couldn't believe that she just sat there and kept listening to him. Her passive approach was alarming to me. By her not interjecting, I was learning that Sallie and I were really different. I was sitting there in awe, thinking that she must not have the courage to say anything to him or that she was just not interested in wasting her breath dealing with him at all.

While I am quite certain that her reason was much more aligned with not wanting to deal with him, I find it interesting that the thought process about her not having enough courage came to mind for me. In looking back on this situation, I have learned that if I were in Sallie's shoes in that situation, I likely would have jumped in on him and challenged him. I probably would have treated him like he ought to be put in his place for so rudely talking over me and representing my program as his own.

I think this would have been my response because this is what I had found myself doing one or twice with him in the past. It was like getting into a conversation where I was trying to redirect him, and he was not catching on the least bit, and just kept taking and talking. It felt like being stuck in the same room with an incessant jack in the box. No

matter how many times you try to close the lid, the damn thing would just pop back up again. Ugg!

By observing Sallie keep her mouth shut, she certainly didn't do anything to affect his presumptuous manner, nor get him to stop or take a break from talking. She didn't even try. She just let him rattle on and appear like a total ass. I can't say that keeping quiet made her any less frustrated that he acted like a jerk. What it did improve, though, was her credibility with the rest of the group, not to get sucked into the game of pushing that jack in the box lid down over and over again. She certainly got my attention.

Clearly, I had a few things to learn in the way of not getting sucked into this type of response by learning to keep my mouth shut more often. I've done some reflecting on what I observed, and how it relates to my interactions with others. I have come to the realization that I am generally quick to offer up my thoughts, opinions, and even provide unsolicited advice. While I am well intended, I would imagine my good intentions might not be felt by the person on the receiving end. At the core of this matter, I think I often impose on others more than I should.

Sure, there is something positive to be said about the ability to influence others, especially if it relates to influencing them to make a positive impact on themselves or others. I certainly need to have the skill of influence at work while working as an OT, a facilitator, and educator. However, there is a difference between meeting their need at the time they express that need, and crossing over into pushing something onto someone. This is an area where I would like to become better at using my influence skills, yet not overuse them. I need some better balance with this- I need to talk less and listen more. I

am likely missing out on a great deal of learning and experiences by overly asserting what I think.

### Revisiting Moral Purpose

I believe that this sort of thinking has, at times, lead me to be somewhat polarized in my thinking. For instance, within the Moral Purpose chapter, I wrote about being frustrated with my boss' lack of confidence in me. I highlighted, "I was not concerned about what I could do to make her trust and support me more; I was stuck in a place of being frustrated" (p. 102). This frustration seemed to fuel more of an interest on my part of advocating for the "under dog," while seeing people like Mark as an obstacle. I didn't feel inspired to work harder; I felt let down and turned off. Trying to make some sense of this, I reflected on the following:

I realize that my communication skills are strong with the employees I am serving. I am able to establish immediate rapport with them, use a sense of humor and approach learning in a collaborative manner. I take their feedback into consideration and attempt to build my recommendations for improvement to specifically address their needs.

It seems I run into some trouble when I am advocating for the program, challenging old ways of thinking, like those with Carmen and Dirk. Maybe I use a different style of communication in these instances? Perhaps the therapeutic relationship is one I feel confident with, yet the more business-like style required of my administrative role is where I need to do some fine-tuning?

Considering these possibilities, I checked in with one of my closest mentors. She too had made a transition from patient care to an educational administrator role about a decade ago. She also had a great deal more working and life experience than I did. I inquired with her about her experiences and received some insights:

When you transitioned from providing direct patient care to administration, did you ever experience this dichotomy in communication styles that I believe I am experiencing?

I understand exactly what you mean. It's not only the difference patient care and administration; it is also that when you are providing patient care, you are the authority. As the health care provider, you are the one with the knowledge to share with the patient, unchallenged. In your role as an administrator, you are seen as the one person within the organization that has specialized knowledge about ergonomics, however, you have no real authority. You will be continually challenged. This requires a different set of skills.

I reflected on the different set of skills that I thought she was referring to and this brought me back to the concept of influence. I had no power or authority, simply influence. I considered my experiences working with patients, employees, and students and acknowledged that in those instances I was, by the nature of my role to educate, in a position of authority. I also realized that it was not my style to approach employees or students with an authoritarian leadership style, rather a more collaborative style.

It occurred to me that while working with employees and students, I viewed my role to be more of a mentor and facilitator of the learning process. I did not feel the need to control things or prove myself as important- like I often did as the aspiring administrator.

#### Revisiting Knowledge Building

I think one of my better instances of utilizing a collaborative approach was evidenced with creating the ball program for employees with Lisa. We learned from one another, balanced each others' strengths, and the results were really exciting. I was able to offer more of a variety of services to employees by welcoming Lisa's ideas for the ball program. The idea to develop an exercise ball class was entirely hers from the beginning. It was her idea for a school project. Then, together, we worked with the idea to shape it into something meaningful to her, the employees we sought to serve, and the Proactive Ergonomics Program.

This would be one instance in which I did not feel like I had to impose my ideas or wishes onto another person. The development of the ball program just flowed from our collaborative work together. While it was a great deal of effort, the experience flowed nicely and the outcome was really awesome for the employees whom participated. Many of them reported having experienced varying degrees of personal change, though their learning and incorporation of preventive, ergonomic principles at work. It was also an exciting experience for Lisa and I to share in the development together as OTs, with the employees, and to reflect on the possibilities of using what we learned in alternate settings.

Through this and similar experiences, I have come to believe that I may be taking the therapeutic relationship and my educator role somewhat for granted. For one, building rapport with people is a skill that comes naturally for me. I think that I have growing up in the restraint business to thank for that skill set! My mother bringing my sister and I to the farmer's market when we were very little and giving us some small change to spend wheeling and dealing with the farmers also reinforced this. We came away with bags of fruit and veggies and this was an early lesson in being outgoing and friendly.

I think what I have taken for granted is that the employees with whom I was working, as well as the students whom expressed interest in interning with me, did so because they wanted to be part of the Proactive Ergonomic Program experience. They wanted to prevent injuries from occurring in their bodies (employees) and to learn how to prevent others from experiencing an injury (students). This was a tremendously enriching work environment and this aspect of the program coordination that I believe I did not appreciate enough.

I was much more interested in learning about power, politics, and influence in my work place (organizational change). I was happy I was helping people stay healthy (personal change), however, I was drawn to participate in activities that would sell the program, increase awareness about the improvements that could be seen through the efforts of a successful injury prevention program, and I was curious about the organizational climate. I still am very interested in those things and doubt that interest will escape me.

However, if facilitating process and educating people come more naturally to me, and I feel more at home in myself, as opposed to constantly pushing or overly engaging my self with administrative type functions, than why not facilitate and educate? Is that essentially what I should be focused on while serving an administrator role anyways? Can I still do this type of work and not over assert myself? Have I had a big enough dose of the political environment to fill me up, so I can get back to focusing on the actual customers in the process? I think this may be more of what my mentor meant when she said that only being able to influence others requires a different skill set?

I think I have certainly learned a great deal about what I can continue to work on and fine-tune, so that I can become more effective in my professional work, as well as better contribute in my personal life. These questions have afforded me the opportunity to begin discovering for myself what seems to come more naturally for me, what seems to create more or less of a personal struggle within me, and what role(s) may be worth (re)considering in the future. I have always thought that blending teaching with consulting would be a great way to spend my future. Maybe that future will become a reality sooner than I once considered...

## EPILOGUE

*An 'experience of the experience' intended to inquire about its possible meanings and values in a way that rides the active currents of lived experience without fixing them once and for all. Understanding is not embedded in the experience as much as it is achieved through an ongoing and continuous experiencing of the experience  
(Ellis & Bochner, 1992, p. 98).*

With my head full of ideas and my heart full of gratitude, I sit for last time in my second bedroom typing. The various binders, pads of paper, and sticky notes are separated into small piles on the queen-sized bed. I find myself organizing my thoughts as I hunt and peck the keys. In this effort, I learned to get beyond having everything written out before I load it into the computer. I think about how planned out that approach was and that it used to be a requirement for me to think on paper, process what I had written, then type what seemed more like a final product than the initial pen and paper activity.

Now I just sit on the bed with two pillows behind my back for support. One rolled up to provide some lumbar support and a third, thinner one under my knees to take the pressure off my spine. I ponder what I will do with this room when all of my writing materials are no longer strewn about the bed and giant sticky notes posted on the walls.

Maybe I will use it as a meditation and exercise room? I have been sitting on my butt a great deal for the past four years and it would be a nice break to simply move around more often. That would be one way to honor my injury prevention efforts and keep my energy flowing. With such a connection between the mind and body, maybe I will use this room to explore the ability of being able to more readily let things go if I keeping my body in motion more: To promote more of an easy way about me, and create less stagnation.

I guess that word, stagnation, is a good way to explain what I was experiencing while collecting the data for this manuscript. I was getting stuck in the feeling of what was otherwise normal frustration, seemingly too close to the issues at hand, and overall lacking perspective to do anything different. I was unable to take a step back and see the bigger picture of what was going on around me, within me, and between others and me. During these times, it was as if I were looking cross-eyed at a situation and trying to make sense of it.

Reflecting on this concept brings me back to the importance of being away from the data for a while before trying to analyze it. One of the benefits of having some time pass between data collection and analysis, is to allow the autoethnographer to avoid getting caught up only in the emotion that was felt at the time of recording the field notes. This is intended to allow for more clearly and well thought out analysis of the data, as the researcher is able to get around the emotional situation, rather than remain stuck in it.

I have the great autoethnographers to thank for that advice- namely Ellis. I asked her about this when I made the trip to Florida to visit with her while writing my proposal. My conversation with her was a wonderful experience and could be a dissertation topic in and of itself!

I can't imagine what it would have been like if I had tried to analyze the data sooner than I did. I let an entire year pass and I now recognize the importance of the lapsed time. I can't imagine that the product of my writing would have been worth much of anything to me or others, if I hadn't been away from that lived experience for some time. I am hopeful that my taking some advice from one of the most amazing

autoethnographic writers, has translated into an opportunity for the reader to take ideas away from this manuscript.

This distance away has also allowed me to recognize how important it is to move slowly in order to speed up. I didn't have any sense of this from the start, entirely underestimating how long it would take to see progress with the change process. During the time I was trying to make sense of this, I emailed colleague of mine:

I appreciated our conversation about trying to appreciate the baby steps. I know your frustration about wanting the research process to move along quicker, all too well. I remind myself almost daily to pace myself. I think that because we see things as an opportunity for improvement and that we are so excited about our work, that it seems the process for development, implementation, and evaluation should go faster. It has been an amazing experience for me to build the Proactive Ergonomic Program from the ground up. I sensed from our talk that you feel very much the same way about your efforts to bring a more formal research process to the organization. I hope you are able to be proud of your hard work, even if it has taken longer than you would have imagined. Thanks for sharing your thoughts with me, as exchanging stories helps me gain greater perspective, which is so important to me at this time. All the best, Rachel

I had been working hard for some time and running my butt off, however, I wasn't making the best use of that energy. I could have been working smarter, not harder. Smarter would have meant really learning to understand the change process through others that could guide me, pave the way for the program and me. Rather than me thinking I needed to do the majority of work on my own and figure things all out for myself, I could have done a much better job building and relying on collaborative relationships.

Here in lays some of the differences I learned to appreciate through my lived experience, as compared to those depicted by Fullan (2001). While Fullan portrayed five distinct and consecutive components, my experience differed in several ways. First, the order in which his five components of Moral Purpose, Understanding Change,

Relationships, Knowledge Building, and Coherence Making were presented did not represent my lived experience. Accordingly, my experience and subsequent vignettes were depicted in the following order: Understanding Change, Relationships, Moral Purpose, and Knowledge Building. While I contend that the process of Understanding Change and exercising Moral Purpose go hand-in-hand, it was more naturalistic of my experience to depict the piece on Understanding Change first in the sequence.

The second difference between my lived experience and that of Fullan's (2001) framework is that building effective working relationships was both a defined process and one that transpired each of the vignettes. It was important for me to parallel Fullan's dedication of Building Relationships to an entire chapter, as well as thread them throughout the entire manuscript.

Lastly, Fullan's fifth component, Coherence Making, did not appear as a consistent theme in my data. While there are likely a variety of reasons for this phenomenon, I believe the overriding root causes are 1) I was not emerged in the culture quite long enough (three and one half years) to have worked through the complexity and ambiguity of hard to solve problems and 2) I was a new leader within the culture and may not have been as effective at working through this ambiguity, as compared to a seasoned leader with more experience.

*So in the end, there is no end. There is simply more to learn.  
Rachel Leone Marx, 2007*

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