

09/03/2004

**UNDERSTANDING STRESS REDUCING
ADAPTATION IN THE WORK PLACE**

by

Claire Henshall

A thesis submitted in partial fulfilment of
the requirements for the degree of

Master Of Science

(Occupational Therapy)

University of Cape Town

March 2004

The copyright of this thesis vests in the author. No quotation from it or information derived from it is to be published without full acknowledgement of the source. The thesis is to be used for private study or non-commercial research purposes only.

Published by the University of Cape Town (UCT) in terms of the non-exclusive license granted to UCT by the author.

Declaration

I, Claire Frances Henshall, hereby declare that the work on which this thesis is based is my own work (except where acknowledgements indicate otherwise), and that neither the whole work nor any part of it has been, is being, or is to be submitted for another degree at this or any other university.

I empower the University of Cape Town to reproduce for the purpose of research either the whole or any portion of the contents in any manner whatsoever.

Signature:

Date:

Abstract

This study describes how a group of managers working for a large retail company in Cape Town managed their work occupations (i.e. all their ordinary tasks at work) in order to adapt to the demands of the work environment. The purpose of the study was to gain an understanding of stress-reducing adaptation in the work place.

The study describes (a) participants' adaptation strategies, (b) the factors that enhanced or inhibited their adaptation, and (c) the outcome of this adaptation process.

A qualitative approach, primarily a collective case study method, was used to explore the adaptation process. Three methods of data collection were used to obtain information. These were (a) observation of the participants as they carried out their work tasks, (b) questionnaires, and (c) in-depth semi-structured interviews. The data was analysed using the explicative content analysis method and also elements of grounded theory methods of analysis.

The results revealed three themes, namely avoidant, action-focused, and learning and purposeful occupational performance. Each theme describes a specific style of occupational behaviour aimed at managing the demands of the job.

The study demonstrates how people adapt through purposeful action and critical reflection within a social context.

Acknowledgements

I wish to thank the following people without whom this research would not have been completed.

The participants of the study who shared with me their valuable time and who displayed an inspiring passion for their work. Thank you for your honesty and commitment.

Jill for sourcing such enthusiastic participants. Your assistance in this regard is highly valued.

My two supervisors, Lana van Niekerk and Ruth Watson – a better combination would be hard to find. Both of them provided inspiration, stimulation and direction when needed.

All my classmates encountered over the two years of coursework. Special mention must be made of Hanske Flierenga and Janet Whelan, who started this journey with me and who both, in their special way, helped me to complete it.

My family and friends, especially those who spent many hours checking for errors. Any remaining mistakes are my own.

Last, but by no means least, my husband, who contributed the original inspiration and continued to provide support and honest feedback, despite the wailing.

Contents

	Page
Abstract	iii
Acknowledgements	iv
Glossary	vii
Chapter One: Introduction	
1.1 Phenomenon of interest	1
1.2 Evolution of the study	2
1.3 Purpose of the research	5
1.4 Aim of the study	7
1.5 Purpose statement	7
1.6 Objectives of the study	7
Chapter Two: Literature review	
2. 1 Human occupation	9
2.2 Occupational adaptation	11
2.3 Stress in the workplace	18
2.4 Working life in South Africa	20
Chapter 3: Methodology	
3.1 Method of inquiry: general	21
3.2 Method of inquiry: applied	22
3.3 Data collection	24
3.4 Analysis of data	30
3.5 Post analysis phase	33
3.6 Trustworthiness	34
3.7 Subject considerations	36
3.8 Limitations of the study methodology	39
Chapter 4: Introduction to the participants and work context	
	41
4.1 The participants	42
4.2 The job	43
4.3 Environment	

Chapter 5: Results

5.1 Introduction to the study themes	47
5.2 Introduction to the model	47
5.3 Theme one: Avoidant occupational performance	51
5.4 Theme two: Action focused occupational performance	68
5.5 Theme Three: Learning and purposeful occupational performance	81

Chapter 6: Discussion

6.1 Introduction	92
6.2 Discussion of study themes	92
6.3 Discussion of model	93
6.4 The influence of causal conditions	94
6.5 Enablers of adaptation	96
6.6 Barriers to learning	101
6.7 Importance of learning in work settings	103
6.8 Learning and stress reduction	104
6.9 Adaptation within a social context	105

Chapter 7: Conclusion

7.1. Researcher assumptions	110
7.2 An enhanced understanding of adaptation	114

Chapter 8: Recommendations

8.1 Recommendations for further research	116
8.2 Recommendations for the company	117
8.3 Recommendations for occupational therapists	117
8.4 Recommendations for individuals	118

References	120
-------------------	-----

Appendices

Appendix one: Information sheet	127
Appendix two: Consent form	130
Appendix three: Questionnaire	131
Appendix four: Job description	136
Appendix five: Questions for interviews	139
Appendix six: Introduction to the informants	146

List of figures

Figure one: Avoidant occupational performance	50
Figure two: Action-focused occupational performance	67
Figure three: Learning and purposeful occupational performance	80

Glossary

Occupational performance

“Occupational performance reflects the individual's dynamic experience of engaging in daily occupations within the environment.” (Law and Baum, 1994, in Position paper: Occupational performance: occupational therapy's definition of function, 1995, p.1019)

Adaptation

“Adaptation is a change the person makes in his or her response approach when that person encounters an occupational challenge. This change is implemented when the individual's customary approaches are found inadequate for producing some degree of mastery over the challenge.” (Schultz and Schkade, 1997, in Christiansen and Baum, 1997, p.474)

Occupation

“An occupation is a specific individual's personally constructed non-repeatable experience, i.e. a subjective event. An occupation has shape, pace, beginning and ending, shared and solitary aspect, a cultural meaning and an infinite number of contextual qualities. Each person interprets his or her own occupations.” (Pierce, 2001, p.164)

Stress

“The individual’s general reaction to external demands or stressors.

Stress results in psychological as well as physiological reactions.”

(Christiansen and Baum, 1997, p.605)

Work

“A category of occupation in which the individual engages for the primary purpose of subsistence.” (Christiansen and Baum, 1997,

p.606)

Purposeful occupational performance

“Occupational performance that is goal directed.” (Christiansen and

Baum, 1997, p.602)

Job

“A paid position of employment.” (The Oxford Paperback

Dictionary, 1994)

The social context:

The social environment is “those social systems or networks within which a given person operates; the collective human relationships of an individual, whether familial, community or organisational in nature.” (Christiansen and Baum, 1997, p.604)

Chapter One: Introduction

1. Phenomenon of interest

Adaptation and its role in reducing stress at work is the concept explored in this study. Not enough is known about the link between adaptation and stress within natural work contexts. Yerxa et al, (1989, in Thorén-Jönsson et al, 1999) suggest that adaptation is an important concept requiring further exploration by occupational therapists. They believe that it is necessary to investigate occupational therapy's potential to use its unique ideas about human occupation and its transformative power. Spencer et al (1998, p.483) write that there is a role for occupational therapists "to collaborate with individuals within a work context to consider alternative ways of adapting to job demands and thus expand the range of possibilities in their lives."

1.1 Adaptation and its role in occupational therapy

Hagerdorn (1995, p.131) identifies three key purposes of occupational therapy:

- Enabling the individual to become more proficient in occupations
- Enhancing occupational performance to achieve optimum function and personal satisfaction
- Empowering the individual to achieve meaningful and realistic life goals.

She suggests that these three purposes are put into practice by means of six core processes, one of which is adaptation. Enabling or empowering individuals, groups or a community to adapt their occupational performance is therefore a means by which occupational therapists can achieve successful treatment outcomes. In order to do this successfully, occupational therapists have to understand in more depth the process of adaptation and its link to stress.

1.2 Evolution of the study

The human resources director of a large clothing company in Cape Town was approached with the idea of studying stress-reducing adaptation. The study was welcomed because area managers working for this organisation had reported:

- High stress levels
- Difficulty completing daily work tasks in the time available
- Problems balancing the demands of home and work life.

A stress management course had been commissioned to address these problems and all the area managers attended the course. However, there was little indication that they were implementing the lessons learnt. The area managers were therefore a good group to study to gain insight into their adaptation strategies within a natural context.

1.2.1 Clinical experience

Most occupational therapists have had experience of a client who is unable to change behaviour in response to problems encountered.

Sometimes the reasons for this are clear, for example, the need to learn new skills. At other times resistance to change is more puzzling. Kegan and Lahey (2001, p.85) believe that resistance to change is often not the result of inertia or opposition and that, in fact, many people demonstrate a commitment to change. They write that an inability to adapt stems from complex conditions, such as underlying assumptions.

This study was interested in uncovering the conditions that prevent changes in behaviour.

An inability to transfer theory into practice coincided with my own clinical experience as an occupational therapist facilitating stress management courses for people with mental illness. Cole (1998, p.120) criticises the usual occupational therapy approach to teaching time management. She believes that occupational therapists advocate strategies to deal with stress that they are unable to implement themselves. She refers particularly to the use of strategies such as daily schedules, lists of goals and activity planners. The study idea was, therefore, to better understand how naturally occurring adaptation, as opposed custom-made programmes, impact on the experience of stress in the workplace.

1.2.2 Stress and work in South Africa

Statistics collected during 2003 at the insurance company where I work indicate that stress related conditions are the third highest category of disability benefit claim in South Africa. In many cases the reasons given for the claim were multifaceted. Based on my experience working in the insurance industry, some common themes relating to working life in South Africa impact on such claims. These are:

- Complex work situations

New labour laws and a relatively unskilled labour force make interpersonal relationships at work and the management of staff stressful, especially for those in managerial positions. Many disability insurance claims for stress-related conditions contain descriptions of conflictual work relationships that influence the severity and duration of disability.

- Struggling economy and high unemployment result in decreased job security
- Exposure to high levels of violence and crime at work.

South African health sector workers experience one of the highest levels of incidences of violence in the world. This conclusion is based on a World Health Organisation survey (2002), which reported that 61% of South African health sector staff had been

exposed to at least one incidence of physical or psychological violence during 2001.

High exposure to stress and violence at work has a detrimental effect on the South African economy according to an article in the *Sunday Times* (2002). Stress-related illnesses such as migraines, bad posture and mental and physical fatigue result in high absenteeism. A stressed core of between 5% and 20% of employees accounts for 80% of lost productivity in South Africa. Vaida (2003) writes “work place violence and stress rob economies of working days and increase other costs like increased security measures, health care and long term rehabilitation.”

The results of this study contribute to existing information on how work stress might be addressed.

1.3 Purpose of the research

1.3.1 Value of research to the company

Schultz and Schkade (1997, in Christiansen and Baum, 1997, p.476) believe that one reason for examining how people adapt their occupational performance is that a “personally meaningful intervention focused on the internal adaptation process will be more efficient and the outcomes more likely to be generalised to other contexts than an intervention focused on general skill development.”

Findings and recommendations generated by the study could be used to assist the company where the study took place to develop training

programmes that are more cost effective and relevant. Work organisation strategies that people actually use were identified. This information could be used to make training programmes more realistic. The findings illustrated both successful and unsuccessful adaptation, thereby improving understanding of the process.

1.3.2 Value of research findings to occupational therapy

Study findings contain a description of a process of adaptation. Conditions both internal and external that brought about change to a person's behaviour are given. General principles of adaptation uncovered in the exploration of the topic could provide guidelines for therapists to empower individuals and groups to adapt what they are doing to enhance the potential in their lives.

At the same time the study findings demonstrate how successful occupational performance promotes adaptation in work settings. Fidler (2000, p.99) suggests that occupational therapists explore the "rich potential of doing an occupation." I believe that ideas uncovered in this study show this potential.

The wider application of principles related to human occupation are also shown. This study demonstrates how occupational therapists could move away from traditional medical settings and apply their knowledge about human occupation in other work areas. Results demonstrate how occupational therapists could shift occupational therapy practice away from a narrow focus on remedial therapy. Budget cuts in the health

service in South Africa have resulted in occupational therapists struggling to obtain employment and when they do they must then compete for funding. The study results can be used to explore the use of principles of human occupation more broadly.

1.4 Aim of the study

The aim of this study was to depict through the chosen cases how a group of area managers, working for a large retail company in Cape Town, used and managed their work occupations to achieve adaptation. The adaptation process described occurred within the context of their particular work category and work environment.

1.5 Purpose statement

The purpose of the study was to explore adaptation within occupational performance. New ideas generated were used to conceptualise a hypothesis about adaptation strategies used to reduce stress in the workplace.

1.6 Objectives of the study

The objectives of this study were to describe the:

- Work occupation and environment in which the work occurred
- Demands that work placed on the participants
- Adaptation strategies that participants used in response to the demands of the work environment

- Factors that enhanced or inhibited the adaptation process
- Outcomes of the adaptation process for participants.

Chapter Two: Literature review

This literature review provides background information on adaptation, as it is understood within occupational therapy and other literature.

Occupational therapy's understanding of occupation is discussed. Next the concept of adaptation is explored, along with the notion of coping strategies. Lastly, the literature review provides a framework for understanding stress in the workplace and its effects.

2.1 Human occupation

The concept of occupation is understood in a number of different ways within the profession of occupational therapy. The term is unfortunately associated with many ambiguities and idiosyncratic interpretations. In order to contextualise this study, it is important to address these.

Many people use the word occupation to denote an identity that describes what they do, as in "I am a painter" or "I am a lawyer". This is often a description of their paid work. For the purpose of clarity, this study differentiated between the individual's *work occupation* (paid work or job), and *occupations* more broadly. When using the term *occupation*, I use a broader definition that includes everything a person does during the day, of which the paid work component is but a part.

2.1.1 Definition of occupation

The American Occupational Therapy Association (AOTA) position paper (1995, p.1015) on occupation defines occupation as the "ordinary and

familiar things that people do every day.” The statement continues by saying that this simple explanation “reflects but understates the multidimensional and complex nature of daily occupations”. Pierce (2001, p.164) writes “an occupation is a specific individual’s personally constructed non-repeatable experience i.e. a subjective event. An occupation has shape, pace, beginning and ending, shared and solitary aspect, a cultural meaning and an infinite number of contextual qualities. Each person interprets his or her own occupations.”

The AOTA (1995, p.1015) clarifies the complex nature of occupation by assigning the following qualities to occupations:

- “[They have] both a performance and a contextual dimension in that they involve acting within a defined setting.” (Christiansen, 1991; Nelson, 1988; Rogers, 1982)
- “They extend over time and have temporal dimension.” (Kielhofner, 1977; Meyer, 1922)
- “Engagement in occupation is seen to be driven by an intrinsic need for mastery, competence, self-identity and group acceptance and therefore has a psychological dimension.” (Brown, 1986; Burke, 1977; Christiansen, 1994; DiMatteo, 1991; Fidler and Fidler, 1977, 1983; White, 1971)
- “They are often associated with a social or occupational role and are therefore identifiable in the culture. They have social

and symbolic dimensions.” (Mosey, 1986; Fidler and Fidler, 1983; Frank, 1994)

- “They are infused with meaning within the lives of individuals and have a spiritual dimension. The word spiritual referring to the non-physical and non-material aspects of existence.”
(Clark, 1993; Mattingly and Fleming, 1993)

Nelson (1997, p.12) defines occupation as the relationship between occupational form and occupational performance. Occupational performance means the doing of the occupation while the occupational form is the format or thing that is done. Nelson (1997, pp.12-13) believes that a “person is able to change his or her nature by engaging in occupation and this is what is called occupational adaptation.”

2.2 Occupational adaptation

It is important to contextualise the term “adaptation” by understanding what occupational therapists know or assume about it.

Thorén-Jönsson et al (1999, p.353) point out that occupational therapists have a long tradition of working with people with disabilities in order to facilitate adaptation in daily living. They give examples of active, purposeful participation in occupations, provision of adaptive equipment, and alterations to the environment. These interventions are underpinned by knowledge of how people adapt to a changing environment and how internal changes affect their capacity to act on the environment. (Yerxa, 1987 and Yerxa et al, 1998, in Thorén-Jönsson et al, 1999, p.354)

Frank (1996, p.50) describes adaptation as “the process of selecting and organising activities (occupations) to improve life opportunities and enhance quality of life according to the experience of individuals or groups in an ever-changing environment.” In this definition the importance of individual choice and control over the process is emphasised.

Schultz and Schkade (1997, in Christiansen and Baum, 1997, p.458) add to that understanding by stating: “Individual adaptation involves a transaction whereby the interface between intrinsic factors, e.g. abilities, personal values, motivation, and external factors, e.g. the built environment, cultural traditions and social rules and expectations, are negotiated. Occupational performance is the product of the individual’s ability to reconcile these factors. The way in which these factors are organised represents individual adaptation.”

Townsend (1997, p.20) writes that change occurs within the active process of occupational performance and that there are four features of occupational performance that are important in order for us to transform ourselves. These are: ordering what we do in time and place, learning, discovering meaning and exercising choice and control.

2.2.1 Common concepts within adaptation

Schultz and Schkade (1997, in Christiansen and Baum, 1997, p.469) reviewed occupational therapy literature and recorded 10 themes, concepts and assumptions related to the phenomenon of adaptation and the adaptation process.

These are:

1. Human beings have an innate urge to affect the environment.
2. Adaptive facility and environmental expectations are predictive of the person-environment transaction.
3. People like to experience mastery in person-environment transactions.
4. Person-environment transactions occur in the form of occupations.
5. A perception of mastery results from the goodness of fit between the adaptive facility and the expectation.
6. Demand for adaptation appears when the fit is inadequate.
7. Adaptation is a form of change which occurs in
 - Sensory-motor, cognitive or psychosocial skills
 - Adaptive responses
 - Physical, social or cultural expectations and demands.
8. Mastery of expectation yields satisfaction.
9. The experience of joy resulting from being a successful agent of change fuels the urge to affect the environment.

10. Mal-adaptation is an unsuccessful attempt to meet expectations.

2.2.2 Adaptation outside of occupational therapy literature

Outside of the occupational therapy field, adaptation is often referred to as “coping” and is acknowledged as an important aspect of an individual’s response to stress (Cox, 1994, p.20). Lazarus (1966, in Cox 1994, p.20) investigates individual coping strategies and argues that the person “usually employs both task- and emotion-focused coping strategies.” In the former, individuals use some form of action targeted at dealing with the source of stress. In other words, they try to change their environment. In the latter, the person tries to give feedback into the appraisal process and thus alter the individual’s perception of the situation. This study illustrated how these categories are interrelated.

There are many classifications of coping systems in the literature, and they are not included here. Most emphasise that one strategy is no better than another. Work relevant to this study includes that of Miller (in Cox, 1994, p.21) who identified two informational styles of coping, namely those used by “blunters” and those used by “monitors”. The former tended to “use denial strategies and the latter information-seeking strategies in response to stress.” This study illustrated the importance of using learning to adapt to stress.

2.2.3 A model of adaptation outside of occupational therapy literature

Albert Bandura identifies six core features that enable people to “play a part in their own development, adaptation and self-renewal”. (Bandura, 2001, p.1)

These are:

1. Intentionality
2. Forethought
3. Self-regulation through self-reactive influence
4. Self-reflectiveness about one’s capabilities
5. The quality of one’s functioning
6. Meaning and purpose of one’s life pursuits.

All six are illustrated in the results of this study.

Bandura (2001, p.1) believes that self-agency – that is “the capacity to control one’s own functioning and events” – is a crucial aspect of adaptation. He believes that personal agency operates within a broad range of sociostructural influences.

He identifies three types of agency:

1. Direct personal agency

2. Proxy agency that relies on others to act on one's behalf to secure desired outcomes
3. Collective agency exercised through socially coordinated and interdependent effort (Bandura, 2001, p.11)

The findings of this study illustrated the importance of the social context in relation to adaptation. In other words, both proxy and collective agency were found to be critical factors in successful adaptation to stress.

2.2.4 Adaptation and its relationship to health

This study utilised a broad definition of health and considered health to be more than just the absence of disease. This definition is echoed in the following two quotes, both of which emphasise the need for individuals to adapt to achieve healthy outcomes.

The Canadian Association of Occupational Therapists quotes Epp (1997, p.120) as follows:

“In order for people to reach a state of complete physical, mental and social wellbeing an individual or group must identify and realise aspirations, to satisfy needs and to change and cope with the environment.”

Hartweg et al (1990, in Law, 1998, p.83) defines health as:

“Personal fulfilment, an adaptive response or the capacity to perform to the best of one's ability demonstrating flexibility in encountering the challenges of life and integrated functioning.”

2.2.5 Studies examining the concept of adaptation

Although much has been written about coping during times of transition, this study was interested in establishing how people cope on an ongoing basis, rather than in response to a major stressor, such as bereavement or disability. In relation to this Cox (1994, p.5), acknowledges that most of the stress encountered at work is "chronic rather than acute".

Most of the studies reviewed considered how individuals respond to specific stressful events. A search of the literature revealed three studies, similar to this one, investigating coping or adaptation strategies.

Dewe in Cox (1994, p.20) examines sources of stress and coping amongst ministers of religion in New Zealand. He identifies five coping strategy clusters, namely: seeking social support, postponing action by relaxation and distracting attention, developing greater ability to deal with the problem, rationalising the problem, and drawing support through spiritual commitment.

Thorén-Jönsson et al (1999, p.353) study how a group of individuals with poliomyelitis managed their everyday occupations to achieve adaptation. They identify six general groups of adaptive strategies, namely: utilising physical capabilities, influencing emotions, altering patterns of occupations, promoting concrete problem solving, influencing relations, and facilitating future activities.

Larson (2000, p.269) examines the routines of a group of mothers of disabled children. He investigated how the mothers managed and

organised their everyday occupations to fit their values of being good mothers. He discovered eight processes which assisted this group to orchestrate their daily occupations, namely: planning, balancing, organising, anticipating, interpreting, forecasting, perspective shifting, and meaning making.

2.3 Stress in the workplace

2.3.1 Definition of stress

A number of models have sought to explain stress. This study uses the work of French et al (1982, in Cox, 1994, p.14) to understand stress. These authors formulated a theory based on the concept of person-environment fit. Two basic aspects of fit were identified. Firstly "the degree to which an employee's attitudes and abilities meet the demands of the job." Secondly the extent to which the "job environment meets the employee's needs and in particular the extent to which individuals are permitted and encouraged to use their knowledge and skills in the job setting." French et al (p.14) argue that "stress is likely to occur when there is a lack of fit in either or both these respects."

2.3.2 Sources of stress in the workplace

Daniels et al (2002, p.3) summarise the sources of work stress as follows: "poor relationships at work, lack of role clarity, little control over work environment, high work demands and poor physical working environments." This list was helpful in developing the questionnaire used in this study to obtain contextual information.

2.3.3 Effect of stress on work and health

Cox (1994, p.62) states that there is evidence to suggest a link between stress and changes in behaviour and physiological function. Smith et al (2000, in Daniels et al, 2002, p.3) describe a link between work stress and the "quality of working life, work motivation, work performance, short term sickness absence and anti-social work behaviours."

However, when considering the link between stress and health, the strength of evidence can only be described as moderate. This is because many of the studies utilised a methodology that was not valid or rigorous, according to Cox (p.62).

2.3.4 Cost of stress in the workplace

Figures taken from a survey conducted in Britain in 1995 indicated that "ill health stemming from work related stress is the second biggest cause of occupational ill health." The same survey reports that half a million people experienced work related stress or stress that they believed made them unwell. Five million people felt "very" or "extremely" stressed. It was estimated that work related stress cost society approximately £3.7 million pounds a year. (Health and Safety Executive, 2003)

Similar figures are not available for South Africa. Statistics on the spectrum of occupational diseases are limited. The information available originates from the insurance industry where reporting is biased because the number of privately insured individuals is relatively small. Vast sectors of the population, domestic employees for example, are not covered. It is

therefore impossible to say to what degree and at what cost stress is affecting working life in South Africa. But there is no doubt that stress related diseases are on the increase. The reasons for this were explained in chapter one.

2.4 Working life in South Africa

In order to locate the business where this study took place within the South African context, I conclude the literature review with some details of working life in the country. According to the Health Systems Trust (1999) 14 million of the adult population in South Africa are economically active. The community, social and personal services sector (public sector education and health) is the major employer in this country. The two other major employers are the manufacturing industry at 12% and the wholesale and retail sector, where this study took place, which provides work for 12% of those employed.

Statistics for 1993 indicate that the majority of places of employment are large private companies with more than 200 employees. The company in this study matches this profile.

Chapter Three: Methodology

3.1 Method of inquiry: general

3.1.1 Rationale for choosing a qualitative methodology

A qualitative methodology was chosen to match the purpose of the study, that required the generation of new ideas about adaptation. A research methodology that was able to capture a diverse range of experiences best answered the research question. The methodology chosen allowed for the fact that people interpret meaning in different ways.

3.1.2 Rationale for choosing a case study design

A case study research design was utilised, specifically a collective case study as described by Stake (in Denzin and Lincoln, 1998, p.89). Thus several cases were examined jointly in order to enhance understanding of the adaptation process. Creswell (1998, p.62) suggests that a case study design could be used to “illustrate the issue”.

Stake (in Denzin and Lincoln, 1998, p.91) writes that many social scientists “have emphasised case study as exploration leading up to generalisation-producing studies, or as an occasional step in theory building.”

The topic “adaptation” is a large one. The model developed from the results of this study is a first step in an ongoing exploration of the subject.

3.1.3 Outcome

The main outcome of this study was a description of a variety of ways in which people manage their work occupations to achieve adaptation and so manage job demands. This information can be used to assess and promote adaptive behaviour in individuals who are experiencing similar life stresses.

Knowledge of the internal adaptation strategies of the participants in this study will inform future training programmes commissioned by the company concerned. This will help make these programmes more meaningful, effective and focused on the actual difficulties employees face.

3.2 Method of inquiry: applied

3.2.1 Population

The population studied was a group of five area managers working in a division of a large retail clothing company. The total population (n=5) participated in the initial stages of the study. To contain the scope of the study, one group of employees doing the same job in one division of the company was selected. Creswell (1998, p.64) writes that it is important to decide on the boundaries of the case.

The company was chosen for practical reasons in that it was accessible to me and interested in the results of the study.

Participants were considered “experts” in that they experienced stress at work and worked in an environment that placed demands on their ability to cope. They were able to comment on and demonstrate the adaptation process. They were considered to be information-rich with regard to the topic. Stake (in Denzin and Lincoln, 1998, p.102) suggests that a variety of cases need to be found to illustrate the phenomenon. Each participant revealed a variety of different adaptations to work demands.

3.2.2 Sampling for in-depth interviews

In the second part of the study, purposive sampling was used to select participants for the in-depth interviews. Information derived from observations and questionnaires was used to select participants (n=3) who showed different perspectives on the adaptation process. (Creswell, 1998, p.62)

Demographic information obtained from the questionnaire informed the sampling process. This included the participant’s age, marital status, number of dependants, level of education, and length of work experience. Participants were selected who reflected a variety of different lifestyles. To ensure that the sample used different adaptation strategies, participants’ answers to such questions as “How do you handle stress in the workplace?” were examined.

During the period of observation a questionnaire was completed, in order to get to know the participants better. Time spent with each participant informed the selection process for the interviews. The observation period

was used to evaluate which participants showed the ability to be reflective about their work. The study design required participants who were able to think critically about their adaptation to work demands. Participants who were able to articulate their thoughts most clearly were selected. This resulted in the best illustration of adaptation possible.

This quote from my journal illustrates the reasoning behind my sampling process for one interview candidate.

I needed to decide whether it was necessary to interview a woman to ensure that my sample was representative. I asked myself whether women adapt differently to men in the work place. In the end I decided that this could be the subject of another study and that gender was not a particular factor in this case. I decided to select Charles as the third candidate to participate in the interviews. He had worked in the job for a number of years, but had told me during the observation that he had recently changed his behaviour at work as he had found that his old style of coping was no longer effective. I think it would be interesting to hear more about this.

(Journal, 28.07.02)

3.3 Data collection

Three methods of data collection were used: a questionnaire, observation and semi-structured interviews. Throughout all phases of data collection I kept a journal, which served as a record of bias and ensured trustworthiness.

3.3.1 Questionnaire phase

The retail industry and the participants were unfamiliar to me at the beginning of the project. For this reason, it was decided that information about the participants and the job was needed. A questionnaire (see Appendix 3) was developed that recorded:

- Demographic details to assist in a full description of the participants
- A job description
- Participants' responses to the job
- Individual styles and different adaptive strategies.

The purpose of the questionnaire was to:

- Obtain a description of the participants
- Increase understanding of the participants' thoughts and feelings about their work
- Give an indication of diversity within the sample to aid in sample selection for the interview phase
- Indicate different types of adaptive strategies used by the participants
- Indicate the occupational profile of the participants

- Develop further areas to be explored during the in-depth interviews.

Two individuals piloted the questionnaire in order to increase reliability and validity. They were not part of the study and were selected on the basis that they were also in middle-management positions and had similar work profiles. They were sourced via the human resources director at the company. Following the piloting of the questionnaire, a few minor alterations to the questions were made. I completed the questionnaire with the participants (n=5) rather than have them complete it on their own. The two subjects who piloted the questionnaire were brief in their answers. I felt that my presence would help the participants expand and explain their answers.

3.3.2 Observation phase

A period of observation, in which the entire population (n=5) participated, was conducted. Each participant was observed for one full day, from 8.30am to 5.30pm. A day was spent working in a store with a store manager. Insight was gained into the demands faced by the participants at store level.

At the end of each observation period, a record of my general impressions, biases, analytical ideas and references as well as personal impressions and feelings were kept in my journal. This practice is suggested by Bailey (1982, p.261) and is important in this type of research

as the observer is “part of the action” and any feelings, ideas and analysis contribute to the data.

The purpose of the observation phase was to:

- Enable me to familiarise myself with the work context
- Increase my understanding of the work occupation
- Observe how the area managers carried out their work
- Increase my understanding of the environmental factors that impact on the adaptation process
- Identify any coping strategies the participants used in response to work demands.

This period also served to increase my rapport with the participants.

The observation occurred in the natural work setting and was overt, as the participants were aware that they were being studied. I was concerned that this would influence their behaviour, but it was felt this awareness was necessary for ethical reasons. A note from my journal during the observation period illustrates how the participants responded to this form of observation. It also illustrates, in part, how they might adapt to other “disturbances” in their work environment.

The job studied is a very people-orientated one and interactions with others constitute the majority of time spent on the job. They are used to having people shadow them at work and, in fact,

Charles commented on how common this is in the course of his work. I was expecting it to be difficult for the participants to act naturally, but they all seemed relaxed about having me around. They did alter their behaviour in response to my presence during the observation period. The information collected does not totally reflect how each area manager works. I found that they preferred me to become involved and talked a lot to me and explained what they were doing. This was also because the environment and the retail industry were unfamiliar to me and it was necessary for me to ask lots of questions. (Journal 30.06.02)

These circumstances led me to reflect on the accuracy and value of the information collected during the observation period.

If they did alter their behaviour, is this a problem? Aren't they then exhibiting the positive adaptation to others coming into the work environment that can be used to illustrate the case of effective adaptation? (Journal 02.07.02)

Half hour intervals were used to record the chronological order of events and each participant's behaviour. Specific data that related to the phenomenon under study was also recorded. The following trigger questions were used to guide the recording of information.

- Where the action took place
- How did the context affect behaviour?

- Who was present in the action?
- The nature of interpersonal relationships between actors
- Ordering and organising of work tasks
- Factors that intruded on plan and deviation from plan
- How many tasks were completed?

Towards the end of the observation period, it was noted that no new information had emerged from the data. A decision was made that one day of observation per participant was sufficient.

3.3.3 Interview phase

Following purposive sampling, three selected participants who reflected a variety of experiences were asked to participate in semi-structured interviews.

The purpose of this phase was to:

- Clarify issues raised in the questionnaire
- Explore in greater depth and elicit further discussion around the phenomenon under study
- Identify the process of adaptation
- Identify the outcome of this adaptation process for the participants in the study.

Semi-structured interviews were used to collect data and explore issues. Following analysis of the observation and questionnaire data, a list of questions was developed in order to obtain additional information and add depth of understanding (the interview guide is included as Appendix 5). A tape recorder was used to record the interviews. The recordings were later transcribed verbatim for purposes of analysis. A transcriber was employed to carry out this process.

3.4 Analysis of data

Although the procedure used for analysis of the data is presented here in a sequential way, the steps described cannot be separated and should be viewed as overlapping.

Four different methods were used to analyse the data. These were:

- Immersion in the data through reading and rereading the transcripts, questionnaires, observation notes and journal
- Explicative content analysis, using existing knowledge about adaptation to identify when it had occurred
- Axial and selective coding to obtain categories and themes illustrating adaptation strategies used by participants
- Elements of grounded theory methods of analysis to identify what conditions gave rise to adaptation, what allowed for changes in behaviour and the outcome of adaptation.

3.4.1 Immersion in data

All the data was read and reread, which ensured that all the information available was well known to me. In other words, I immersed myself in the data. This was a strategy suggested by Krefting (1991, p.231) to ensure rigor in analysis.

3.4.2 Explicative content analysis

Initially an explicative content analysis was used to develop categories using methods described by Mayring in Flick (1998, p.103). The definition of occupational adaptation developed by Schultz and Schkade (1997, in Christiansen and Baum, 1997, p.474) informed this process. These authors defined occupational adaptation (the process) as a “series of actions, internal to the individual, which unfold as the individual is faced with occupational challenge.”

3.4.3 Axial and selective coding

Axial coding uncovers relationships between the categories developed and also contextualised the adaptation strategies used within a conditional structure. (Corbin and Straus, p.127) Axial coding involves a process in which the questions: why, how, where, when and with what result are asked in relation to the categories.

Selective coding for the purpose of selecting the core category and the “story of the case” was “elaborated and formulated to identify the central

phenomenon or theme, rather than a person or single interview.” (Corbin and Straus in Flick, 1998, p.185)

3.4.4 Grounded theory analysis

The occupational behaviour identified during selective coding corresponded to the strategic actions/interactions described by Corbin and Straus (1998, p.133), i.e. the “purposeful and deliberate acts that are taken to resolve a problem and in so doing shape the phenomenon in some way”, as well as the “routines, i.e. the actions/interactions that tend to be habituated”.

In order to answer the research question posed, it was necessary to identify the “conditions” that gave rise to these particular actions. The concept of conditions was used in accordance with Corbin and Straus's (1998, p.130) explanation. Conditions are defined as “sets of events or happenings that create situations, issues and problems pertaining to the phenomenon, and to a certain extent explain why and how a person or group respond in certain ways.”

Conditions would usually be causal, intervening, or contextual.

- Causal conditions represent sets of events or happenings that influence the phenomenon.
- Intervening conditions mitigate or otherwise alter the impact of the causal conditions or phenomenon.

- Contextual conditions are specific sets of conditions that intersect dimensionally at a specific time and place to create a set of circumstances or problems to which people respond through their actions or interactions.

A number of consequences of the action/interaction or lack thereof, taken in response to an issue or problem or to manage or maintain a certain situation, were identified and placed in categories. A range of consequences, some intended, and others not, were identified through the verbatim transcripts. (Corbin and Straus, 1998, p.134)

At writing-up stage, the results were recorded using carefully selected quotes to illustrate my interpretation of the data. These quotes were, "carefully made to ensure adequate representation of the meaning" that I wished to convey and at the same time every attempt was made to "remain true to the voice being quoted". (Du Ploy and Gitlin, 1994. p.271)

3.5 Post-analysis phase

Once the data had been analysed and organised into themes, it was necessary to ensure that the results obtained were an accurate reflection of what was said and done during the data collection phase. To this end, a process of member checking was completed as suggested by Krefting (1994, p.219). All of the participants felt that the description of adaptation was accurate and only minor changes were made to the themes.

3.6 Trustworthiness

Trustworthiness in the study was established by ensuring credibility, transferability, dependability, and confirmability. The information in this section has been informed by the writing of Krefting. (1991, pp.214-222)

Strategies to ensure credibility:

- A record was kept of my own influences and biases in a separate journal. This gave descriptions of how these were worked through during each stage of the process.
- The participants and the work setting of this study were unknown prior to commencement of the research. Rapport needed to be established with the participants. Although this did occur to an extent during the participant observation and questionnaire phases of this research, I am aware that this period was probably not sufficient. This was noted as one of the limitations of the study.
- At each phase of research a process of member checking was conducted – returning to the participants to check that what was recorded accurately reflected what occurred or was said.

Strategies to ensure transferability:

- The small sample in this study limits transferability to other contexts. As the study was exploratory in nature, this was not considered a problem. This study could later form the starting point for a larger study with more participants aimed at developing a

more comprehensive model of adaptation in the work context.

- This research report contains a description of the demographics of the population studied. Contextual information about the work setting is also provided. A balance between providing sufficient information to understand the context and confidentiality was needed.
- The cases described in this study reflected as diverse a selection of people as possible. The varied participants selected illustrated the case from different perspectives. (See Appendix 6)

Strategies to ensure dependability:

- A methods log was kept in the journal to record decisions made and the reasoning behind them.
- Use was made of an experienced qualitative researcher to audit each stage of data collection and analysis.

Strategies to ensure confirmability:

- Triangulation, i.e. a number of different methods of data collection, was used to ensure the accuracy of the data obtained. Triangulation also enabled the depiction of a variety of different perspectives on the case of adaptation.
- As data was collected and analysed, additional literature was consulted to confirm or contrast the findings.

3.7 Subject considerations

The research design of this study was submitted to the Ethics Committee of the University of Cape Town and approval to conduct the study was granted.

The ethical considerations pertinent to the study will be discussed according to the principles of ethical research. These are respect, beneficence, and justice. The information in this section has been informed by the writing of Katzenellenbogen et al. (1997, pp.28-34)

3.7.1 The principle of respect for persons

Prior to the commencement of this study, I met with each of the five participants and discussed:

- the purpose of the study
- the implications of their involvement
- any potential risks they might face.

They were then given the opportunity to ask questions about the study. Each participant read the participant information sheet (Appendix 1) that orientated him or her to the purpose and methods of the study. All the participants communicated well in English, which meant that translation of information was not required. After they had gained a thorough understanding of the research, each participant completed a consent form (Appendix 2).

Participants understood that they did not have to participate in the research if they did not wish to. It was emphasised that non-participation in the research would not have any effect on how they were viewed by their employers or impact on their work appraisals.

Information obtained in the process of the study was restricted to that which would assist in answering the research question. Confidentiality is hard to guarantee in qualitative research because of its nature. Use is made of what people say in interviews to illustrate the phenomenon that is being researched. Each participant was assigned a pseudonym at the beginning of the research process. All quotations were used anonymously within the report.

Use was made of a tape recorder to keep a record of the interviews and the permission of the participants to be recorded was obtained.

Participants were informed that another person would be transcribing the interviews and the pseudonyms used disguised their identity from the transcriber.

3.7.2 The principle of beneficence

Although participants have not benefited directly from this research, neither were they harmed by it. They received no intervention or treatment.

Although, as previously stated, the participants received no direct benefit from the study, it is hoped that their participation led to an increased

awareness of their own actions. Thorén-Jönsson et al (1999, p.359) suggest that awareness is the “the first stage in changing behaviour”.

The research took place during work hours. Every attempt was made to create as little disturbance as possible in the participants' normal work routines. Participation did not hinder their ability to perform and complete their work requirements.

The information obtained in this study was not used to penalise any individual employee. On the contrary, if the company could use it to provide better working conditions and more stimulating and meaningful work opportunities for its staff. Such information will also assist the company in targeting its training strategy towards effective ways of assisting its managers to achieve adaptation.

3.7.3 Principle of justice

The participants received no benefit from the results of the study. However they have a right to know the findings of the study. For this reason, now that the research has been completed, a session to give feedback to all the participants as well as the key stakeholders responsible for the welfare of these employees was organised. Results will also be made accessible to the company for use in future training sessions.

3.8 Limitations of the study methodology

The main limitations of the study methodology were the following:

- The chosen methodology limits the application of the results in other contexts.
- The context was unknown to me and some events may have been misunderstood.
- The methodology of observation made it hard for the participants to act naturally.
- The time available for data collection was limited. The research process was completed within a specific time frame.
- Only limited access to the work environment and the employees was achieved. This was to limit the demand on employees already dealing with many demands on their time.
- Some aspects of the work were not observed for reasons of confidentiality. For example, work appraisals of other staff.
- The study was essentially an exploratory one. The limitation in terms of the length of time spent with each participant meant that saturation of data was not achieved. The topic chosen was a broad one. Results provide an overview of adaptation in this setting. Ideas for further research are detailed at the end of the work.
- The human resources director who initially enabled access to the participants was a personal friend. The participants knew this and this might have influenced what was said and done during the period of data collection. They were aware that results of the study would be

reported to their superiors at the end of the research. Every attempt was made to ensure that the analysis of data was objective and that her ideas did not influence my thinking. This was achieved through journaling.

- At the beginning of this research I had a number of assumptions about adaptation that were recorded in the research protocol. These will be explored in more depth at the end of this study. It is acknowledged that the broad subject matter made a certain number of assumptions inevitable. At each stage of the research each assumption was reflected on to ensure that it was not influencing the work unduly.

Chapter Four:

Introduction to the participants and work context

Chapter Four: Introduction to participants and work context

Note to the reader

For the purpose of clarity, quotes from questionnaires, observation notes, journal and interviews are written in italics. Extracts from the questionnaires, observation notes and journal are identified as such through references in parenthesis following each quote.

Prior to presenting the findings of this study, contextual information about the participants, the job and the work setting is provided to frame the results and enhance reader understanding. A full description of each participant and a job description are provided in Appendices 4 and 6.

4.1 The participants

The participants in this study demonstrated a strong commitment to and involvement in their work. Alice reported a *“passion for what I am doing and I have retail in my blood, as I have a trader mentality.”* (Questionnaire 20/06/2002) Most of the participants rated their job satisfaction as high. As Charles explained, *“I am competent. I enjoy what I do. I don't believe I am doing anything wrong and I am working to the best of my ability.”*

(Questionnaire 25/06/2002) They were able to motivate themselves. *“I come to work because I want to, not because I have to. I look forward to coming to work.”* (Alice, Questionnaire, 20/06/2002) All the area managers were ambitious and had aspirations beyond their current position. They believed that they possessed the necessary skills in order to progress in the company.

4.2 The job

The job was a middle-management position with the area managers working as intermediaries between company management (referred to by the participants as head office) and the stores. In my opinion, the job revolved around two key aspects, namely making profit by increasing turnover and managing people. Tom recorded *“good people skills and driving turnover”* as two of the key aspects of the job. (Questionnaire, 27/06/2002) The results of work were tangible and could be seen daily in the level of turnover achieved.

The job permitted a high degree of autonomy according to the answers the participants gave in the questionnaires. John explained, *“We decide when we want to work and where we want to go. But at the end of the day, you need to take responsibility for your stores and the turnover of your stores.”* (Questionnaire, 26/06/2002)

The participants reported high levels of control over the job but, as Tom explained, *“you are reliant on others, like the store managers, to reach your goals.”* (Questionnaire, 27/06/2002) The job was unpredictable and this meant that not all aspects of the job were under the area managers' control. This extract from my journal illustrated this point:

On three of the five days of observation the area manager being observed had to deviate substantially from the plan for that day in response to an unexpected problem arising at store level. The area managers need to be flexible in their planning in response to this

feature of the job. (Journal, 27/06/02)

The job was physically demanding. There was little respite from activity for reflection. Few of the participants took a lunch break unless this time was used to talk to a store manager about work-related issues.

A number of opportunities were provided for interaction with co-workers at all levels of the organisation. There was disagreement between the participants about the quality of these interactions and this will be discussed in some depth in Chapter 6.

During the course of data collection, the area managers were reluctant to admit to any job-related stressors. John wrote, *"I am not really stressed."* (Questionnaire, 26/06/2002)

Most of the job stressors identified related to factors outside of the individual, such as the *"location of the stores"* (John, Questionnaire, 26/06/2003); *"people's inability to do their jobs properly"* (Simon, Questionnaire 21/06/2003); or *"high levels of crime"* (Alice, Questionnaire, 20/06/2002). In the last example, the fact that the store staff themselves often committed the crimes made dealing with them particularly difficult.

4.3 Environment

4.3.1 Geographical area

The area managers who participated in this study were responsible for stores in the Northern and Western Cape. The area covered stretched from Springbok to George. The stores visited were situated on main

shopping roads, high streets and in shopping malls. During the course of the observation period the researcher travelled with the area managers from Noordhoek to Stellenbosch and most shopping areas in-between. All the area managers made use of a company car to travel to and from the stores they managed. The area managers commented that they enjoyed the fact that they were never in the same place for long and that they were out of a formal office environment.

4.3.2 Regional offices

The area managers used office space in the company's regional office building. Here they made phone calls and used the computer. They attended meetings here with the other area managers, store managers and head office staff. During the period of observation the area managers spent little time in this office space. When I accompanied one of them there we seldom encountered any of the other area managers.

4.3.3 Store environment

This extract from my observation notes illustrates the store environment in which each of the area managers worked:

The area is divided into two sections, the shop floor and the backroom and storage areas. The items for sale are all arranged in the front section and all the stores are laid out in a similar way. Items for sale are displayed in well-ordered rows, some hanging on racks and others neatly folded into stacks displayed on shelves. The area is divided into casual clothes, shoes and more formal

business wear. How the clothes are arranged is called merchandising and each store is responsible for ensuring that the display is in line with company policy. Each store has an area where the tills for the payments of goods purchased are placed. Two staff members stand in this area and others stand on the shop floor waiting to serve customers or rearrange merchandise.

At the back of the store is a storage area where additional merchandise is kept in piles and on hangers. In this area there is a small work surface and storage area for administrative papers. There are facilities for making tea and coffee and a fridge and a safe. The size and layout of this area varies from store to store. In the older stores the area tends to be very small. The merchandise is piled up in big stacks and is difficult to reach. In more modern stores the area is bigger with office space and room to organise the stock correctly. This area is usually where the area manager does administrative work. (Observation notes, 27/06/02)

4.3.4 Cultural environment

The organisational culture was guided by a set of values developed by the human resources department. It was people-centred and focused on the wellbeing of the employees. The area manager team appeared to agree with these values and tried to apply them in their jobs. However, they noted discrepancies when it came to implementing the values and translating them into behaviour. Charles explained the difference between the stated values and people's actions. *"Yes. I agree with the values*

written on paper 100%, but they don't always put the values into practice."

(Questionnaire, 25/06/2003)

Top management seemed to encourage an open style of communication with staff at all levels. Management strove to set clear goals for everyone to work towards. John commented on the effectiveness of this when he said, *"In the past, the organisation used to be very autocratic and top management were very concerned with profit and didn't care very much how they got it. Now they are communicating more with staff. However, the idea of communication has not got through to everyone. Change has not occurred in everyone."* (Questionnaire, 26/06/2002)

The organisation was concerned with making a profit. This was where the area managers thought the organisation was most effective in assisting them to work productively. Alice explained, *"When turnover is down and they need to take action, this is done effectively. They will come up with ideas that really work on the problem and get input from the employees to try and rectify the problem."* (Questionnaire, 20/06/2003)

Chapter Five:

Results

Chapter Five: Results

5.1 Introduction to the study themes

Three themes emerged from the analysis of data. Each theme describes a different style of occupational performance demonstrated by the participants in the study in response to job demands.

The first theme is named **avoidant occupational performance** as in this theme the participants either avoided or postponed tasks or avoided difficult confrontations with others. Habitual, rigid and procedural ways of acting characterised behaviour in this theme.

Theme two is named **action focused occupational performance**. This theme describes occupational behaviour that is focused on the doing component of occupational performance. The person who uses this strategy to cope with job demands does not think before acting.

The last theme is **learning and purposeful occupational performance** because the behaviour described in this theme includes both purposeful action and critical reflection.

5.2 Introduction to the model

See Figures one (p.50), two (p.67) and three (p.80) for a diagrammatic representation of each of the three themes. The abbreviation AM in the diagrams refers to area manager.

In theme one and two, the **style of occupational performance** is shown at the centre of the diagram (labelled A). In these first two themes, the specific type of occupational performance style represents a response to a particular **job demand** (labelled B). For example, in theme one the area managers avoided tasks they found boring and repetitive. This contrasted with theme two where they used action-focused strategies in response to unpredictable events.

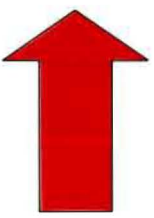
Each style of occupational performance is influenced by **causal conditions** (labelled C). The causal conditions described include both intrinsic and extrinsic factors. Intrinsic factors include "skills, abilities, personality, values and motivation." (Schultz and Schkade in Christiansen and Baum, 1997, p.461) Extrinsic factors include the structure of the job, "the organisational culture and societal rules and expectations." (Schultz and Schkade in Christiansen and Baum, 1997, p.461) The relationship between intrinsic and extrinsic factors produced the adaptive strategies described. For example, boring repetitive tasks were avoided because participants did not value them.

Causal conditions prompted the participants to continue responding in a particular style, unless this was changed by **intervening conditions** (labelled D). Intervening conditions served to alter and mould the described occupational performance, thus enabling different outcomes for an individual. In the example given, a proactive attitude towards repetitive, boring tasks enabled the area manager to complete them successfully.

The interaction between the job demands and the causal conditions and their influence on each occupational performance style had a specific **outcome** (labelled E) for each category of occupational performance described. For example, the outcome of boring tasks remaining incomplete is that work was completed after hours.

All the participants interviewed exhibited the three styles of occupational performance described in each **theme**. However, not all the participants demonstrated or spoke about each **category** of behaviour. In some instances the participants showed **contrasting** perspectives on the case. For example, Tom avoided tasks because he was not familiar with them, whereas Simon did not do administrative tasks because he believed them to be a waste of his real talents. In other instances, two or more of the area managers demonstrated **similar** behaviour. For example, all of the area managers found the administrative tasks repetitive and boring.

C: Causal Conditions	
"Nobody has taught me"	Limited access to information
"They may not notice"	Completion of tasks could be avoided as others did not notice lack of performance
"I've done something now I want to see something positive come out of it"	There was no satisfaction to be gained from task completion as tasks are ongoing
"To me it doesn't make sense for a result driven area manager, profit orientated, sitting down at a PC doing admin tasks"	AM felt that their talents and expertise lay elsewhere
"It doesn't put money in the till"	Task doesn't contribute to that by which success in the job was measured
"You're dealing with the sort of dynamics that fluctuate most, and that's people and emotions"	Interpersonal relationships required skill to manage successfully
"It's too rigid. It's too inflexible. It doesn't allow us to adapt to the situation"	Job and work environment didn't allow for adaptation of behaviour
"Unfortunately it's the way it is so you can't really challenge it"	There were set procedural ways of acting that were well established



D: Intervening Conditions	
"It's also experience, it's something that the more you do"	Practised a task to improve performance
"So I don't get hung up on boring aspect"	Developed a proactive positive attitude to boring tasks
"Changing what it is important for us to do"	Change the emphasis of the job description
"How do you want to change me?"	Obtained insight and help from others to change rigid patterns of behaviour

B: Sub-requirements	
"I can't say I'm authority on it"	Necessary knowledge and skills were missing
"Most of the area managers tend to find the admin a drag"	Boring, mundane, repetitive tasks
"Competitiveness in the industry"	Conflictual interpersonal relationships



A: Occupational Performance Style	
Avoiding occupational performance	
"I tend not to get terribly involved"	Avoided a task
"I'm too busy it will have to wait till later"	Postponed key job tasks
"I haven't had dealings with the person since then"	Avoided conflictual relationships
"I was very rigid and by the book"	Maintained rigid and procedural methods of acting



E: Outcome	
"They tend to ask your opinion"	Expectation that AM would be an expert
"I find of late that I take work home"	Worked after hours
"The admin task has become too big"	Work became uncontrollable and more difficult to start
"Everything was not sorted out"	Difficult relationships remained unresolved
"That's why I've been doing the same job for fourteen years"	Person was not promoted

5.3 Theme one: Avoidant occupational performance

An outline of each of the categories illustrating this theme is detailed in Figure one.

5.3.1 Avoiding a task because of experienced incompetence

A: Occupational behaviour

“I tend not to get terribly involved”

In this first category, one of the participants avoided doing specific tasks he felt incompetent to complete, despite knowing that it was a requirement of the job. Tom was the only participant who utilised this strategy. He was new to the job and had not participated in the in-service training like the other managers interviewed.

In this category Tom described his response when confronted with the task of merchandising (the layout of clothing for sale in the store). *“Because I am not okay with it, I tend not to get terribly involved and it should probably be the other way around.”*

B: Job demands that led to avoidance

“I can’t say I am an authority on it”

The job demands in this category were tasks with which Tom was unfamiliar. He believed that he lacked the necessary knowledge and skills to do these tasks successfully. Tom said: *“I can’t say I am*

an authority on it (the task) like I am with people issues or with finance.”

C: Causal conditions for avoiding tasks

“Nobody has taught me”

Tom avoided learning the necessary skills to do the merchandising task competently in a number of ways. Firstly, he was unfamiliar with the terminology – there are a number of unusual terms in merchandising, such as ‘front-facing arms’ and ‘cascading waterfalls’. Secondly, he felt that he did not have sufficient information, as he had not been taught the basic principles. He lacked the necessary knowledge to complete the task. He said: *“nobody has taught me the basic principles, ‘this is what we do, we never do that, we always do that’.”* Finally Tom lacked confidence in his abilities. He explained: *“It hasn’t been a huge focus or my main thing because I haven’t felt competent in it.”*

“They may not notice”

Tom felt that he could safely avoid the merchandising tasks. He believed that others would not notice his lack of knowledge and skills in this area; thinking *“that most store managers will not pick up on it”* and hoping *“they may not notice and perhaps just think that I was less critical of the store from a merchandising point of view.”*

D: Intervening conditions for avoiding a task

“It’s also experience, it’s something that the more you do”

Tom believed that experience and practice would help him deal with unfamiliar tasks and thus help him to stop avoiding them. He said: *“It’s also experience, it’s something that the more you do and follow the principles, the better.”* He went on to say: *“The more you do it, 10 times, you’ll be better than, you know 11 times you’ll be better.”*

He felt that you learnt the skills necessary to cope with work on the job. *“It’s good to have the theory and the what ifs, and I’m not unhappy to have that. But it’s when you are standing there in front of the customer, when you’re in the store and suddenly have this issue, and you’re actually there having to address it, that you learn.”*

E: Outcome of avoiding tasks

“They tend to ask your opinion”

The avoidance of the task of merchandising created a difficulty for Tom in the work context as the store managers had an expectation that he would be an authority on merchandising. As an area manager, Tom believed that to gain the respect of his staff and for them to trust in his abilities he must be competent in all tasks done at store level. He saw his role one of guiding and advising the staff he managed to do their job correctly. Tom said: *“...the problem is*

that the store staff tend to see you as an authority, even if you don't feel like an authority. They ask your opinion and say, "What do you think?"

Tom's belief that he should "know it all" in front of his staff, maintained the avoidance. Tom failed to gain the necessary knowledge and skills to complete the task successfully.

5.3.2 Avoiding tasks by postponing them

A: Occupational behaviour

"I'm too busy. It will have to wait till later"

The second strategy in theme one showed the area managers postponing key tasks in their jobs rather than dealing with them immediately. Work was not completed by deadlines or was done after hours or on weekends. All the participants in the study, except Tom, demonstrated this strategy.

Simon postponed his personal administration. He said: *"I'm too busy. It will have to wait till later."* During the time I spent observing Simon at work I noted,

There is a large pile of papers on Simon's desk, but every time he starts to work on them the phone rings and there is another crisis that must be dealt with. (Observation notes, 23.06.02)

Eventually after a number of phone calls we left the office and commenced store visits, leaving the paper work for another time. Simon was aware that he postponed the administrative tasks. He admitted: *“The one thing I know I need to work on is my personal admin.”*

Simon appears to lack the motivation to change his behaviour and uses the unpredictable nature of the job as an excuse not to complete work. (Journal, 23.06.02)

B: Job demands for postponing tasks

“Most of the area managers find the admin a drag”

The participants in the study postponed the administrative tasks included in their job descriptions. In the questionnaires, all five of the area managers identified administrative checks as the least enjoyable aspect of the job. Mike summed up this general attitude when he said: *“Most of the area managers find the admin a drag.”* Tasks postponed could be described as mundane, repetitive and automatic. They provided the area managers with limited challenge or contact with other people.

C: Causal conditions for postponing tasks

“I’ve done something, now I want to see something positive come out of it”

Area managers avoided those tasks that did not provide them with a sense of accomplishment. They found no satisfaction in completing them, as they were ongoing and repetitive. Simon explained: *“I’m extremely results driven. I want instant gratification. I’ve done something, now I want to see something positive come out of it.”*

John spoke during the observation about his attitude towards administrative tasks. He said: *It is the same thing all the time. You don’t get any satisfaction from the task itself, you don’t ever get to see the end product. Once you finish with one cycle of checks, you must start all over again, because the next lot are due.*

(Observation notes, 27.06.02)

“To me. it doesn’t make sense for a result driven, profit orientated area manager to sit down at a PC and do admin tasks”

In the opinion of the area managers, the administrative aspects of the job were not an indication of where their real talents lay and this was used as an excuse to postpone them. They believed that their time was better spent doing something more commensurate with their position and talents. The participants all had similar attitudes

about this aspect of the job, but Simon summed it up best when he said: *"To me, it doesn't make sense for a result driven, profit orientated area manager to sit down at a PC and do admin tasks. It's part of the function, but it should be less, not as much as it is now. I'm an area manager for a retail business. I should be in the retail business, not behind a PC."*

"It doesn't put money in the till"

The area managers believed that people and turnover were the key performance areas of the job. Simon believed that administrative tasks could be postponed because, *"it takes up too much time versus being in stores, talking to customers, looking at stock, changing the layout, doing value-added things to put money in the till."* Administrative tasks were avoided because they did not correspond to the way success in the job was measured by others. Tom said: *"In administration, if it's a small thing it's not going to get noticed."*

I noted in my journal:

There is little chance of acknowledgement, increase in status or promotion from completing these tasks on time. (Journal, 13.02.03)

D: Intervening conditions for postponing tasks

“So I don’t get hung up on the boring aspect”

Tom illustrated a different attitude towards the administrative tasks and this enabled him to complete the tasks on time. His attitude was more proactive. *“I’m quite conscientious. I realise that it is part of my job and so I just get in there and do it. Not quickly, because it takes time, but I do it and get a sense of satisfaction from signing it off. Ticking and saying, ‘Okay that’s one less thing that I have to do.’ I don’t get hung up about the boring aspect.”*

“Changing what is important for us to do”

All the area managers felt that the job itself needed to change to accommodate the difficulty experienced completing mundane tasks. Tom advocated a change in emphasis on what was important for an area manager to do. *“My view, and I have said it frequently, is that we need to change the way we do things. It requires not so much me changing what I do as a senior area manager, but changing what is important for us to do.”* He went on: *“the job description is diverse and maybe that is the problem and maybe we have too many stores to be able to get to all of them, but is it also in the way we do things, we could be a lot cleverer with our admin.”*

E: Outcome of avoiding and postponing tasks

“I find of late that I take work home”

Although the tasks detailed in this section could be considered to be less demanding than some of the other aspects of the job, avoiding and postponing them had ramifications for the area managers. Avoidance resulted in working overtime or at night.

Tom explained: *“It’s two nights in a row I am working until seven-thirty.”* Simon demonstrated the impact on his personal life, he said: *“I’m trying to relax, I’m trying to have a balanced life by having friends over, or I am at friends. Now I’ve got to excuse myself and go home. It doesn’t make sense. I think it is a negative thing.”*

“The admin task has become too big”

When work was avoided or postponed, aspects of the job started to become unmanageable. Simon illustrated this outcome when he said: *“I have to drop everything and go and do it now. So yes, it causes me discomfort because it breaks the momentum of whatever I was busy doing. I must stop and go and fix the hole that I have created for myself because I am stuck into something and the admin task has become too big.”*

5.3.3 Avoiding conflict in interpersonal relationships

A: Occupational behaviour

“I haven’t had dealings with the person since then”

In this category, the area manager avoided conflict with co-workers. For example, Charles described an argument with a colleague who he felt had undermined him at work. Although he was angry with the person, *“it was starting to upset me”*, he avoided confronting the person, stating *“I haven’t had dealings with the person since then”*. He justified his actions by minimising the effect of the argument by saying casually *“I haven’t thought about it”* and adding later *“It is a petty thing for me.”*

B: Job demands that cause area managers to avoid conflict in interpersonal relationships

“Competitiveness in the industry”

The area managers avoided conflict in interpersonal relationships. Charles believed that people avoided conflict with others because of the limited number of promotional opportunities available. He referred to this as *“competitiveness in the industry. With competitiveness you will always have stress”*. Simon believed that to be promoted a person needed to be seen as a positive person, not a troublemaker. He said: *“Moody people aren’t going to be very successful in this industry.”*

C: Causal conditions for avoiding conflict in interpersonal relationships

“You’re dealing with the sort of dynamics that fluctuate most, and that’s people and emotions”

Interpersonal relationships at work created pressure that led to the participants avoiding conflict with others. This pressure seemed to amount to office politics. Charles described a situation in which *“things were communicated between two different parties, people communicated to the director what was happening in my store. The story was not the truth actually. I think there was a lot of falseness, nothing candid about it, an opportunity to stab me in the back.”*

Simon commented on the type of social environment in which he worked, saying: *“You’re dealing with the sort of dynamics that fluctuate the most, and that’s people and emotions. People’s emotions are different every day, which then causes stress in terms of moodiness or not adhering to an instruction or just not being part of the team. There’s always something happening. So, because of the people aspect, there is always the up and down movement of dynamics.”*

After the interview with Tom, I reflected on what he had said about conflict in the workplace. I wrote:

I believe that this difficulty in confronting difficult issues at work is in response to the fact that the group feel unable to express a contradictory view to a superior. They fear that the

consequences of this behaviour may interfere with their ability to progress in the company. I got the impression during the course of data collection and through discussion with the human resources manager that this company is in a state of change. They are moving from a management style that was very autocratic to one that values more open communication. I think that the area managers are struggling to get to grips with this new style and are still using old patterns of behaving. They seem afraid to confront superiors because of things that happened in the past. (Journal, 11.08.02)

E: Outcome of avoiding conflict in interpersonal relationships

“Everything was not sorted out”

When this group avoided confronting conflict in relationships, issues remained unresolved. After a confrontation with another colleague, Charles talked about how he had dealt with the situation when he said: *“I probably made him feel better and I achieved what I wanted to achieve”*. Later on in the interview he said: *“But I think somewhere along the line it will come up again”*, indicating that the issue remained unresolved.

5.3.4. Avoiding changing style of behaviour

A: Occupational behaviour

“I was very rigid and by the book”

Theme one includes avoiding making changes to behaviour.

Avoiding change took the form of following set procedures and being unable to change old and repetitive patterns of behaviour.

Actions an area manager took to cope with stress were based on past habits rather than on innovative ways of thinking and acting.

Alice described how she didn't have to *“always think about what I do. I have been doing this job for a long time.”* (Questionnaire 20/06/2002)

Charles described his behaviour in the past as rigid. He said: *“They would never say to me, ‘Charles why are you saying this?’ I would say, ‘Because I say so’, or ‘Because the book says so’. I’m very rigid and by the book, or I used to be very rigid. I’m still according to the book, but now I will explain to people why.”*

B: Job demands

The avoidance of change in style of behaviour was not a response to a particular demand, but a habitual reaction to challenges faced at work.

C: Causal conditions for rigid procedural ways of acting

“It’s too rigid. It’s too inflexible. It doesn’t allow us to adapt to the situation”

The area managers believed that the way the job was structured allowed rigid, procedural ways of acting to persist. Simon articulated this problem when he said: *“Sometimes the systems just don’t make sense to me and unfortunately that is the way it is so you can’t really.....It’s too rigid. It’s too inflexible. It doesn’t allow us to adapt to the situation. The job is very structured in terms of what the outcomes are, how you deal with things, lots of procedures, lots of systems, lots of rules. So you can’t really bend things as you go along.”*

“Unfortunately, it’s the way it is, so you can’t really challenge it”

In most cases, the policies and procedures the area managers implemented were not their own ideas and were beyond their control. One example was the selection of stock available in their stores. Charles said: *“I’ve got to sell the stuff they send me. I wouldn’t have bought it myself.”*

The area manager position was at middle management level. They acted as the interface between senior management and the stores. As mentioned earlier, the area managers found it hard to confront their superiors, and this caused habits to persist. The area

managers felt that the people with whom they worked “are practised in the old way of doing things.” Tom explained: “We’re dealing with a lot of experienced people doing the same thing for 10 or 15 years, but not experienced in different ways of doing things. They say we don’t need to do that, we’ve always done this.”

The area managers were not empowered to challenge this.

D: Intervening factors for rigid procedural ways of acting

“How do you want to change me?”

During the interview Charles described how he adapted his style of managing people. He had become dissatisfied with lack of progress in the job and realised he was not managing his staff effectively. In order to change he sought the assistance of others by asking for and responding to the feedback given. He approached each store manager and enlisted their opinion and support by getting them to suggest how they wanted to be managed. Charles asked them:

“Tell me how to change to be a better manager for you. How do you want to change me?” After he had done this he wrote down a summary of everything they had told him. He then promised them: *“This is what you said to me, this is how you want me to be. I’m going to be like that.”* For Charles, it was effective to make a commitment to change in front of others. This meant that his staff could hold him to his promises and give him feedback on his progress towards adapting behaviour.

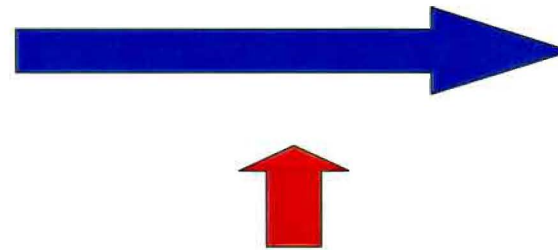
E: Outcome of rigid procedural ways of acting

“That’s why I’ve been in the same job for the last 14 years”

In Charles’s view, he remained at the same level without promotion because of past habits of behaving too rigidly and procedurally. He said: *“That’s why I’ve been in the same job for the last 14 years. If I’d adopted the attitude I have now 13 years ago I wouldn’t be a senior area manager, I wouldn’t be in this position. I would have progressed further.”*

Figure two: Action focused occupational performance:

C: Causal Conditions	
"I'm an action orientated kind of guy"	AM perceived himself to be action focused
"So I'm stuck in the middle always trying to act as a go-between"	AM tried to please a number of different people at the same time
"Do things three times to prove myself"	Need to justify why AM had been promoted
"The job has more facets to it"	The job itself was complex and required action in order to deal with it's complexity
"If I act in this area I can see a difference"	Action focused occupational performance was intrinsically rewarding
"You can't sit still or do nothing in that environment"	The work environment was unpredictable and changeable
"Threatened by shoplifters or customers"	High crime rate encouraged vigilance



D: Intervening Conditions	
"They don't get to all aspects, there's things they just never get to"	Ignored less important aspects of the job
"I just have to stop"	AM took a break from the job
"I laugh at situations"	Used humour to cope
"I use my car time to think"	Used time available to think and plan
"I tend not to overreact"	A calm personality promoted a measured response

B: Job Demands	
"They look at turnover, they look at expense control and those are the focused areas"	Successful job performance indicators
"I take pride in my work"	Pressure that the area managers placed on themselves
"When unpredictable things come up you deal with it"	Unpredictable nature of the job triggered an immediate response



A: Occupational Performance Style	
Action focused occupational performance style	
"Running around like a chicken without a head"	Panicking
"Sometimes you don't have time to listen. You just want to act"	Acting quickly without listening to others or thinking through the consequences



E: Outcome	
"You will also learn to act that way."	Action focused occupational behaviour became the norm
"Because you end up living and breathing your job"	Switching off from work became difficult to achieve
"I know that they (the store staff) know what to do, normal again"	Style of acting enabled AM to feel in control
"I'm on the right track"	Ambitions were realised

5.4 Theme two: Action focused occupational performance

In theme two the area managers adapted to job demands by focusing on the doing component of occupational performance. Actions were an immediate reaction to challenge – the area managers had no long-term plan in place. Adaptation strategies incorporated in theme two included panicking, overreacting and being constantly busy.

A: Occupational behaviour

“Running around like a chicken without a head”

Tom described the nature of this strategy well. He used the phrase, *“running around like a chicken without a head.”* The phrase demonstrates how the person is always busy, but that the action taken to deal with a problem is without direction or forward planning. He went on to say: *“It seems mindless. We have endless meetings about these visits (from senior management), we’ve had endless phone calls, we’ve had faxes flying about...”*. Tom said: *“I think where I get irritated is that changes aren’t necessarily well thought out. Some decisions are made and we overreact this way and that way. If we just thought things through a bit more.”*

“Sometimes you don’t have time to listen. You just want to act”

A milder form of the above behaviour would be to first think about what action to take and then consider the consequences. Of the

three people interviewed, Simon seemed to exhibit this tendency the most.

Simon illustrated this strategy during the course of the interview many times when he spoke about how he dealt with crises at work. When one of his staff made a mistake he said: *"But you haven't followed an instruction through. It's a learning curve for you, but let's not worry about that now, let's just fix it."* He added: *"I think the one thing that comes up in all these scientific assessments, is that I need to listen more. Which is fine. It's a shortcoming, that's no problem. I'll try and work on that skill, but sometimes you don't have time to listen. You just want to act."*

Simon described himself as *"action orientated"* and said he *"struggles to keep still"*. After the interview I wrote:

Simon spoke very quickly, in short bursts, hardly stopping to draw breath; sometimes it was hard to follow his train of thought as he jumped from topic to topic. (Journal 28.08.02)

He said to me during the interview: *"That's forgotten. We've moved on. Things happen too slow with you."* After the day spent working with Simon I wrote

I am exhausted, Simon kept on moving all day today jumping from one task to the next, even when filling in the questionnaire his leg never stopped moving. It seems that he

values an action-orientated type of behaviour and sees it as an asset in this business. (Journal 22.06.02)

B: Job demands for action-focused performance style

There were a number of job demands that caused the group managers to become action-focused. They were as follows:

“They look at turnover and they look at expense control.

Those are the focused areas”

Success as an area manager was measured by how much profit each of the stores generated. Although other performance areas were measured, the profit of the stores was perceived at the most crucial factor for success. Tom said: *“They look at turnover and that is the focused area. If you are down in profit but are developing your staff, I’m not sure if it is going to count for very much.”*

The pressure created by this scrutiny of profit became personal for Simon who said: *“They’re looking at your results. They switch on their PC’s in the morning and see the turnover was down.*

Immediately, it’s not that particular store, it’s Simon’s store. So it’s almost like you have become the business, where it’s not (name of company), it’s Simon’s area. It becomes a personal section of the business. It’s Simon’s area, he’s done well, he hasn’t done well. So it’s very focal. Everyone is always aware of what’s happening.” He felt that this led to an area manager having a personal investment in the outcome of his or her work. *“Sometimes you become really*

emotionally attached to things. Performance in your area is your performance. It becomes a personal attack. Everything always comes down to you."

After the period of observation, I reflected on the issue of profit and each area manager's ability to influence this aspect of his/her work.

Although some of the area managers acknowledge that there are aspects of the job that are beyond their control, such as the economy or what sporting events are on at the weekend, for example, they all believe that they are able to influence the ability of each of their stores to make a profit. Most feel that taking some kind of visible action can influence profit. This is necessary because it is important that they are seen to have some control over these aspects by top management. (Journal 09.07.02)

Tom commented that: *"the progress and the difference that you make is visible and the impact of your role can be seen. In this job you have a platform to show yourself."*

"I take pride in my work"

The next category describes the demands that the area managers placed on themselves. From their questionnaire responses, it was clear that all the area managers had aspirations and ambitions beyond their current position. They saw the job as conducive to achieving those ambitions. Simon, for instance, felt that the fact

that he had a *“lot more responsibility in this job”* would help him achieve these goals. He said, *“I take pride in my work”* and later in the interview added: *“In order for me to get the results and achieve the objectives that I’ve set for myself, I push very hard. I know what I want to achieve and this in turn helps me to move a lot faster than the next guy because people see I have the potential to do things.”*

“When unpredictable things come up, you deal with it”

This immediate response to crisis tended to occur when matters came up at work that were unpredictable – when someone phoned with a query or store personnel had made a mistake. Simon ascribed this reaction to the unpredictable nature of the job by saying: *“When unpredictable things come up, you deal with it. It’s like, this has happened, I don’t write it down and look at it and say we’ll think about it later. Whilst you’re on the phone, you’re already making decisions and saying okay, this is what we should do ... I think this, there’s the course of action. Go and do it.”*

C: Causal conditions for action-focused occupational performance style

“I am an action-orientated kind of guy”

One of the factors that contributed to an action-focused style of adapting to the job demands related to how the area manager saw and understood himself or herself. As Simon explained, *“It really boils down to being really action-orientated. There is enough energy to go around. Believe me I struggle to sit still. I am an*

action-orientated kind of guy.” Alice wrote: “I have passion about what I am doing. I have retail in my blood. I have a trader mentality, which means you have passion for the business, you like the adrenalin to pump and you like to live in the fast lane.”

(Questionnaire 20/06/2002)

“So, I’m stuck in the middle, always trying to act as a go-between”

The job was structured so as to place an emphasis on the liaison function of the area managers. Simon commented: *“I’m like the liaison between stores and head office. So it’s easier for them to phone me. I need to make sure that the stores produce the results that are needed. If we don’t, it’s my baby. So I’m stuck in the middle, always trying to act as a go-between.”* He described this as *“walking a tight rope”* as he needed to *“keep my staff happy”* and at the same time keep *“Head Office happy. If they want it, I get it.”*

“Do things three times to prove myself”

During the time spent with Simon, he spoke of some *“uneasiness”* he experienced with colleagues. He commented: *“It was never easy from the start. We were misfits. The old boys’ club versus the youngster, not married. It was like, what do you know?”* And later he said: *“There was a culture shock as well. I’ve got a different way of talking, different way of doing things. I’ve got to adapt to your lingo and ways of doing things. It was like two different worlds.”*

Although he did not directly refer to the issue here, Simon was talking about his concerns that he might be seen as an “affirmative-action appointment.” He wrote: *“Working with colleagues, I feel I have to prove myself all the time and do things three times to prove myself, because I am a threat. There is sometimes an indifferent behaviour towards me in comparison to the others. I think it is because of my age and background, for example affirmative action. I like to be liked for who I am. I don’t think they see all that I am doing that led me to being promoted quickly. So they don’t understand that I got to where I am through merit.”* (Questionnaire 21/06/2003)

“The job has more facets to it”

Tom had recently changed jobs and he commented on the difference between this job and his previous one. In his current position, there were more aspects of the work that must be done quickly. He said: *“The job has more facets to it and more stresses, there are many different requirements.”* Tom went on to comment: *“There’s a lot that needs to be done ... Initially I was in a new job, you need to cover all these areas and suddenly the month goes by and you haven’t done X and the next month Y doesn’t get done ... There’s a lot more to do in this job.”*

“If I act in this area, I can see a difference”

Tom explained that getting specific tasks done could be rewarding as you could see immediate results. It was not intangible, like *“people development”*, which had a less measurable end product. He said: *“If I act in this area, I can see a difference, so from that point of view it’s very rewarding.”*

“You can’t be still or do nothing in that environment”

In the questionnaire, Simon felt he had so much energy because of the store environment. He said: *“The environment is very energetic, which keeps you active. It is very busy, so you can’t be still or do nothing in that environment.”* The area managers believed that a busy atmosphere in the stores improved profitability. Simon said: *“the whole atmosphere, that buzz around the stores, changed”* to where there were *“vibey staff, great music and a great atmosphere”* which meant *“the stock started flying out the door”*.

“Threatened by shoplifters or customers”

The macro context, characterised by high crime rates and the risk of theft from the stores, led to high levels of stock loss. This meant that the area managers needed to be vigilant in order to adapt. Simon said: *“The other thing that’s not nice sometimes is, you feel threatened or get threatened by shoplifters or customers. They say things like, ‘I’ll make sure you lose your job’. Your cell phone*

number is given out freely. so they can phone you at any time."

This made it hard for an area manager to "shut down".

D: Intervening conditions for an action-focused occupational performance style

"They don't get to all aspects. There's things they just never get to"

Of all the area managers, Tom valued constant action the least and had a number of strategies that he used to counteract the fast paced nature of the retail business. Tom explained how he came to the realisation that he couldn't do everything himself and that some tasks needed to be neglected or delegated. *"There's a lot that needs to be done. The thing I've learnt quite quickly on is that you mustn't stress about getting to every area, because you can't. The job is so fast that even experienced managers, who've been around for a long time, will tell you they don't get to all aspects. There's things they just never get to."*

"I just have to stop"

Tom was able to identify when the job demands became too great and he was able to stop and re-evaluate the situation. This assisted him to work out an effective solution to problems. *"I reach a stage, where I see there are a lot of things that need sorting out and then I say to myself, 'Okay, I just have to stop.' I have to sit down and look at my diary and make a list of all the things I need to do and that*

helps to clear my mind. I am then able to make better decisions and work wiser."

"I laugh at situations"

Both Tom and Charles described how they used humour to deal with the fast pace of the work. Humour helped them to relax and handle the chaos. Tom said: *"I bring humour into situations. I laugh at situations and when things get really outrageous, even out of hand, then I laugh more because sometimes it's probably the only thing you can do."*

"I use my car time to think"

Charles and Tom used the time they spend travelling between stores to think about issues they faced at work and develop solutions to problems. Tom said: *"If something unpredictable has happened and you're doing something else, you're going to be in the car going somewhere or coming back from somewhere, so there is time to think before you need to deal with the problem."*

"I tend not to overreact"

Of the five people who participated in this study, Tom was the only one who described himself as a calm person. He said about himself: *"I tend not to overreact. I'm quite relaxed."* Later on he said: *"The store managers get very uptight and nervous, and the*

more you phone them and carry on, the more uptight they get. So I try to remain calm.”

E: Outcome of an action-focused occupational performance style

“You will also learn to act that way”

Most of area managers' training occurred in-service, so an action-focused approach was passed down to others. Charles explained: *“I think it depends on the people you work with. If your manager is that kind of person, then you will also learn to act that way.”*

“Because you end up living and breathing your job”

The area managers who used an action-focused style of adapting to the demands of the job found it difficult to switch off after work. Simon explained: *“I don't think that many people understand how much you actually put up with, and how much it impacts on your personal life as well. You often are thinking about things when you get home. It's not like other jobs where, when you get into your car at night, you switch off; from now on you are a different person. It's not so easy for us. That's difficult, because you end up living and breathing your job.”*

“I know that the store staff know what to do, normal again.”

Acting swiftly to deal with problems encountered helped the area managers to feel in control of the job. Simon explained how this

process worked: *“As soon as I get things going, things are back on track. I know where I am going. That helps me.”*

“I’m on the right track”

The area managers believed that promotion occurred and ambitions were realised because those in authority valued action-orientated behaviour. Simon explained: *“I think I’ve done everything that I need to do to get my career path clearly structured for me. I think I’m on the right track in terms of that.”* And later, he added: *“I’ve worked hard to build up credibility. People now relate Simon to performance and Simon to success and as an upwardly mobile person who has the confidence to do the job.”*

Figure three: Learning and purposeful occupational performance

C: Critical thinking and reflection causal conditions	
"Always flexible always prepared to change things"	Planned with an awareness of the changeable conditions in which the work occurred
"Forecasting"	Ability to predict the future
"Intuitive feel for retail"	Intuitive understanding of the job
"What's a priority?"	Identified the most important aspects of the job and did them first
"Everyone makes mistakes. I'll learn from them and fix them for next time."	Used actions as opportunities for learning
"It requires you to think on your feet"	Thought and adapted behaviour simultaneously
"I'm thinking ahead maybe to the next level"	Thought about other things whilst doing the job



D: Intervening conditions for purposeful action	
Preparatory thinking	
"I prepare myself"	Preparation for purposeful occupational performance
Reflection on actions	
"I saw I did it wrong I should have done it this way"	Thinking about actions enabled the individual to change behaviour
Systems thinking	
"Systems they don't make sense to me so I challenge them"	Thinking about methods of working enabled new ways of doing



E: Outcome	
"I feel so much more in control"	AM felt calm
"I feel like I'm getting somewhere"	AM gained a sense of satisfaction and achievement
"I can cope"	AM was able to manage the demands of the job
"you can take on more responsibility creating new ways of doing instead of old existing ways of doing"	Critical thinking and purposeful action created new ways of doing

B: Purposeful action causal conditions	
"This isn't a job where you can isolate yourself"	Effective interpersonal relationships enabled purposeful occupational performance
"By getting someone else to do it"	Delegated tasks to others
"I keep myself motivated"	Individual was internally motivated
"Enjoying yourself at work is a very positive thing"	Purposeful doing was enabled through enjoyment.
"I'll change things around I'll do different things"	Variety enabled focused occupational performance



A: Occupational behaviour	
Purposeful occupational performance	
"Then the task is completed"	Successful occupational performance



5.5 Theme Three: Learning and purposeful occupational performance

5.5.1 Explanation of theme three model

Theme three is named learning and purposeful occupational performance because the area managers who used this strategy thought about their work and then acted in a purposeful way. In other words, there are two different styles of occupational performance contained within the theme: learning and purposeful doing. Tom captured the essence of this theme when he said: *"It's not that I can't make a quick decision, but sometimes I have to stop and think."*

The model depicting theme three is different from the first two. (See figure three.) Orange arrows have been used to illustrate the process of adaptation. This theme is different because of the role *critical thinking* and *reflection* play in the adaptation process.

The first occupational performance style described is purposeful doing and as with theme one and two there are causal conditions that give rise to this style of acting. (Labelled B: Doing causal conditions.) For example, being able to work well with others enabled purposeful doing of an occupation.

The second occupational type of occupational performance described is critical thinking and reflection. These act as intervening conditions that alter occupational performance to produce purposeful doing, the outcome of which is changed behaviour. There are causal conditions that enable

this reflection and critical thinking to occur (Labelled C: Critical thinking and reflection causal conditions.) For example, an intuitive understanding of the job requirements enables reflection. Reflection, in turn, enables purposeful occupational performance.

A: Occupational performance style: purposeful action

“Then the task is completed”

The first occupational performance style described in this theme is purposeful action. This action is goal-directed towards a specific purpose and is summed up by the phrase *“and then the task is completed”*. Tom described a proactive style of acting, directed towards getting the job done, when he said: *“Do it. Get in there and do it. That gives you time and space to do other things.”*

B: Causal conditions for purposeful action

“It’s not a job where you can isolate yourself”

The first causal condition relating to purposeful doing included developing effective interpersonal relationships with co-workers. The area managers’ relationships with others were integral to their successful adaptation to work demands. Simon explained: *“The most important skill for this job is team interaction because you can’t function on your own. It’s not a job where you can isolate yourself from the rest of the world and allocate yourself according to ratios and formulae. In this job you need to interact on all levels.”*

You are part of the head office team, part of the field team and part of the store team.” Charles said: “If you have good people skills the difficult situations will be far less.”

Charles believed that to manage people effectively, an area manager must *“understand people first and treat them with respect. Define common ground between you and start to make them think.”*

Tom believed that he worked well with others because he had an ability to listen and to be genuinely interested in people. He also enjoyed developing people and explained how he got *“a kick out of a (store) manager who’s developed, who last week didn’t understand the concept.”* The two quotes illustrate two key aspects of good interpersonal relationships at work. These are an ability to develop good working relationships and at the same time challenge people so that they can grow and develop.

“By getting someone else to do it”

In order to get the job completed the area managers needed to delegate effectively. Simon said: *“You cannot physically do it on your own so you need the support of others and this helps you cope because there are only so many hours in the day. You either have to deal with it yourself by making time or by getting someone else to do it.”*

Tom explained how he delegated by empowering his staff to feel confident to do the job independently. He said: *“I try to get them to*

have awareness and growth within themselves so that they are empowered to take responsibility. I give them confidence and the ability to do the job, not looking over their shoulders all the time. They say to me, you've allowed us to make mistakes. Before, we were terrified to do that."

"I keep myself motivated"

A proactive and responsible attitude towards work enabled purposeful completion of job requirements. Tom explained: *"You know I am quite conscientious."* John wrote how a *"proactive attitude instead of being reactive"* helped him to achieve high levels of productivity. (Questionnaire 26/06/2002)

Simon was able to keep himself motivated at work by having goals focusing on what was important and by continually challenging himself. He explained: *"I know where I want to be, I know what I want to achieve, I want to get there. I have a focus for this year, so it is basically down to me making sure I keep myself on my toes."*

Later in the interview he described how he changed the stores he was working in because he *"knew the challenge would be there because it is important to keep challenging yourself in the job. I am now in a situation where I've got a lot of responsibility from the next level, so equipping myself to deal with a new situation (promotion), when it does come up."*

“Enjoying yourself at work is a very positive thing”

Finding the job enjoyable and satisfying enabled purposeful action in this context. Charles said *“enjoying yourself at work is a very positive thing.”* Tom explained how he *“walks into a store and gets a kick out of being there”* and how he felt he was *“making a difference for the first time in a while. In my previous job if I stopped for three days and carried on three days later, it didn’t seem to make much difference.”*

“... change things around. I’ll do different things”

Charles described how maintaining variety within a working day enabled purposeful occupational performance. He explained how, when doing administrative work, he would *“... change things around. I’ll do different things. If I’m doing admin checks, after a while I’ll find someone to speak to in order to give myself a change.”* The nature of the job was flexible enough for area managers to accommodate this approach in their working day, thus incorporating the most productive way of working.

D: Intervening conditions: Reflection and critical thinking

Within the model described, reflection and critical thinking are intervening conditions that shape purposeful occupational performance. Thinking occurs at all stages of the adaptation process in this theme. Three different types of thinking used by the area managers are summarised in the following phrases:

Preparatory thinking

- *“I prepare myself. I don’t rush. I’m not irrational. I don’t make sudden gut decisions.”* In this quote, Charles was describing the reflection that occurred prior to purposeful occupational performance.

Reflection on action

- *“Once I had done it, I thought about the whole thing. I saw I did it wrong. I should have done it this way.”* Here Charles described short-term reflection aimed at changing behaviour immediately. This thinking related to short-term problem solving.

Systems thinking

- *“Systems – they don’t make sense to me, so I challenge them.”* Simon referred here to methods of working and systems in a general way, not in relation to a specific event. The area managers examined the system and environment in which they worked. This enabled them to challenge existing institutional ways of doing the job and suggest alternative approaches. This benefited the individual as well as the company.

C: Causal conditions related to critical thinking and reflection

As with purposeful occupational performance, there are a number of causal conditions that enabled the type of thinking described. Each type of thinking described has different causal conditions associated with it.

C(1): Causal conditions for preparatory thinking

“Always flexible, always prepared to change things”

The area managers qualified how they prepared themselves for purposeful occupational performance. They emphasised that planning should be carried out in a flexible manner. It needed to be done with an awareness of the changeable environment in which they worked. Charles described this strategy as follows: *“In this job you’re always working towards the unknown. So you’re always flexible, always prepared to change things.”* Tom clarified this further when he said: *“One of the biggest problems that people have is an inability to plan and plan within the dynamic around him. It’s fine, it’s going to change, but you have to have a plan in place.”*

“Forecasting”

Planning includes a number of specific ways of thinking about and approaching problems encountered. It includes a strategy referred to by Charles as forecasting, by which he meant an ability to anticipate what will happen in the future. He explained: *“Another*

skill that I have, which I think is very important, is forecasting. I'm a very analytical person, I can pre-empt what's going to happen. In three months' time, if they don't change now, stop the boat, we're going to hit the same pattern." Later he said: *"If you can see that change is going to happen, then you can start making alternative plans for it, else you're going to go in a downward spiral."*

"Intuitive feel for retail"

Charles described how he had an *"intuitive feel for retail"* and later described this feeling by saying: *"Retail is almost like maths, either you understand it or you don't. You can study, as much as you want, but if you don't understand it, you can't do it. Retail is pretty much the same way, the person doesn't understand until suddenly it just clicks."* Charles believed that this process was instinctive. He was unable to describe in retrospect how he acquired this skill. He described his thinking as a *"gut feel"* and *"something you just know."* He believed that intuitive thinking about retail came from *"years of experience in retail. I started off as a trainee in another store, buffing floors and packing fridges."*

"What's a priority?"

An ability to plan requires an ability to prioritise what is important. Tom explained: *"I won't run from point A to point B. I'll sit down and say, 'Okay. What's a priority for me to do today, what can wait for tomorrow? What can I cancel today, what can I carry over until*

tomorrow?’ and I get through the day.” Simon explained how he prioritised by saying: “For me it’s the positive and the negative. What has the biggest positive and what has the biggest negative. You sort that out first and then you work your way back. You do this by looking at the effect it’s going to have on your business right there and then.”

C (2): Causal conditions for reflection on action

“Everyone makes mistakes. I’ll learn from them and fix it for next time”

In order to implement more effective ways of adapting to the demands of the job, it is important to have the attitude that mistakes are opportunities for learning. Simon explained this approach when he said: *“You know, I don’t feel worse off if I’ve made a mistake. Everyone makes mistakes. I’ll learn from it and fix it for next time. So, I don’t mind criticism, if something goes wrong. To me, it’s just a learning curve and I deal with it quite easily. At the end of the day, one mistake doesn’t make or break you.”*

“It requires you to think on your feet”

Short-term problem solving required the area managers to act, reflect and adjust behaviour simultaneously. Tom explained: *“you know it is going to be unpredictable. I think that it requires you then; in the time you do have, to think on your feet. In the car, I’m thinking two steps ahead.”*

C (3): Causal conditions related to systems thinking

“I’m thinking ahead to the next level”

This category refers to the individual thinking about other matters whilst actively involved in doing the job. Tom explained: *“I’m doing one thing, but my mind is thinking about other things.”* Simon added: *“Yes, I can do the job, but I’m thinking about other things. Thinking ahead to the next level.”*

D: Outcome of purposeful action and reflection

“I feel so much more in control”

The ability to plan and order their thoughts and actions had a calming effect on the area managers. Tom described how he *“sits and works it out and I feel so much more in control of the situation, even though I know there’ll be a hundred things coming ... and then it just clears my mind.”*

“I feel like I’m getting somewhere”

The area managers took comfort from the fact that their actions had a positive end result. Tom said: *“I think because I am learning, I feel like I’m getting somewhere. I feel I’m achieving something.”*

Taking proactive action to deal with a problem results in an ability to cope more effectively with day-to-day tasks. Tom explained: *“It calms me down and I can cope.”* Proactive action is, in Charles’s

opinion, less stressful than doing something that was less productive. He said: *"I think a day when you're in a meeting and maybe only half that meeting is applicable to you, you're tired and I think probably more stressed and more pressurised than if you're physically busy with something. You get meetings and you get meetings. Some you just have to be there for the sake of being there and because it's policy or something. It doesn't interest me, I could be more productive elsewhere."*

The positive outcomes described above contributed to the area managers developing a sense of mastery over their work. This contributed to their enthusiasm for developing new ways of thinking and acting in response to these demands. Ideally this cycle of behaviour should not be static, but should rather be ongoing, as the person encounters new challenges. When member checking was completed, Charles summed up the outcome of this theme when he said: *"You can take on more responsibility and create new ways of doing instead of old existing ways of doing."*

Chapter Six: Discussion

6.1 Introduction

I will begin by discussing the different adaptation strategies used in relation to my model. I will compare and contrast my findings with that of other writers. I will then go on to discuss the factors that influenced the strategy chosen and the process of adaptation. In conclusion, I will discuss the conditions, which influenced the outcome of adaptation in the cases presented.

6.2 Discussion of study themes

The three study themes corresponded with the work of Schultz and Schkade (1997, in Christiansen and Baum, 1997, p.476) who describe three types of “adaptive response behaviours” in response to stress. Theme one of my study corresponds with what Schultz and Schkade call “primitive” or “frozen” adaptive response behaviour. They describe the behaviour exhibited by individuals using this strategy as stereotypical and stable. In my study, the participants who chose this response to job demands relied on postponing tasks (frozen) or responded to job demands in stereotypical and procedural ways. I called theme two action-focused occupational performance. The participants using this style demonstrated behaviour that Schultz and Schkade (p.476) call “hyper mobile in all person systems with high energy levels that are random, unmodulated and variable.” The third theme illustrated what Schultz and Schkade (p.476) refer to as a “mature” adaptive response system. Here

the participants demonstrated both periods of mobility and stability. Their actions and goals were directed and modulated. With the third theme the “adaptive energy” was both focused on specific tasks as well as more “creative, sophisticated low-energy use, disregarding structure in favour of alternative approaches.”

6.3 Discussion of model

My study findings differed from Schultz and Schkade's in how the participants adapted their style of behaviour in response to stress. Schultz and Schkade's hypothesis states that stereotypical responses to stress make adaption impossible. They believe that a “hyper mobile” strategy makes adaptation more likely, as the person has a chance of accidentally coming across a different style of acting as they move about randomly. My study findings identified specific styles of acting, namely avoidant, action-focused, and learning and purposeful action, which correspond to Schultz and Schkade's work. However, my understanding of the process of adaptation is different. I believe that even if a person acts in a stereotypical way, by avoiding boring tasks for example, this behaviour can be adapted if influenced by an intervening condition, such as a proactive attitude. In other words, I believe that adaptation is possible whatever the original strategy adopted.

The view taken in interpreting my model was more in line with Bandura. His social cognitive theory explains human functioning in terms of a dynamic interplay between humans and the environment (Bandura, 2001, p.13). The participants bring their values, personality, motivation and

assumptions into the work situation, within a specific physical, cultural and social environment. These intrinsic factors interact with job demands to produce styles of occupational performance aimed at managing work stress.

The models developed from the findings of this study demonstrate that adaptation is a complex, multidimensional feature of occupational performance. The adaptation illustrated through the cases in this study is a process rather than a snapshot, and the data was interpreted in terms of interrelationships rather than cause-and-effect chains.

6.4 The influence of causal conditions

In most cases the style of occupational performance illustrated by the area managers was likely to be habitual in nature. Dewey (in Clark, 2000, p.129) defines habits as "acquired dispositions to particular modes of response." Unless an intervening condition, such as critical thinking, is present to change and shape behaviour, the strategy adopted by an individual is likely to remain unchanged. The intervening conditions allow a contrasting or alternative response within the adaptation process.

Conditions within the work environment mean that participants were more likely to act in tried and tested ways than change their behaviour. A good example is shown within the action-focused theme, where the individuals *"don't always have time to listen"* or *"it's very important to be busy."*

Within theme two the action-focused method of acting is highly valued by others, particularly those in authority. According to Kielhofner and Forsyth

(1997, p.105) how one behaves is influenced by "values, beliefs and commitments. From childhood on, people interact within the cultural milieu, which embodies values. These values define what is good, right and important, and serve as guiding principles to guide conduct." This suggests that a collective socialisation process influences how an individual behaves. Family, class, social group and work context influence one's actions (Bordieu in Swartz, 2002, p.67S). The participants responded to the conditions in the social context and this bestowed on their behaviour a collective dimension. The social context here refers to the "the world of interacting people and the things that they do" (Kielhofner and Forsyth, 1997, p.108).

Focusing on the action component of occupational performance was a quality shown by most of the participants. Charles believed that an action-focused approach to work was prevalent amongst the area managers because "*you also learn to act that way.*" The training programme offered by the company focused on in-service training with older members of staff mentoring trainees. The fast paced environment, "you snooze you lose" attitude and constant pressure to make a profit resulted in an action-focused style of behaviour becoming the only acceptable way of doing the job. Kielhofner and Forsyth (1997, p.105) write that "values elicit strong emotions and emotions create strong dispositions to follow what is the right way to behave. Consequently acting contrary to values can lead to feelings of inadequacy or failure." This collective dimension, that is the pressure from others within the social context, entrenched this style of behaviour.

In contrast, boring mundane tasks could be safely avoided because they were not valued. Without pressure to change behaviour, the strategy of postponing administrative tasks continued.

6.5 Enablers of adaptation

6.5.1 Control over extrinsic factors enables adaptation

The extrinsic factors described as causal conditions in themes one and two acted to bring about homeostasis rather than adaptation. The drive was to remain in comfortable, well-established ways of acting. The participants believed that extrinsic conditions existed that were outside their control. The job itself that was *"inflexible"*, other *"people are practised in the old way of doing things"* or the work environment *"changes and it's very dynamic by nature."* When examining the intervening conditions that resulted in changed behaviour, many of the examples given revolved around attitudes or skills, which were intrinsic. Examples were: *"I tend not to overreact, I laugh at situations."* Charles's explanation of how he changed his management style (see p.65) is a good example. He enlisted the assistance of others to change behaviour.

In theme one and two the behaviour demonstrated was passive. The area managers struggled to give up the particular style of behaviour.

Polkinghorne (1996, p.302) refers to victimic and agentic life plots. People who understand themselves as victimic believe that they are victims of circumstance and tend to give up the power to control their lives (Burke, 1977, in Polkinghorne, 1996, p.302). In contrast Hopkins (in Polkinghorne,

1996, p.302) believes that “an adaptive person was one whose purposive performance promoted survival and self-actualisation. A person living an agentic life plot is able to actively set goals, overcome obstacles and actualise ideals.” In other words, for the intervening conditions to successfully change behaviour, the individuals need to believe themselves to be in control of the extrinsic factors that influence behaviour.

In theme two a different perspective on the case of control and its influence on adaptation was shown. An action-focused occupational performance style was highly valued in the group of area managers who took part in this study and this led to a number of successful outcomes for them. An area manager acting in this way was able to see evidence of personal efficacy and competence. This is evidenced by the quote *“If I act in this way, I can see a difference.”* In theme two the area managers received immediate feedback by acting quickly. An action-focused occupational performance style enabled the participant to feel that he or she had exerted control over the aspects of the job that were important and valued by others, for example, being seen to make an impact on profit. Doble (1988, p.78) states, “when personal control is high, enjoyment of the behaviour or task for its own sake is increased.” This provided the rationale for area managers continuing to act in that way rather than adapt their behaviour.

6.5.2 Perception of control versus actual control

In some cases within this work environment it was sufficient for a participant to have a perception of being in control of causal conditions. In

the literature review Schultz and Schkade (1997, in Christiansen and Baum, 1997, p.469) were quoted, saying that individuals have an “innate urge to experience mastery over person environment transactions” and it is this that provides the “impetus for adaptation.” In category one of theme one, this was the category where Tom avoided the task of merchandising – it was sufficient to be perceived to be competent in the eyes of others. It was more important that others see Tom as competent than to actually possess the skill himself. Adaptation was therefore influenced by perceptions and was not necessarily a reflection of the facts. Cooley, James and Mead’s (in Christiansen, 2000, p.104) theory is that “self concept is formed through the reactions of others to behaviour.” This means that social approval is a major consideration in “appraisals of the self and in the choices for goals and actions” (Christiansen, 2000, p.104). In Tom’s case, acceptance by others outweighed the need to experience mastery, and this influenced the decision to avoid learning the necessary skills of the job.

6.5.3 Creating meaning enables adaptation

Much occupational therapy literature emphasises the concept of meaningful occupation and the need to find meaning within occupational performance. Kielhofner (in Doble, 1987, p.77) defines meaning as the “individual’s disposition to find importance, security, worthiness and purpose in occupation.” In theme one many of the tasks avoided lacked meaning to the participants and they were not inspired to perform them. For example *“most of the area managers find the admin a drag.”* It was

only through changing their attitude towards these tasks, as Tom did, that they became easier to complete. He created meaning for himself by getting satisfaction from saying: *"I'm quite conscientious and I realise that it is part of my job so I just get in there and do it. Not quickly because it takes time. But do it and get your sense of satisfaction from signing it off. Ticking and saying, 'OK that's one less thing that I have to do.' So I don't get hung up about it, the boring aspect."* The participant was in control over the decision to find meaning within the performance of occupations, or alternatively to find the tasks meaningless.

6.5.4 Ongoing challenge enables adaptation

In order for a participant to perceive himself/herself as competent and thus be motivated to continue working at managing job demands, the tasks could not be deemed too easy. Doble (1988, p.79) believes that a task should incorporate a moderate degree of difficulty and a sense of challenge. "Fail-safe projects do not yield a sense of efficacy, accomplishment or significance and the impact of an individual's personal effort and skill will not be perceived" (Fisher in Doble, 1988, p.79). Simon, who believed that administrative tasks were a waste of his talents and did not challenge him, illustrated this point. One of the important principles of occupational therapy is that there must be a match between the participant's perceptions of his or her skills and the environmental demands. Csikszentmihalyi (in Emerson, 1998, p.39) believes that when the demands of the environment did not tax the individual's perceived

skills, boredom and apathy occur. For ongoing adaptation, the work environment should afford opportunities for ongoing challenge.

6.5.5 Reflection and critical thinking and its role in the process of adaptation

Theme two illustrated a group of area managers focused on the doing component of occupational performance. Recent occupational therapy literature has begun to focus on the concepts of what Wilcock (1998b, pp.249-256) refers to as doing, being and becoming. Wilcock's hypothesis is that in order to become something different, a person needs to both do and be. Wilcock (1998b, p.249) emphasises the need for purposeful doing and states that it is "impossible to envisage a world without it". However, she cautions against some of the ways people engage in purposeful doing and suggests that, as in the case of the area managers, people are "expected to do too much." Wilcock (1998b, p.250) cites Schaefer (1990) who suggests: "true passion and doing what is important to us does not require us to destroy ourselves in the process." An action-focused occupational performance style had negative consequences for the area managers as they "*ended up living and breathing your job.*"

For successful adaptation to occur, the results of this study indicate that critical thinking and reflection are vital components of the process. An action-focused style provides limited opportunity for reflection. Wilcock (1998a, p.144) believes that for optimal wellbeing a "balance between intellectual challenges, spiritual experiences, emotional highs and lows and relaxation is required. This does not imply constant high powered,

mental doing and feeling, rather that this should be interwoven with time for simple being." An area manager focused on doing does not allow for this and this led to the negative consequences described in theme two.

6.5.6 Different styles of thinking identified

Townsend (1997, p.20) writes that we "transform ourselves by the active process of planning, doing and evaluating." This process is demonstrated in theme three. I feel that Townsend underestimates the type and degree of learning that can occur in the work setting. Within the results of this study, various types of thinking about the job are illustrated. These include short-term planning, problem-solving and broader thinking about systems and the context in which work is done. All types of thinking are necessary because as Senge (1990, p.22) explains "if people's thinking is dominated by short-term events the best that can ever be achieved is to predict an event before it happens so that you react optimally, if short-term thinking predominates we can never learn to create."

6.6 Barriers to learning

Although theme three emphasised the need for critical reflection, Bordieu (in Swartz, 2002, p.63S) states "critical reflection is the exception rather than the rule." Dewey in Clark (2000, p.129S) writes that people have "tendencies to think in certain ways and that these attitudes towards life are hardest to change." Boud et al (1993, p.80) identify a number of factors that inhibit learning:

- The participant's past experience

- Accepted propositions about what learning can take place, lack of awareness of assumptions
- The emotional state of the learner
- Established patterns of behaviour.

Many of these factors were illustrated in the results of this study.

Tom believed that a person could change and improve behaviour through experience. However, Einhorn and Hogarth (in Cox, 1993, p.21) believe that a person does not necessarily learn from experience. Firstly, the person may not be aware that there is something to be learned. Secondly, what is learnt is often not clear. Thirdly, there are often emotional reasons that stand in the way of interpreting what was learnt. Ryan (in Boud and Felletti, 1998, p.127) writes that in order for learning to occur experience must be both experienced and reflected on. This process was shown in theme three where Charles said: *"I saw I did it wrong. I should have done it this way"*. In other words, experience was insufficient; reflection was necessary for adaptation to occur.

Another barrier to learning in this context was that assumptions about valued ways of behaving were not challenged. Brookfield (1987, p.7) writes that participants must challenge their assumptions in order to think critically. The area managers' assumption that profit was increased through focusing on the doing component of occupational performance went unchallenged. In fact, their behaviour was reinforced through the focus on how much profit was made.

6.7 Importance of learning in work settings

The impact of learning in assisting people to grow and develop within work organisations is a feature of the writing of Senge (1990). He advocates that companies develop disciplines focused on learning to foster positive change. I believe that his work is reflected in the variety and scope of learning that occurred in the work setting studied. Senge (1990, p.15) believes that for organisations to change, the following types of learning must be fostered:

- “*Team learning*, as the learning ability of a team is greater than that of the participant”
- “A *shared vision* that is understood by all members of the team”
- “An *understanding of mental models*, that is, the assumptions, that underpin participants’ understanding of their work”
- “*Constantly reviewing and clarifying one’s personal vision* and assessing the gap between current and desired performance”
- “*Systems thinking*, that is, the ability to see the entire process and the interrelationships between factors.”

Senge (1990, p.15) feels that for organisations to be effective, a change in the dominant mindset, of knowledge as a personal asset, needs to be made. Participants must be rewarded for collective learning. To remain adaptive, an atmosphere of openness, reflectivity and tolerance of error and uncertainty is needed. To achieve this, organisations must create an

environment for learning to occur, remove a fear of change, shift the locus of control to empower staff, reward learning and encourage experimentation. Although some of the managers in this study were able to put most of these principles into practice, there were barriers to learning within this organisation. These were:

- Problems experienced translating the company values into action
- Competitiveness between area managers resulting in a lack of team learning
- Lack of analysis of their assumptions about valued behaviours maintained set patterns of acting.

6.8 Learning and stress reduction

The central place occupied by learning within the process of adaptation created an anomaly in this study. Boud et al (1993, p.45) refer to a cycle of growth in self-directed learning, the first stage of which they call disconfirmation. Here the learner's existing expectations and assumptions are challenged and the learner becomes disorientated. At the beginning of my study, I made the assumption that adaptation would lead to a decrease in stress if done successfully. But learning, the adaptation process itself, brings with it some discomfort and possibly stress.

Some stress was necessary for growth and development. A study by Simpson (2000) investigated the effect of implementing the principles of

Senge's learning organisations on employees' stress levels. It found that his approach had a positive effect on factors associated with decreased stress, such as feelings of being in control and an ability to make one's own decisions. The study concluded that the benefits of the approach outweigh the negative.

6.9 Adaptation within a social context

An illustration of the dynamic interplay between the person, their environment and the demands of the job was demonstrated when the area managers were observed interacting with their co-workers. The causal conditions and the demands of the job interacted with one another to produce a specific style of occupational performance.

As analysis of the data progressed, I realised that the reason, intent and objectives underlying one's actions had an effect on the strategy used when dealing with others. Hall and Hawker (1981, p.12) call this an individual's power motivation. They believe that power is an integral part of organisational life and its effective use is a "critical function of those with authority and influence in organisations." How one uses that power is referred to as one's "power style."

As analysis progressed, I realised that successful negotiation of interpersonal relationships is a predictor of positive outcomes. As Simon explained: "*this isn't a job where you can isolate yourself.*" Tom's ability to empower his staff enabled purposeful completion of job requirements.

The power motivation related to the strategy used, and this impacted on the outcome of adaptation. In order to illustrate this, an explanation of three different types of power styles identified by Hall and Hawker (1981, p.10) is necessary.

6.9.1 Affiliated power motive

An affiliated power motive is a tendency to “value and desire being liked and warmly regarded by other people.” (Hall and Hawker, 1981, p.10) A desire to belong to a group, a fundamental human need, was only met to a limited degree within the work setting. Although all of the area managers thought that relationships within their group were good, they seemed to occur a superficial level. Competition between the different area managers for recognition took precedence. Charles referred to “*competitiveness in the industry*” and how with “*competitiveness you will always get stress.*” This created a strong desire to be liked and accepted by head office staff. The need to belong and conform to the expectations of others drove some of the behaviour seen in theme one and two. The area managers perceived that administrative tasks were not valued as much as being busy and active. This caused them to avoid administrative tasks and value action-focused occupational performance instead. The need to be liked was seen in circumstances where the area managers avoided confronting those in authority even when they had identified more effective ways of doing the job.

The outcome of an affiliated motive and resulting adaptive strategy chosen was unsuccessful in the eyes of the area managers. In theme one,

difficult issues remain unresolved. As Charles said: *“Everything was not sorted out.”* In theme two the desire to please meant that the area managers ended up *“living and breathing”* their jobs (Simon). The need to be liked prevented a participant from using an adaptive strategy that reduced stress.

6.9.2 Personalised power motive

A personalised power motive is the tendency to “value and desire power for the purposes of personal aggrandisement and control. A person with this type of power motive needs to be in control of interpersonal situations and to prevail in most encounters with others.” (Hall and Hawker, 1981, p.10) A personalised power motive causes individuals to value efficiency and getting the job done. Simon demonstrated features of this motive as he focused on *“what’s the course of action, right then go and do it”* or *“the situation requires an outcome and that’s the outcome we need. How do we get there? Course of action?”* Although he tried to get his staff to think for themselves, he remained in control of the relationship. This quality was demonstrated in this quote: *“The requirement for my stores is that if you have a problem and you don’t know what to do, you phone me, but with possible solutions that you’ve thought through, and then I’ll tell you if I agree or disagree. If I don’t agree I will say, ‘I hear what you are saying, but this is what we should really do’.”*

Simon perceived a positive outcome from his behaviour as he was promoted, he said: *“so people see – this guy has the potential to do things,”* and *“I’ve worked hard to build up credibility. People now relate*

Simon to performance and Simon to success and as an upwardly mobile person who has confidence to do the job.” At the same time being motivated by one's own success had negative consequences because, as Simon explained, the job became one *“where it is difficult to switch off”*.

6.9.3 Socialised power motive

A socialised power motive is the tendency “to value and desire power for the purposes of serving and benefiting the common welfare. Progress and growth-related activities that are highly valued by this person coupled with a desire to promote and facilitate these activities in others.” (Hall and Hawker, 1981) Tom demonstrated this quality when he spoke about how he wanted to empower his staff to take control of the store and work for themselves. This power motivation was demonstrated when he talked about his relationship with store managers:

- *“Within our team meetings we build a team approach, I give them the same goals to work towards and I think that makes them into a team.”*
- *“I try to get them to have awareness and growth within themselves. Empower them to take responsibility.”*

The outcome of this type of power motivation was positive, as Tom said: *“I’ve developed a relationship of trust that probably wasn’t there before.”*

The area managers obtained personal satisfaction from a socialised power motivation. Charles explained: *“I think the biggest reward comes, is just to see people going through the ranks. I think because of my*

influence, but you will also sometimes say to yourself, 'This person's not going to make it, and then you train him and work with him and teach him other things and then things change.'

A socialised power motivation was a more effective way of working with others. This in turn enabled the area managers to feel that they could cope, that they could take on more responsibility, and ultimately enabled more purposeful occupational performance.

McCelland and Burnham (in Hall and Hawker, 1981, p.12) conducted a study and found that a strong socialised power motive was more a characteristic of a good manager than either a need for personal achievement or a need to be liked. A person who was aware of the intentions behind his or her actions was more likely to change. Thorén-Jönsson et al (1999, p.359) suggest that the first stage in "changing behaviour is an awareness of it."

Chapter Seven:

Conclusion

Chapter Seven: Conclusion

7.1. Researcher assumptions

At the beginning of this study I had a number of assumptions about adaptation that were made explicit in the research proposal. As a way of concluding this report, I will examine what these were and discuss how my thinking changed over the course of my research.

- People who engage in jobs that place high demands on their time will experience difficulties achieving successful adaptation.

During data collection, the participants emphasised that the job demands placed on them were not a problem. They enjoyed the fast-paced environment in which they worked. Rowles (2000, p.60S) writes “there is a misconception that stress needs to be eliminated and controlled, which is not consistent with the reality of most peoples lives. Indeed a modicum of stress is positively adaptive. It keeps people alive and stimulated, even when on the verge of chaos.” Stress acts as the impetus for adapting habitual styles of occupational performance. This concept was demonstrated when existing habitual patterns of acting were found to be inadequate. The area managers changed how they organised and managed the job by employing critical thinking strategies. This resulted in positive outcomes as the participants felt “*so much more in control*”, “*like I’m getting somewhere*” and that they “*can cope*”.

- Personality factors may influence how individuals order and organise their occupations.

A person's identity is tied up in how he/she manages his/her work occupations to achieve adaptation. Simon demonstrated this in theme two when he saw himself as *"an action orientated kind of guy."*

- Common ideas about adaptation within time and place relate to the time budget approach to organising and ordering your occupations and this is insufficient for describing the process of adaptation.

Routines are a factor that enabled adaptation. They create a stable framework on which a person can reflect and develop. However, adaptation is a more complex process than simply having sufficient hours in the day to complete tasks. A time budget approach suggests a linear way of looking at adaptation, whereas I see it as an open system where a number of diverse factors impact on it.

- Having a limited range of occupations or limited variety within your occupational repertoire can prevent adaptation.

Variety and challenge is an essential aspect of occupational performance. If these were not available, the area managers created them in order to cope with the more mundane aspects of the job. For example, Charles's comment: *"I'll change things around, I'll do different things"* illustrates this point.

- Your occupational repertoire should meet a number of intrinsic needs. If it does not, this could result in difficulties achieving adaptation.

The work occupation described in this study met a number of intrinsic needs and provided job satisfaction. However, where work was meaningless, mundane and unchallenging, the participants were more likely to adopt avoidant strategies as opposed to using new ways of approaching tasks. At the same time, individual needs influenced the strategy that an area manager used to cope with job demands. A desire to be liked by others led area managers to avoid conflict with superiors.

- Factors within the work environment can support or inhibit the adaptation process.

Although a number of environmental factors were identified that acted as causal and intervening factors in shaping adaptive behaviour, the relationship between the person and the environment was the crucial element. For successful adaptation to occur, the individual needed to remain in control of this interaction. Where an outcome was less successful, as in work not being completed, the result was more likely to be attributed to environmental conditions outside of the individual.

- Each individual's personal experience – context, personality, values, etc – will influence how he or she adapts in the work context.

This was the case in this study. I described a specific work context and the behaviour of individuals with their own values and ways of understanding the world. Both intrinsic and extrinsic factors acted to change existing patterns of occupational performance.

- Indicators that adaptation had occurred:
 - ⇒ New ideas were generated
 - ⇒ Changed approaches to doing occupations
 - ⇒ Changed approaches to thinking about occupations
 - ⇒ Learning from experience
 - ⇒ Successful interpersonal contact

These indicators of successful adaptation were observed in this study, in particular with regard to successful interpersonal contact and changed approaches to thinking about occupations. Although the area managers were able to generate new ideas, this was often with respect to their own work in the stores. When working with those in authority, such as head office staff, some of these ideas were blocked. This was because of the assumptions the area manager had about how the ideas would be interpreted by others.

- An inability to achieve successful adaptation will result in:
 - ⇒ Decreased life satisfaction or motivation to engage in occupation
 - ⇒ Decreased productivity
 - ⇒ Increased levels of stress and anxiety
 - ⇒ Decreased quality of performance

A tendency to remain in habitual or routine ways of acting can be detrimental. In general, lack of adaptive facility led to a narrowing of individual choice and control. This led to finding aspects of the work meaningless and made it hard for the area managers to adapt.

A direct relationship between unsuccessful adaptation and decreased quality of work performance and stress, was not established in this study. For example, avoiding conflict with others at work can have both a negative and positive effect on quality of performance. Issues remained unresolved, but energy was conserved for dealing with other issues.

7.2 An enhanced understanding of adaptation

At the beginning of this study, I used Schultz and Schkade's definition of occupational adaptation, which is "adaptation is a change the person makes in his or her response approach when that person encounters an occupational challenge. This change is implemented when the individual's customary approaches are found inadequate for producing some degree of mastery over the challenge." (Schultz and Schkade, 1997, in Christiansen and Baum, 1997, p.474)

After analysis of data, I enhanced my understanding of adaptation.

- *Adaptation is a process that enables individuals to alter their existing routine and habitual ways of performing occupations within a physical, social and cultural context through critical thinking and reflection.*

- *The individual is central to the process. They control how, why, when and where adaptation occurs.*
- *In conjunction with this, individual process adaptation does not occur in isolation. It is also as a result of negotiating one's interpersonal relationships with others. An understanding of the value of interdependence, how one can both assist and be assisted by other people, makes the adaptation process successful.*

Successful implementation of adaptation leads to a person feeling more "control", "like I'm getting somewhere" "that (I) can cope" and "capable of creating new ways of doing and taking on more responsibility".

Chapter Eight:
Recommendations

Chapter Eight: Recommendations

8.1 Recommendations for further research

This study was exploratory and investigated a specific group of people performing a specific job in a specific industry. Further research investigating adaptation strategies used in wider contexts would reveal a comprehensive list of occupational performance styles. For example, individuals who do more sedentary jobs with less contact with people could reveal a different result.

During the course of this study, I identified two stressors that were particularly relevant to the South African context at the time, namely, being referred to as an affirmative-action candidate and high levels of crime. Simon adapted to these stresses by becoming hyper vigilant and working harder. It would be interesting to explore these types of stressors in more detail with a range of individuals from different industries.

Although it was one of the intentions of this study to illustrate how successful adaptation could be used to promote health, the link between these two concepts was unclear. A quantitative study examining this link would be interesting.

This study identified the importance of learning within a work context. It did not establish whether an ability to reflect and think critically reduced stress. A study relating to individuals' experiences of working in a learning organisation, such as that described by Senge (1990), would be useful to confirm the results of this study. A mixture of quantitative measurement

and recording of qualitative experience could indicate both the effect of learning on stress reduction.

8.2 Recommendations for the company

A work environment that fosters learning can assist individuals to cope with job demands. Strategies suggested by Senge (1990) can be used to foster team learning and create an environment where creative thinking and learning is encouraged. Staff should be empowered to take risks and to examine their own performance critically.

In this study, the way success in the job was measured indicated a disjunction between what top management said and what staff heard. Success at work needs to consider both long-term and short-term objectives, profit, and people development. The softer skills, such as negotiation and people development, require measurement.

8.3 Recommendations for occupational therapists

Change in behaviour is a gradual and ongoing process across the lifespan. It is important not to focus only on short-term problem-solving, but to examine the context in which the person works. The social context was found to have particular relevance in this study. Occupational therapists need to take into account the relationships that individuals have with others when carrying out assessments.

When designing behaviour changing programmes, an ability to identify the intervening factors that bring about change in individuals will assist in

tailoring the programmes to the specific needs and circumstances of individuals. An understanding of the motivations and intentions of clients will help us uncover their needs. Thus the causal conditions underlying behaviour could be uncovered. This will enable us to identify and develop, in conjunction with the client, successful intervening factors that will assist individuals to change behaviour.

This study identified a number of occupational therapy concepts that can be applied in wider contexts. For example, jobs can be adapted and changed in order to make them healthier. The participants in this study emphasised the need for ongoing challenge and variety within an occupational repertoire. The skill of matching individuals' competencies to tasks so that they are challenged is vital for development. Employers can implement programmes that encourage staff development and learning, allow for variety and assist staff to change the way they do or perceive their jobs in order to ensure that what they do is meaningful.

8.4 Recommendations for individuals

This study stressed the importance of critical thinking and reflection skills, such as examining one's assumptions. Kegan and Lahey (2001) suggest that in order to do this, individuals needed to examine their competing commitments. In this study, a desire to be liked caused the area managers to be action-focused to the detriment of this critical-thinking process. Although the area managers could identify the negative consequences of this action, they were unable to change behaviour.

This study identified the different types of critical thinking and reflection that could be utilised to adapt to stress. At the same time, critical thinking does not always have to be high powered and focused on getting the job done. As with the doing component of occupational performance, variety needs to be created between high-powered thinking and restful meditative thinking; which Wilcock (1998a) refers to as "being".

Lastly, the results of this study indicate that adaptation does not occur in isolation. An ability to adapt to job demands was enhanced by effective interpersonal relationships with others. An individual who was able to harness the power of community and understood the importance of social connection and interdependence was more likely to be positively adaptive than someone who worked in isolation.

References

References:

1. The American Association of Occupational Therapists. (1995).
Position paper: Occupational performance: occupational therapy's
definition of function. *The American Journal of Occupational
Therapy*, 49(10), 1019-1020.
2. The American Association of Occupational Therapists. (1995).
Position paper: Occupation. *The American Journal of Occupational
Therapy*, 49(10), 1017.
3. Bailey, K.D. (1982). *Methods of social research*. (2nd ed.) New York:
Free Press.
4. Bandura, A. (2001). Social cognitive theory: an agentic perspective.
Annual Review of Psychology, 52, 1-26.
5. Boud, D. & Fellettl, G. (1998). *The challenge of problem-based
learning* (2nd ed.) London: Kagan Page.
6. Boud, D., Cohen, R. & Walker, D. (1993). *Using experience for
learning*. Buckingham: Oxford University Press.
7. Brookfield, S.D. (1987). *Developing critical thinkers: challenging
adults to explore alternative ways of thinking and acting*. San
Francisco: Jossey-Bass.
8. Business Times Reporter. (2002, May, 26). Violence at work
sickens health workers. *Sunday Times*. Retrieved 3 November
2003 from www.sundaytimes.co.za.

9. Business Times Reporter. (2002, June 30). Take the strain out of work. Sunday Times. Retrieved 3 November 2003 from www.sundaytimes.co.za.
10. Canadian Association of Occupational Therapists. (1997). Position statement on health promotion. Canadian Journal of Occupational Therapy, 65(2), 120.
11. Christiansen, C. (2000). Identity, personal projects and happiness: self-construction in everyday action. The American Journal of Occupational Therapy, 7(3), 98-107.
12. Christiansen, C. & Baum, C. (eds). (1997). Occupational therapy: enabling function and well-being. Thorofare, N.J: Slack Incorporated.
13. Clark, F. (2000). The concepts of habit and routine: a preliminary theoretical synthesis. The Occupational Therapy Journal of Research, 20, Fall, Supplement, 123S-135S.
14. Cole, M.B. (1998). Time mastery in business and occupational therapy. Work, 10, 119-127.
15. Corbin J. & Straus A.L. (1998). Basics of qualitative research: techniques and procedures for developing grounded theory (2nd ed.) Thousand Oaks: Sage Publications.

16. Cox, T. (1994). Stress research and stress management. Health and Safety Executive Contract Research Report No. 61/1993. Retrieved 29 April 2003 from www.hse.gov.uk/stress/index.htm.
17. Cresswell, J.W. (1998). Qualitative inquiry and research design: choosing amongst the five traditions. London: Sage Publications.
18. Daniels, K., Harris, C. & Briner, R. (2002). Understanding the risks of stress: a cognitive approach. Health and Safety Executive Contract Research Report No. 427/2002. Retrieved 29 April 2003 from www.hse.gov.uk/stress/index.htm.
19. Denzin, N.K. & Lincoln, Y.S. (1998). Strategies of qualitative inquiry. New York: Sage Publications.
20. Doble, S. (1988). Intrinsic motivation and clinical practice: the key to understanding the unmotivated client. *The Canadian Journal of Occupational Therapy*, 5(2), 75-80.
21. Du Ploy, E. & Gitlin, L.N. (1994). Introduction to research: multiple strategies for health and human sciences. St. Louis: Mosby.
22. Emerson, H. (1998). Flow and occupation: a review of the literature. *The Canadian Journal of Occupational Therapy*, 65(1), 37-43.
23. Fidler, G. (1996). Life-style performance model: from profile to conceptual model. *The Canadian Journal of Occupational Therapy*, 50(2), 139-147.

24. Flick, U. (1998). An introduction to qualitative research. London: Sage Publications.
25. Frank, G. (1996). The concept of adaptation as a foundation for occupational science research. In Zemke, R. & Clark, F. (eds.), Occupational science: an evolving discipline. (47-55). Philadelphia: F.A. Davis.
26. Hagerdorn, R. (1995). Occupational therapy perspectives and processes. Edinburgh: Churchill Livingstone.
27. Hall, J. & Hawker, J. (1988). Power management profile. Texas: Telometrics Int'l.
28. Health and Safety Executive. (2003). Retrieved April 29 2003 from www.hse.gov.uk/stress/index.htm.
29. Health Systems Trust. South African Health Review 1999. Retrieved June 20 2003 from www.hst.org.za.
30. Katzenellenbogen, J.M., Joubert, G. & Abdool Karim, S.S. (1997). Epidemiology: a manual for South Africa. South Africa: Oxford University Press.
31. Kegan, R. & Lahey, L. (2001). The real reason people won't change. Harvard Business Review, November, 85-92.
32. Kielhofner, G. & Forsyth, K. (1997a). The model of human occupation: an overview of current concepts. The British Journal of Occupational Therapy, 60(3) 103-110.

33. Krefting, L. (1991). Rigor in qualitative research: the assessment of trustworthiness. *The American Journal of Occupational Therapy*, 51(1), 11-22.
34. Larson, E. (2000). The orchestration of occupation: the dance of mothers. *The American Journal of Occupational Therapy*, 54(3), 214-222.
35. Law, M., Steinwender, S. & Leclaire, L. (1998). Occupation, health and wellbeing. *The Canadian Journal of Occupational Therapy*, 65(2), 81-91.
36. Nelson, D. (1997). Why the profession of occupational therapy will flourish and grow in the 21st century. *The American Journal of Occupational Therapy*, 51(1), 147-154.
37. Liebeck, H. & Pollard, E. (eds.). (1994). *The Oxford paperback dictionary*. Oxford: Oxford University Press.
38. Pierce, D. (2001). Untangling occupation and activity. *The American Journal of Occupational Therapy*, 55(2), 138-146.
39. Polkinghorne, D.E. (1996). Transformative narratives: from victimic to agentic life plots. *The American Journal of Occupational Therapy*, 50(4), 299-305.
40. Rowles, G.D. (2000). Habituation and being in place. *The Occupational Therapy Journal of Research*, Winter, 22, Supplement, 58S-65S.

41. Schultz, S. & Schkade, J. (1997). Adaptation. In Christiansen, C. & Baum, C. (eds). Occupational therapy enabling function and well-being (460-481). Thorofare, N.J: Slack Incorporated.
42. Senge, P. (1990). The fifth discipline: the art and science of the learning organisation. London: Century Business.
43. Simpson, N. (2000). The effects of new ways of working on employers' stress levels. Health and Safety Executive Contract Research Report No. 259/2000. Retrieved June 6 2003 from www.hse.gov.uk/stress/index.htm.
44. Spencer, J., Daybell, P.J., Eschenfelder, V., Khalaf, R., Pike, J.M. & Woods-Petitti, M. (1998). Contrasting perspectives on work: an exploratory qualitative study based on the concept of adaptation. *The American Journal of Occupational Therapy*, 52(6), 474-483.
45. Swartz, D. (1994). The sociology of habit: the perspective of Pierre Bourdieu. *The Occupational Therapy Journal of Research*, Winter, 22, Supplement, 61S-69S.
46. Thorén-Jönsson, A., Moller, A. & Grimby, G. (1999). Managing occupations in every day life to achieve adaptation. *The American Journal of Occupational Therapy*, 53(4). 354-359.
47. Townsend, E. (1997). Occupation: potential for personal and social transformation. *The Journal of Occupational Science*, 4(1), 18-26.

48. Vaida, G. (2003). Toil and trouble: violence and stress at work costs economies billions of dollars. The Sunday Times. Retrieved November 3 2003 from www.sundaytimes.co.za.
49. Wilcock, A. (1998a). An occupational perspective on health. Thorofare, N.J.: Slack Incorporated.
50. Wilcock, A. (1998b). Reflections on doing, being and becoming. The Canadian Journal of Occupational Therapy, 65(5), 248-258.
51. World Health Organisation. (2002). New research shows workplace violence threatens health services. Retrieved December 4 2003 from www.who.int/mediacentre/releases37/en/.

Appendices

Appendix one: Information sheet

My name is Claire Henshall and I am currently studying at the University of Cape Town for a Masters degree in occupational therapy. As part of this course I am required to complete a research project. I am interested in investigating how people adapt to cope with stress at work.

To collect information for my study I will:

- Shadow you while you carry out your work tasks to find out what your work is like. The purpose of this is to enable me to familiarise myself with the environment in which you work and increase my understanding of your work.
- Ask you to complete a questionnaire. This questionnaire consists of both demographic and open-ended questions. The purpose of the questionnaire is to help me to understand the pressures you face at work.
- Carry out in-depth interviews. The purpose of this is to explore in more detail some of the issues that arose during the observation and in the questionnaire.

If you are willing to participate in this study, the following commitment is required:

Work shadow:

I would like to spend **one full working day** observing you as you carry out your standard work tasks. You would be expected to carry on with your tasks as you would on any other working day.

Questionnaire:

I will give each of you a copy of a questionnaire to fill in. It is anticipated that this will take you approximately **two hours** to complete. The questionnaire can be filled in at a time and a place that is convenient to

you, although you will need access to a computer. It would be appreciated if this could be filled in timeously as the information you supply is needed before the interview phase of this research can take place.

Interviews:

Of the five people who have agreed to participate in this study, three will be asked to take part in the interview phase of the research. Selection of the people to participate in this part of the study will take place once the observation and questionnaires have been completed. I cannot say who the people selected will be at this stage. Each person selected will be asked to participate in one interview, which will be of **approximately two hours** duration. These interviews will take place at a time and a location that is convenient for you.

During the interviews the researcher will make use of a tape recorder to record what you say.

After information obtained from each participant has been analysed, you will be asked to comment on the findings of the study to ensure that what is said is an accurate reflection of your contribution. This process will be done telephonically or via email.

Involvement in this study is entirely voluntary. If you would like to withdraw from the study you will be free to do so during the data collection phase. However, once the analysis of the results occurs it will not be possible to remove your contribution from the record. Although the researcher will make use of what you say in the final report to illustrate the concept being researched, anything you do or say will be kept anonymous when I write up my findings.

The information you provide for this study will not be used by your company in your work appraisals. The company will not have access to the questionnaires or the transcripts of the interviews and has been informed of this by the researcher. The researcher intends to give the company a summary of the final outcome of the research undertaken.

This summary will not refer to any participant by their name and if use is made of what the participants say in this document every attempt will be made to ensure that the identities of those quoted are not revealed to your company

If you need to contact me my telephone number is..... or you can email me at mjclaire@mweb.co.za

Appendix two: Consent form

Title of project: An investigation into the management of work occupations to achieve adaptation

Name of researcher: Claire Henshall

Please complete by answering all the questions below.

Do you understand the implications of your involvement?	YES/NO
Have you read the subject information sheet?	YES/NO
Have you had opportunities to ask questions and discuss the study?	YES/NO
Have you received satisfactory answers to all your questions?	YES/NO
Have you received enough information about the study?	YES/NO
Have you spoken to the project leader named above?	YES/NO
Do you understand you are free to withdraw from this study?	
• Without giving any reason for withdrawing?	YES/NO
• And without affecting your future with this company?	YES/NO
Do you agree to take part in this study?	YES/NO
1 Subject (Name in block letters) <div style="text-align: right;">Signature Date</div>	
2 Researcher (Name in block capitals) <div style="text-align: right;">Signature Date</div>	

Please attach a business card to the front of this sheet

Appendix three:

QUESTIONNAIRE:

All responses to the questions will remain anonymous and will be used to illustrate aspects of the research being undertaken and will under no circumstances be revealed to your employer in any way what so ever to reveal your identity.

Please document responses in the areas provided below: (Please place an "X" in the chosen response where appropriate. The boxes have been designed to expand as you type and please do not add additional rows or columns to this spreadsheet.)

Name:

Date of Birth:

Gender:
Male (M)
Female (F)

Job title

Job Description

Please summarise your day to day tasks.

What are your key performance area's? (KPA'S)

How is the effectiveness of your job measured ?

Please list the 5 most vital aspects of your job in your view.

How many of the key aspects of your job are under your direct control and influence?

Please describe the details that are not under your direct control and influence.

How much reliance do you have to place on others for the achievement of your assigned responsibilities? (percentage of tasks)

How much autonomy do you have in your day to day activities?
 What is the extent that decisions are required to be referred to others for ratification?

Do other people view your job as important? If yes, please state who and in what way?

Do you have a personal assistant?

Do you have aspirations or ambitions beyond your current position?

Please explain whether or not in your view your current position is conducive to you achieving these goals.
 What are the main restrictions or promoters, please provide details.

Number of years with company: _____

Number of years in present job: _____

Marital status:

Single (S)	_____	_____
Married (M)	_____	_____
Living with partner (LP)	_____	_____
Widowed (W)	_____	_____
Divorced (D)	_____	_____

Number of children: _____

Ages of children:

0 - 6 (PS)	_____	_____
7 - 12 (AS)	_____	_____
13 - 18 (AHS)	_____	_____
18 - 25 (LS)	_____	_____
Over 25 (LH)	_____	_____

Other dependents:

Number of dependents other than children: _____

Please provide details of any dependents, specifically the nature of the relationship and their age. _____

Your current level of education: _____

Standard 8
 Matric - with University exemption
 Matric - without University exemption
 Technicon Degree
 University Degree

Provide details of other Post Matric Qualifications _____

Details of formal and informal training:

Please provide details of formal training undertaken in the past year. _____

Was this training relevant to your day to day activities? Provide details to support your response by illustrating where the training fell short or where you were able to effectively implement the learnings. _____

Please describe the nature of informal training that you have been exposed to in the past year. _____

By whom is this usually provided? _____

Compare the effectiveness of the Informal training relative to the formal training. _____

Time spent on the job

How much time do you spend working per week? _____

0 to 40 hours
40 to 60 hours
60 to 80 hours
over 80 hours

What are your standard hours? _____

Do you receive compensation or time off for overtime worked? _____

For an average day what is your normal start and end time?

Start time: _____

End Time: _____

How often do you take work home:

Every day _____

One or twice a week _____

Less frequently _____

How often do you work on the weekends?

every weekend _____

twice per month _____

the odd weekend _____

never. _____

How often do you have a full lunch hour:

every day _____

once or twice a week _____

never _____

Environmental factors

What aspects of the work environment are conducive to high levels of productivity? Please provide details. _____

What aspects of your current work environment are not conducive to high levels of productivity? Please provide details. _____

What aspects of the environment would you change, provide details? _____

What level of congruence do you have between your personal values and the values of the organisation? (Percentage)
Please provide details of differences. _____

Does the organisational culture promote efficient and effective working?
Please explain where the organisational culture is effective. _____
Please explain where the organisational culture is ineffective. _____

Do you have a close friend at work? _____

Explain what effect this relationship has on your ability to carry out your work. _____

Describe the extent and nature of the relationships that you have with your colleagues: _____

Is there a formal mentoring program in operation? If yes please provide details _____

Who do you turn to for advice, please provide details of the person, role, whether or not they are employed by the organisation etc. _____

Physical Factors

Describe the level of your current health:

- Good
- Poor
- Very good
- Excellent

Number of days sick leave taken in the last year? _____

Assess and comment on the effect of your job as follows:

- impact on physical well being?
- impact on mental well being?

Enjoyment / satisfaction

Assess out of 10 your overall satisfaction with your current job. _____

Please provide an explanation for the score chosen. _____

Do you have fun at work, please explain? _____

Please rate your overall satisfaction with the quality of output that you regularly produce, out of 10. _____

Please provide an explanation for the score chosen. _____

Please list the aspects of your job that you enjoy doing the most?
How frequently do you perform these aspects? (percentage of time) _____

Please provide an explanation for the score chosen. _____

Please list the aspects of your job that you find to be repetitive.
How frequently do you perform these aspects? (percentage of time) _____

What is your view of work:

- Necessity
- Part of career development
- Best of the available alternatives
- I do this job as I get a lot out of it
- This is the perfect job for me

Do you feel that your efforts are appreciated by your colleagues and superiors? _____

When was the last time you were thanked for the work done? _____

Impact of Stress

What factors in your view contribute to stress in your job? Please provide a full explanation of all the factors. _____

Please explain how you deal with stress in the work place. _____

What impact does stress at work have on your home life?
Please explain this in as much detail as possible quoting examples to illustrate the view. _____

How do you prioritise tasks in your daily schedule? _____

When was your performance last formally assessed? _____

What were the main performance areas raised during this evaluation?

What aspects were praised? _____

What aspects were highlighted as requiring development? _____

Have you modified or changed your behaviour as a result of this appraisal? Please explain what aspects you changed and how you have assessed the success of this behaviour modification. _____

Have you received 360 degree feedback in the last year? If yes, what were the key issues raised? _____

Free time / Leisure activities

Please details the extent of client entertainment outside of normal working hours. _____

What format does this entertainment normally take and to what extent is your spouse or partner involved in these activities? _____

How do you spend your free time? Provide details of your primary leisure time activities. _____

Do you feel that you have sufficient time to do all the things you need to do outside of work? _____

Please describe your families view of your work. _____

Is your family supportive of your job? _____

When was the last time you cancelled leisure as a result of work issues? What was the impact of this and did you manage to "make it up"? _____

Please rate the extent of the correlation between your leisure activities and your work activities? _____
 High
 Medium
 Low

Needs analysis:

Please rate the extent to which you find that the the environments listed below fill the need described? Please provide explanations for scores less than 100%

<u>Need</u>	<u>Work Environment</u> %	<u>Other environment</u> %	<u>Comments</u>
Seek new experiences	_____	_____	_____
Being in control	_____	_____	_____
Belonging to a group	_____	_____	_____
Seeing yourself as unique	_____	_____	_____
Access to different experiences	_____	_____	_____
Evidence of competence	_____	_____	_____
Feedback of positive performances	_____	_____	_____
Predictability	_____	_____	_____
Freedom from mental or physical harm	_____	_____	_____
Respite from activity	_____	_____	_____
Opportunity to reflect	_____	_____	_____

General comments: _____

Appendix four: Job description

The Area Managers have direct contact with these members of staff:

The report to the: Regional manager

They manage the: Store managers

They liaise with the: Operations administrative manager

Training facilitators

Display controller

Window dressers

Merchandise managers

Buyers

Shop fitting

Group credit

They get advice from the: HR department and Industrial Relations (IR) department on matters related to IR matters or disciplinary procedures.

1. Manages human resources:

- Recruitment, Selection, Training and Development
 - To select potential employees using job / person specifications as laid down by company requirements
 - To develop new and existing employees using company training materials and in-house training courses
 - To monitor and review employees' performance by way of regular performance appraisals
- Leadership and Motivation of Subordinates
 - To provide a spirit of motivation and team work within the area
- Management of Industrial Relations
 - To encourage harmonious Industrial Relations in the work environment by promoting open and honest communication

- To deal with Industrial Relations fairly, timeously and effectively
- Promotion of Employment Equity
- To actively recruit and train Employment Equity candidates
- To identify Employment Equity candidates internally and provide necessary training and development

4. Manages the promotion of exceeding customer service

- To promote ongoing in-store training
- To conduct regular mystery shopping
- To deal with customer complaints timeously and efficiently
- To promote a culture of service excellence

3. Manages marketing:

- To monitor promotions on a weekly basis
- To ensure store managers have planned effectively to cover all tasks at hand
- To implement national promotions
- To communicate feedback to the marketing department on a monthly basis

4. Manages merchandise:

- To ensure that store merchandise profiles are correct relative to the individual customer base
- To monitor presentation and display of merchandise in line with the company standards
- To conduct regular store visits
- To ensure that a unified national image is projected at all times

5. Manages controllable expenses and company assets:

- To monitor and correct out of line situations on a monthly basis by analysing monthly B.O.R.s
- To set up plans for correcting over-expenditure

- To maintain profit awareness amongst store managers by regular feedback sessions
- To ensure that regular stock counts are conducted and that corrective measures are taken in high-loss areas
- To complete security reports and checklists to ensure that all systems and procedures are adhered to in order to maintain stock loss levels within company parameters

6. Identifies and exploits business opportunities:

- To be aware of the economic and demographic situations within the area
- To monitor competitor activity in local areas
- To identify and motivate expansion opportunities

Appendix five: Questions for interviews

1. Please think of a difficult incident that occurred at work that you think you handled well.

- What was the incident?
- What did you do?
- What were your initial actions?
- How did these change over the course of the incident?
- What did you think about before, during and after the incident?
- Why was the outcome successful?
- How did you evaluate whether or not your actions and thinking about the issue were effective?
- What was the outcome?
- Was there anything about you as a person that helped this successful outcome?
- Was there anything in the environment that helped this successful outcome?
- Was there anything about the job itself that helped this successful outcome?

2. Please think about a difficult incident at work that you feel you handled unsuccessfully.

- What was the incident?
- What did you do?
- What were your initial actions?
- How did these change over the course of the incident?
- What did you think about before, during and after the incident?
- Why was the outcome unsuccessful?
- How did you evaluate whether or not your actions and thinking about the issue were effective?

- What was the outcome?
- Was there anything about you as a person that resulted in this unsuccessful outcome?
- Was there anything in the environment that resulted in this unsuccessful outcome?
- Was there anything about the job itself that resulted in this unsuccessful outcome?

3. Do you think other people at work note successes and failures?

- Who do you think notices these things?
- What do you think they are looking at?
- What effect do you think this has on you and how you carry out your work?
- What do you think the results of this appraisal could be?

4. Do you always react to difficult situations at work in the same way?

- If yes, why do you think this is? What effect do you think this has on you and your abilities to handle work?
- Do you always think about the same thing in response to a situation?
- If no, what influences your reactions?
- How do they change?
- What do you think is your most successful way of dealing with a difficult situation?
- Has how you react to difficult situations changed over time, for instance from the time when you first started working to how you react now?
- Has your thinking changed?
- What effect does this have on your ability to cope with difficult situations at work?

5. If you have too much to do during the day

- What is your first reaction to this situation?
- How do your thoughts and actions change as you cope with the situation?
- What happens when you don't use your time effectively?
- What happens when you do?
- How do you evaluate this outcome?
- What happens to you personally when you don't use time effectively?

6. What happens if you have too little to do

- How do you deal with this situation?
- What is the result of this?

7. Your work is very unpredictable and gives you very little time to think.

- How do you handle this situation?
- What do you do to manage this situation?
- What do you think about that helps you to handle the unpredictability of the job?
- What effect does this have on you and your ability to carry out your work effectively?

8. How do you react when policies and procedures change at work?

- What is your initial reaction and thinking process and how do your actions and thinking change as you implement this new policy?
- How do you evaluate whether your actions have been successful or not.

9. Knowledge:

- What kind of knowledge is necessary to deal with difficult situations at work? Carry out your work effectively?
- How is this knowledge acquired?

- How do you identify that you need to gain further knowledge?
- How do you use the knowledge that you have acquired?
- What do you do with this knowledge/ how do you use it to carry out your work effectively?
- Where do you learn the best?
- What factors influence your ability to learn?
- Do you think specific retail training and courses help you to carry out your job?

10. Skills:

- Name an aspect of the job you are very good at, apart from people skills to be discussed later, that helps you to deal with difficult situations at work?
 - How did this skill develop?
 - What things influenced how you acquired this skill?
 - What effect does have this skill have on your ability to carry out your work? Especially handling difficult situations.
 - Why is this skill important in your work?
 - Do you think it is the most important skill of the job?
- Name a skill you still need to develop
 - Why do you think you need this skill?
 - How would you go about developing this skill?
 - What would enhance the development of that skill?
 - Why do you not have this skill already?
 - What outcome does not having this skill have on your ability to handle difficult situation at work?

11. What do you need to know about people in order to carry out this job? And to deal with the stresses of the job?

- What social skills are particularly important in this job?
- Why are they so important?
- How do you develop these skills?

- What is the outcome of having good people skills in your ability to handle difficult situations at work?
- How do you go about ensuring good IPR's between you and your staff?
- And between the different staff members under your management?
- What contributes to bad IPR's at work? What do you do about this? What effect does it have on your ability to handle difficult situation at work?
- What do you think about when you are dealing with the people at work?
- How do you recognise if other people are stressed? What do you think about this? What do you do about this?

12. Relying on others:

- What do you do in order to ensure that others do their jobs effectively?
- What influences your ability to carry out this task effectively?
- What result does this have?

13. Attitude:

- **Emotions:**

- Does your mood influence how you cope with difficult situations at work?
- In what way does it have an effect?
- What are the consequences?
- How does it influence what you think and do?
- Does the fact that on the whole you are satisfied at work influence your ability to cope?
- Does the fact that you are enjoying work influence how you cope at work?
- What effect does it have when you are doing repetitive boring work and how does this influence how you cope with difficult situations at work?

- **Values?**
 - What are your own values?
 - What values do you think are necessary to carry out your work?
 - How do you go about balancing your own values and those necessary for carrying out the job effectively?
 - Are you always successful? What happens to you if you are not successful?
- **Motivation?**
 - What motivates you?
 - How does this motivation influence how you deal with difficult situations at work?
 - How does it influence your thinking?
 - What outcome does this type of motivation have for you?
- **Personality?**
 - What kind of person do you think you are?
 - How does your personality influence how you cope with difficult situations at work?
 - How does it influence your thinking?
 - What outcome does this have for you?

14. Choice:

- What influences how you make decisions in relation to stressful situations in this job?
- How do you go about make choices in this job?
- Is this method effective?
- What kinds of things do you need to think about before you can make a choice?
- What happens when you make a good choice?
- What happens when you make a bad choice in the job?

15. Control:

- What do you do to ensure that all the aspects of the job are under your control?
- How does this influence your thinking?
- Does being in control influence how you cope with difficult situations?

Appendix five: Introduction to the informants

Name	Gender	Marital status	Number of children	Ages of children	Education and experience	No. of year with company	No. of years in present job	Sick leave in last 2 years
John	Male	Single	One	2	Diploma in retail management. Spent two years as a trainee area manager learning about the job and working as a store manager	2 years	3 months	None
Alice	Female	Divorced, living with partner	Three	Over 25 left home	Matric without exemption. Learnt how to do job through experience	14 years	7	2 weeks
Charles	Male	Divorced, living with partner	Two, with sole custody	13 and 18	Matric with exemption. Learnt how to do job through experience	14 years	3 years as senior area manager	None
Tom	Male	Married	Two	4 and 7	BA (History). Originally a teacher and then in planning and operations department doing administrative job	11 years	4 months	None
Simon	Male	Married	None	N/A	Diploma in retail management, B.Tech in last year of studies. Starting working in retail as school boy	5 1/2 years	One month as senior manager	None