

# **Report to Ad Hoc Committee for Future of OT Education**

## **Topic: Faculty Shortages**

### **Committee members:**

Ada Boone Hoerl, MA, COTA/L; Jody Bortone, Ed.D., OT/L; Joanne Foss, PhD, OTR/L, and Janet Jedlicka PhD, OTR/L, FAOTA

### **Committee Charge:**

1. How do we identify and develop a model to put OT / OTA students on a career track for future roles in academia?
2. What are the best practices and what can be learned from other professions?

The committee met via conference call on 3 separate occasions, information was researched and shared among the committee. The group focused on models and targeted initiatives to increase the number of potential educators, as well as qualified researchers. Both will be needed to meet the dual demands of developing evidence to support intervention and providing education for all occupational therapy professionals. Cultural issues of the profession and historical ways of doing things were discussed and reviewed in terms of the impact of barriers and facilitators in the implementation of new initiatives. Based on the research of best practices from other professions, we are proposing three broad areas for consideration by the task force to begin to address the faculty shortage at all educational levels.

### **1. Development of a Center for Educational Excellence as a collaborative effort between AOTA and AOTF. This center could provide resources for new and experienced educators related to curriculum, pedagogy, the scholarship of teaching and cutting edge educational research.**

The Center for Educational Excellence could be responsible for:

- a. Dissemination of educational research and practice regarding pedagogy, curriculum, and faculty development.
- b. Facilitation of faculty professional development at all levels of occupational therapy and occupational therapy assistant education across the career continuum. The educational continuum spans student to faculty to program director to senior researcher.

- c. Provision of a venue for sharing and publishing of occupational therapy educational research. The committee supports the development of an online journal devoted to best practices in education and career preparation for faculty occupational therapy educators and researchers.

## **2. Development of an infrastructure to support education as a recognized practice area in the occupational therapy profession. This infrastructure is needed to create a pipeline of future educators across the continuum.**

- a. Development of specific approaches to increase the visibility of education as a practice area and increase the understanding of the possible roles of an educator. Strategies to address this might include showcasing younger educators who are making a difference in varied educational settings.
- b. Development of white papers that specifically address the qualifications of occupational therapy faculty at technical, masters, and research universities. Information could include guidelines on the traditional missions of various institutions, and responsibilities and educational preparation of faculty.
- c. Development of a system to identify, mentor, and support potential educators early in their occupational therapy assistant or occupational therapy programs; facilitating transitions for students with specific interests or goals. Support and guidance for faculty could be provided at entry and transition points in their careers.
- d. In addition it is recommended that the profession make a concerted effort to collaborate with other qualified professions to support the education and research needs of the profession. For example development of dual degree programs in collaboration with Masters or PhD programs in the basic sciences (Examples; neuroscience, public health, etc.) Students in the early stages of their graduate programs may be attracted to occupational therapy, providing additional opportunities for career advancement and increasing the expertise of best practices in education.

## **3. Strengthening the accreditation standards for occupational therapy education to include specific standards that address the role of education in all aspects of practice at both the occupational therapy and occupational therapy assistant levels.**

- a. Principles of teaching and learning are valuable contributors to the practice of occupational therapy in a wide variety of settings. For example therapists teach compensatory skills, basic skill of daily living, develop and present home programs, and provide consultation to community agencies.

A stronger statement explicit in the preamble would enhance the role of teaching and learning in best practices.

- b. In addition specific standards related to principles of education should be developed in the Section B of the content standards and strengthened in the intervention and leadership and management standards. This could result in a stronger understanding of the roles and responsibilities of occupational therapy educators.

Respectfully submitted,

Janet Jedlicka PhD, OTR/L, FAOTA (Task Force Chair); Ada Boone Hoerl, MA, COTA/L; Jody Bortone, EdD, OT/L and Joanne Foss, PhD, OTR/L.

## **Addendum: 2008 Ad Hoc Report**

### **American Occupational Therapy Association Ad Hoc Committee to Address Faculty Shortages**

#### **Final Report to the Board of Directors August 2008**

##### **Charge/Issue:**

The committee was charged by the President to develop recommendations to address current and anticipated faculty shortages as senior faculty at many educational institutions approach retirement. In order for the Centennial Vision of the profession to be achieved, academic programs must be able to produce a diverse and prepared workforce ready to address society's changing needs. The available data indicates that there is currently a vacancy rate exceeding 8 % among full-time faculty members in occupational therapy (OT) educational programs and 6% among full-time faculty members in occupational therapy assistant (OTA) educational programs (AOTA, 2008). In addition, the profession is experiencing a growth in new program applications at the same time that many of our experienced faculty members are approaching retirement.

Specifically, the Committee was asked to address the following two key issues:

- How can the profession develop a pool of qualified faculty members to fill the existing and projected needs?
- How can the profession plan for the future to ensure that the needs of the profession for qualified faculty and academic leaders are being met on an ongoing basis?

The committee consisted of 6 members, including program directors and experienced faculty members across the country, and represented both OT and OTA educational programs. The committee met regularly from February through August 2008 through teleconferencing and email communications. In order to fully address the charge, the committee engaged in thorough discussion, reviewed current literature, and networked with other program directors and faculty to identify issues affecting the current shortage and identify appropriate recommendations.

To identify the issues affecting the faculty shortages, the following areas were researched: the 2007 AOTA Faculty Workforce Survey (AOTA, 2007), issues related to faculty shortages in other professions, barriers to faculty development, issues related to recruitment and retention of faculty, resources to support faculty development, and current strategies being implemented to address the current shortages. The committee recognized and wants to stress that in order to effectively address the current and anticipated future shortages in faculty, it is critical that all stakeholders accept responsibility and work collaboratively to increase the pool of qualified faculty candidates and support these individuals as they pursue a career in academia. These

stakeholders included AOTA leadership, program directors and current faculty members, fieldwork educators, and clinicians.

### **Ad Hoc Committee Members:**

Janet S. Jedlicka, PhD, OTR/L (Chair) (University of North Dakota-OT, ND)  
Rebecca R. Bahnke, MHS, OTR/L (Parkland College-OTA, IL)  
Jody Bortone, EdD, OTR/L (Sacred Heart University-OT, CT)  
Tia Hughes, MBA, OTR/L (Florida College of Health Sciences-OTA, FL)  
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Neil Harvison, PhD, OTR/L (AOTA Liaison)

### **Key Recommendations:**

Based on the literature review, discussions with other program directors and among the ad hoc committee, the following key recommendations are proposed. The committee developed strategies for the short range (2008-2010), middle range (2010-2012), and long range (2012-2017). Three key areas were identified: (1) faculty recruitment; (2) education; (3) mentoring & support. The table summarizing these recommendations can be found in the appendix. The top four recommendations are summarized here.

**Recommendation 1:** AOTA and the profession recognize academia as a practice area and *develop recruitment initiatives* to encourage individuals to enter academia as a career choice. In addition, it is recommended that the Association include academia as a practice area when revising existing recruitment and promotional materials.

It is recommended that the Association develop recruitment materials for OT and OTA practitioners at all stages of the career span to consider a transition to education.....  
*“Behind every great occupational therapy practitioner is a great educator”*. Corporate sponsorships for this marketing campaign could be sought from potential employers of graduates. This has been a successful model in other professions such as nursing. Finally, the AOTA membership should be made aware of the faculty shortage through the marketing materials, which may heighten interest from OT practitioners.

**Recommendation 2:** AOTA sponsor *continuing education options* for clinicians and existing faculty member interested in further exploring academia. It is recommended that a committee be appointed to develop a comprehensive continuing education plan including a detailed analysis of projected costs. This could begin with promoting articles and papers in existing journals and at conference to gauge the level of interest before investing in more costly continuing education options.

A key theme that emerged in the literature review and discussions with various stakeholders was the need for continuing education and opportunities for interested parties at all levels regarding the faculty role. This included OT practitioners interested in becoming fieldwork educators and full-time faculty members and new faculty members

interested in further developing skills/resources for teaching and research. Opportunities to network with clinicians to explore the possibility for a career in academia, including exploration of career/life goals, exploration of how a faculty position will potentially match, exploration of opportunities afforded with advanced academic degrees. The committee is recommending that a concerted effort be placed on this area by sponsoring faculty development workshops at AOTA Conference, round table discussions, designing self-study resources, and online course work for individuals interested in exploring the faculty role.

**Recommendation 3:** Develop *mechanisms such as social networks for mentoring and supporting* emerging academic leaders and faculty in the profession.

The committee is recommending that AOTA provide a mechanism for mentoring/supporting emerging leaders and individuals interested in exploring opportunities for a career in academia. This could be achieved by continuing to partner with AOTF to develop professional development circles similar to those recently established for researchers in the profession and program directors. The proposed online social networks and opportunities at conference could also provide a useful resource to achieve this goal and provide opportunities for faculty to develop relationships with other faculty members and share resources related to course development, teaching strategies, and assessment methods.

**Recommendation 4:** Develop a *resource site* for sharing information (and other technological supports).

The resource site could include posting of faculty vacancies, opportunities for post-doctoral research opportunities, and teaching fellowships. In addition, teaching and pedagogical resources such as syllabi, course materials, curriculum designs, model curriculum could be included.

### **Supporting information and projected costs:**

#### **Recommendation 1: Develop marketing materials.**

- Charge staff to develop recruitment materials to be distributed among OT practitioners that highlight the faculty shortages and promote academic careers.
  - Initial staff hours to develop **proposal for scope of recruitment initiatives** = 24 hrs. @ \$60/hr.= \$1,440.
  - **Note:** Final costs are dependent on the scope of the recruitment initiatives developed in the staff proposal (e.g., in-house flyers versus brochure versus DVD, etc.) The Committee acknowledges that this may be a long-term plan based on the Association's marketing budget and established priorities.
- Charge staff to investigate potential corporate sponsorship of a recruitment campaign for educators. The Committee noted the successful Johnson & Johnson Campaign for nursing educators.

- Staff hours: 16 hrs. @ \$60/hr.= \$960.
- Charge staff to develop and add an “Occupational Therapy in Academia and Research” to the existing “Role of OT Fact Sheets” available on the AOTA Web site and to publish an article on the fact sheet in OT Practice.
  - Staff hours to write the fact sheet= 8 hrs. @ \$60/hr.= \$480.
  - Staff hours to copyedit fact sheet= 2 hrs. @ \$60/hr.= \$120.
  - Staff hours to post fact sheet= 0.5 @ \$60/hr. = \$30

**Recommendation 2: Committee to develop a comprehensive continuing education program plan that identifies current needs and projected costs.**

- Form a committee of 6 volunteer members to develop a comprehensive continuing education program plan. The committee will meet via conference calls and materials will be shared on SharePoint and live online meetings. The plan would be submitted for consideration by the President on or before February 15, 2009 and include a cost analysis for each step of the plan. The first stage of the plan would focus on low-cost initiatives such as conference presentations and articles in OT Practice.
  - Costs: Staff hours = 130 hrs. @ \$60/hr.= \$7,800.

**Recommendation 3: (1) Continue professional development circles in corroboration with AOTF and (2) Develop additional mentoring and support system for academic leaders and faculty in the profession.**

- Charge staff to develop a proposal in corroboration with AOTF for a professional development circle (similar to the one for program directors).
  - Costs: Staff hours = 30 hrs. @ \$60/hr.= \$1,800
- Charge staff to develop an AOTA-sponsored forum for this targeted group at the AOTA annual conference.
  - Costs: Staff hours = 30 hrs. @ \$60/hr.= \$1,800
- Charge staff to identify options and costs of developing an online social network.
  - Costs: Staff hours = 8 hrs. @ \$60/hr.= \$480
- Request PRODEC and OTAPDEC to develop and promote a program to have graduate students serve as guest lecturers as a means of identifying future educators for the profession.
  - Costs: Staff hours = 16 hrs. @ \$60/hr.= \$960
- Request PRODEC and OTAPDEC to develop and promote a program to have each program director bring a new or junior faculty with them to the Spring program directors’ meeting.
  - Costs: Staff hours = 8 hrs @ \$60/hr.= \$480

**Recommendation 4: Develop a resource site for sharing information**

- Charge staff to identify the costs and information needed to develop and maintain an online resource site for faculty.
  - Costs: Costs: Staff hours = 8 hrs. @ \$60/hr.= \$480

- Note: Cost to develop and maintain a resource page to be determined.

### **Background information:**

The issues surrounding the current and anticipated shortages of faculty in all levels of occupational therapy educational programs are multifaceted and complex. The Ad Hoc Committee formed by the President thoroughly researched the issues involved.

As a baseline, the committee reviewed the recently completed 2007 Faculty Workforce Survey (AOTA, 2007) and the Academic Programs Annual Data (AOTA, 2008). Key issues found in this data included:

- Vacancy rate among academic programs has been consistently at 8-10% for full-time core faculty over the last 3 years.
- Median age of the faculty workforce is 50.
- Median age of program directors is 53.
- Salary discrepancies among academic institutions and between academia and clinical practice.
- Increased teaching load that faculty carry secondary to not being able to fill vacancies with qualified faculty applicants and the impact this has on scholarship/research productivity.
- Average faculty tended to enter academia on average 10-12 years following graduation. The question was further explored as to what role AOTA and other parties can play in promoting entry into practice earlier in their career.

The Committee followed up with listserv surveys and roundtable discussions with OT and OTA faculty to confirm the issues facing faculty. In addition, the Committee undertook a review of the literature and researched other related professional groups to identify if they were experiencing similar issues and what initiatives they were undertaking to address these issues. The related professions surveyed included: (1) nursing, (2) physical therapy, (3) speech pathology, and (4) social work.

Based on the literature review and surveys, the following barriers for pursuing a career in academia were noted:

- ***Issues related to women in higher education:*** (1) Women's roles and a frequent disjointed career path with possibly taking off time to raise families, etc. (2) Gender inequities in higher education. (3) Immobility of spouse or significant other in finding work.
- ***Issues related to the profession's beliefs about educators:*** (1) Many occupational therapists and occupational therapy assistants do not enter academia until after the age of thirty. By the time an individual is in their 30's, other life demands make it much harder to complete the necessary degrees and academic requirements. (2) Many individuals in the profession do not consider education and academia equal career choices to other practice areas.

- ***Issues related to finances:*** (1) Faculty salaries and benefits are often not competitive with other clinical positions. Frequently, individuals experience a significant pay cut to pursue a faculty position. (2) Limited options for financing education (graduate assistantships, tuition remission or waivers, etc.)
- ***Issues related to role change:*** (1) Insecurities about role change from being a master clinician to being a novice faculty member (confidence and intimidation factors). (2) Issues directly related to teaching (effective pedagogy, instructional design, curriculum design, etc.). (3) High workloads associated with academia and fluid boundaries between work and personal life.
- ***Issues related to degree requirements:*** (1) Concern related to the fact that many current faculty members have doctorates in related areas, but not necessarily OT. (2) Concerns over the type of degree preparation. (3) Issues related to a clinical doctorate versus a traditional academic terminal degree.
- ***Issues related to faculty turnover/retention:*** (1) Data from other areas of practice indicate that faculty turnover is costly and has an impact on limited institutional resources. (2) Once faculty are recruited, how do we as a profession support these individuals and foster ongoing professional development? Resources needed include mentoring, helping people evaluate personal professional goals, learning/negotiating systems, developing a plan for development of a career plan that fits with the promotion and tenure system at institutions, and evaluating the type of institution and how it fits with career plans/goal.

It became evident that these issues were consistent in a number of related professions that are practice based and have a high percentage of women practitioners (e.g., physical therapy; nursing, speech pathology, social work). All of these professions are experiencing faculty shortages. It appears that with the exception of nursing, each of the professions are exploring strategies to address these issues, but are no further advanced than occupational therapy. Nursing has a major marketing initiative with a corporate sponsor, but will not see the impact of this campaign for some time to come.

The Committee identified the need to develop a pipeline to recruit, provide information, resources, and support to increase faculty applicants for all practice settings. Program directors and faculty need to target students and young professionals to encourage them to pursue opportunities for fieldwork education, academia, and other opportunities for career advancement.

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## Appendix:

### Proposed Actions Faculty Shortage Grid Faculty Work Force Ad Hoc Committee: August 2008

The Committee identified a number of issues and proposed actions for the profession. A comprehensive plan was developed which expands beyond the key priority areas identified in the report. There are three primary areas presented (1) Faculty Recruitment, (2) Education, and (3) Faculty Support, Mentoring and Retention. The actions are proposed across three phases from short-range, middle, and long-range phases. The order of each proposed action is not intended to reflect a prioritization within each phase. There will be overlap between the areas.

|                            | Short-Range Phase (2008-2010)  | Middle Phase (2010-2012)  | Long-Range Phase (2012-2017)   |
|----------------------------|--|---|--|
| <b>Faculty Recruitment</b> | <p><u>Recruitment Strategies:</u> (1) Recruit OT practitioners to become Fieldwork II Educators. This should be handled on a local basis from both the institution and the surrounding OT groups. (2) Recruit fieldwork educators for adjunct and other faculty positions. (3) Recruit leaders in state OT Associations for academia.</p> <p><u>Clinical Partnerships:</u> Develop partnerships between faculty &amp; clinicians (to share education/research roles).</p> <p><u>Marketing:</u> Market academia as a practice area. Develop marketing materials for OTs across career span to transition to education. (Like nursing “Behind every great OT practitioner is a great OT educator”). Develop marketing materials (postcards, flyers, Web pages, articles, research, brands, slogans) which address the career option of OT academia.</p> <p><u>Pipeline of Alumni to Faculty:</u> Develop pipeline for Alumni to Adjuncts, Adjuncts to Research, and Adjuncts to full-time faculty (OTA/OT).</p> <p><u>Doctoral Teaching:</u> Prepare advanced practice doctorates to meet faculty shortages.</p> <p><u>Adjunct to FT faculty:</u> “Grow your own” faculty from adjuncts (ongoing). Recruit adjunct faculty members</p> | <p><u>Recruitment Strategies:</u> (1) Recruit fieldwork educators to become adjunct faculty members. (2) Target early recruitment of fieldwork educators, on-site evaluators, publishing clinicians.</p> <p><u>Fieldwork Education:</u> Develop fieldwork educators &amp; laddering into academia.</p> <p><u>Communication &amp; Resource Sites:</u> Centralize communication for recruitment, education, and support. Develop centralized online resource pages for faculty positions, scholarships for doctoral education, and mentors in education. Evaluate and update changes in communication needs on a regular basis.</p> | <p><u>Recruitment Strategies:</u> Maintain and revise faculty recruitment and marketing materials to address changes in practice and education.</p> <p><u>Marketing:</u> Market for OT faculty across pipeline.</p> <p><u>Communication &amp; Resource Sites:</u> Evaluate and update changes in communication and resource needs on regular schedule. Maintain and improve AOTA online resources for; (1) educational materials (syllabi, teaching materials, etc.), (2) positions available in OT education, (3) OT and OTA mentors in education, and (4) scholarships for doctoral education.</p> |

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|  | to join college faculty. This may happen within the academic institution for which the adjunct faculty member is working or be shared functions across two or more academic programs. |  |  |
|--|---|--|--|

## Proposed Actions Faculty Shortage Grid

### Faculty Work Force Ad Hoc Committee: August 2008

|                  | Short-Range Phase (2008-2010)  | Middle Phase (2010-2012)   | L<br>20  |
|------------------|--|--|--|
| <b>Education</b> | <p><u>Presentations:</u> Present ad hoc committee findings and proposals at AOTA Conference (booth, forum, workshop, PD meetings).</p> <p><u>Model Career Planning and Decision Making:</u> Draft model pipeline/decision tree for faculty development across career orientation and work, (1) map career goals/life goals – how will a faculty position match personal expectations?, (2) identify indicators for choosing PhD, OTD or other doctoral degrees, and (3) identify role changes from clinician to educator.</p> <p><u>Partnerships:</u> Develop partnerships to promote OT education with focus on developing: (1) corporate partnerships between AOTA and corporations to market OT education, and (2) professional partnerships with state OT Associations (newsletters, conference presentations) to highlight pipeline for faculty development.</p> <p><u>Continuing Education Programs:</u> Develop AOTA sponsored comprehensive continuing education plan to address teaching &amp; academia. Suggested topics include: (1) incorporate educator in OT and OTA curriculum based on ACOTE Standard B.9.7., (2) develop goals and activities in teaching, service, and scholarship, (3) define differences of expectations based on Carnegie classifications of the institution, (4) develop a CV versus a resume, (5) address content on adult learning theory, teaching/learning styles, instructional design, needs assessment, learning objectives, design of learning activities/course materials to meet learning objectives, evaluation methods, legal issues.</p> <p><u>Academic Practicum:</u> Develop professional rotations/practicum in teaching in academia.</p> <p><u>Leadership Forums:</u> Develop Leadership Forums focused on the transition from clinician to academia and the transition from student to academia.</p> | <p><u>AOTA Collaboration with Academia:</u> Develop publications, tutorials, and modules on pedagogy to assist transition from fieldwork educator (FWE) to faculty based on AOTA collaboration with academic programs.</p> <p><u>AOTA Professional Development Tools -</u><br/>Develop continuing education options on (1) Transitioning from Clinician to Educator that can be disseminated via self-paced, conference, or online delivery, and (2) Develop guidelines for specialty certification in education.</p> <p><u>AOTA Continuing Education Courses:</u> Develop AOTA Continuing Ed Course(s) on Transitioning to Academic (self-paced, conference, online). AOTA may assist in this transition by offering courses and education in mentorship so that the faculty may work with the new educator fostering a transition that leads to retention.</p> <p><u>Marketing Programs for Fieldwork Educators:</u> Develop recruitment and educational materials such as flyers, articles in OT Practice, and through its new voluntary FWE credentialing program. Link FW Education initiatives with faculty recruitment.</p> <p><u>Continuing Education for Fieldwork Educators:</u> Develop fieldwork educators' knowledge and skills in; (1) designing learning objectives and activities, (2) understanding and developing fieldwork curriculum designs, and (3) collaborating/teaching with academic fieldwork coordinators.</p> <p><u>Corporate Partnerships:</u> Continue developing corporate partnerships to promote OT education.</p> <p><u>COTA Education:</u> Encourage development of more COTA bridge programs to Master's OT programs (to develop OTA faculty – COTA transition to OTA faculty).</p> | <p>Ma<br/>dev<br/>edu<br/>car<br/>ele<br/>occ<br/>edu<br/>Res<br/>upc<br/>(1)<br/>tea<br/>pos<br/>in e<br/>edu</p> |

**Proposed Actions Faculty Shortage Grid**  
**Faculty Work Force Ad Hoc Committee: August, 2008**

|   | <b>Short-Range Phase<br/>(2008-2010)</b>   | <b>Middle Phase (2010-<br/>2012)</b>   | <b>Long-Range Phase<br/>(2012-2017)</b>  |
|---|--|--|--|
| <b>Faculty Support, Mentoring &amp; Retention</b> | <p><u>Faculty Mentoring:</u><br/>Develop mentors for OT and OTA faculty (local, state, national) and disseminate via an AOTA online resource site.</p> <p><u>Professional Development Circles:</u> Develop professional development circles for emerging leaders focused on Transition to Academia. Link Leadership Forums with promoting new leadership OT education and research.</p> <p><u>Faculty Retention Surveys:</u><br/>Conduct AOTA sponsored national surveys on faculty retention to address three groups; (1) OTs with doctoral degrees (focus: past history of employment as a faculty member and factors contributing to leaving higher education), (2) OT and OTA faculty currently employed in academic programs (focus: likelihood of leaving within the next 3 years and factors contributing to that decision), and (3) academic program coordinators (focus: number of faculty resignations, their perception of reason for leaving, number of positions lost).</p> | <p><u>Faculty Mentoring:</u> Develop AOTA supported Faculty Mentorship programs by using online resource sites for; (1) connecting adjunct and full-time faculty teaching similar courses from a variety of institutions (like the listservs for program directors and academic fieldwork coordinators), (2) professional development plans &amp; activities, and (3) support of fellowships and advanced practicum in teaching in academia.</p> <p><u>Communication &amp; Resources:</u><br/>Develop online resource site for (1) faculty positions, (2) educational materials, (3) scholarships for doctoral education, and (4) continuing education on transition into academia.</p> <p><u>Fellowships &amp; Incentives:</u><br/>Continue strengthening corporate partnerships to; (1) support fellowships, (2) provide incentives for higher education, and (3) to promote OT recruitment &amp; education.</p> <p><u>Faculty Retention Surveys:</u><br/>Routinely conduct AOTA-sponsored national surveys to address faculty retention needs and plans/strategies.</p> | <p><u>Communication &amp; Resources:</u> Routinely evaluate and update AOTA online resource sites for (1) educational materials (syllabi, teaching materials, etc.), (2) faculty positions, (3) mentors in education, and (4) scholarships for doctoral education.</p> |

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