(AOTA) OT Education Research Forum

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Janice P. Burke, PhD, OTR, FAOTA
Jyothi Gupta, PhD, OTR/L
Debra Hanson, Ph.D., OTR/L
Barb Hooper, PhD, OTR, FAOTA
Neil Harvison, PhD, OTR/L, FAOTA
Introductions and recent history on the issue

Janice P. Burke, PhD, OTR, FAOTA
Chair, Occupational Therapy Program Director’s Council
Chair, Future of Education Ad Hoc Task Group on Research and Scholarship on Education
Why are these initiatives so important to educators and the profession?

- Centennial Vision - emphasis on evidenced based practice.
- Emerging concern in PRODEC
- Professional Development
- Tenure
Some Immediate Initiatives:

EDUCATION SUMMIT
OCTOBER 4-5, 2013

Downtown Hyatt Regency - Atlanta, GA

• Plenaries
• Peer reviewed presentations and round tables.
• Poster sessions.
• Information will be available in November this year.
How do these efforts differ from AOTA/AOTF?
OCCUPATIONAL THERAPY RESEARCH AGENDA

The Occupational Therapy (OT) Research Agenda identifies the major research goals and priorities for occupational therapy research. The goals and priorities span five categories: Assessment/Measurement, Intervention Research, Basic Research, Translational Research, and Health Services Research. A sixth category, Research Training, addresses capacity building to accomplish the research goals and priorities.

Three of the five research categories—Intervention Research, Translational Research, and Health Services Research—are recognized as being of paramount importance for the next decade because it is imperative that the efficacy and effectiveness of occupational therapy interventions be ascertained; that the optimal dose, frequency, duration, and location of occupational therapy interventions be determined; and that the salient elements (or active ingredients) of occupational therapy interventions be identified. The study of occupational engagement and participation, problems in engagement and participation, and interventions to restore, prevent or compensate for problems in engagement and participation is complex and requires the collaboration of scholars from various disciplines, thus placing occupational therapy research in an interdisciplinary context.

This emphasis on intervention/prevention, translational, and health services research is consistent with the American Occupational Therapy Association’s Centennial Vision of occupational therapy as “a powerful, widely recognized, science-driven, and evidence-based profession.” It is also consistent with the National Institutes of Health (NIH) Roadmap, the initial National Priorities for Comparative Effectiveness Research put forth by the Institute of Medicine of the National Academies (June, 2009), the Testimony of the Disability and Rehabilitation Coalition before the Interagency Committee on Disability Research (August 13, 2008), the Effective Health Care Program of the Agency for Healthcare Research and Quality (AHRQ) (2008), and the comments by Senator Baucus (D-Mont) on Introduction of The Comparative Effectiveness Research Act of 2008 (August 1, 2008). Simply stated, our clients (patients) want the most effective interventions for their performance problems and occupational therapy practitioners want to provide them with these interventions. However, for practitioners to provide the most effective interventions, occupational therapy interventions must be defined, described, and tested, so that practitioners know what is effective for which clients. Treatment effectiveness takes into account considerations such as: what mixture (e.g., interesting task + progressive grading of cognitive components of task = modelling) of...
Research Agenda

5 Categories:

• Assessment/measurement
• Intervention Research
• Basic Research
• Translational Research
• Health Services Research
Research Agenda

In examining occupational therapy interventions, priority is given to interventions that are client-centered, occupation-based, theory-driven, and manualized. Recognizing that the science of occupational therapy practice is in its infancy, the priority is broadly defined to include preliminary work leading to efficacy (research under tightly controlled conditions) or effectiveness (research under real-world conditions) trials; that is, it includes “proof of concept” studies of interventions (including quantitative, qualitative, and mixed methodologies); pilot, feasibility studies of interventions; and, single-subject intervention studies.

<table>
<thead>
<tr>
<th>Research Categories</th>
<th>Major Research Goals</th>
<th>Research Priorities</th>
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</thead>
<tbody>
<tr>
<td>Assessment/Measurement</td>
<td>Develop screening instruments to determine functional ability across the lifespan, with acceptable sensitivity and specificity.</td>
<td>Screening instruments to identify performance deficits in persons of all ages with chronic disorders and disability.</td>
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<td>Develop outcome instruments sufficiently responsive to measuring change in daily life activities, including activity and participation.</td>
<td>Instruments for simultaneously evaluating person—occupation—environment (context).</td>
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<td>Develop and evaluate strategies for identifying and/or measuring the health impact of environments on activity engagement and participation in daily life.</td>
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<td></td>
<td>Develop and evaluate strategies for identifying and/or measuring the influence of activity engagement in daily life on health.</td>
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President Clark’s “Future of Education” initiative

- Research & Scholarship in OT Education
- Established June 2011
- Senior Academic Leadership “Dean’s Group”
- To address broad higher education issues as hub with pods or spokes addressing more specific issues
  - Fieldwork
  - Faculty shortage
  - Research capacity
  - Growing the profession
  - Research & Scholarship in Education
The committee is addressing the following question:

How will we develop the profession’s capacity for scholarship and research in education?

- Surveys
- Key articles & resources
The committee has identified the following:

- OT faculty need access to and understanding of the range of methods to conduct education based research;
- Clarification of OT specific educational strategies
- The importance of an articulated conceptual framework
- Clarification of research based education questions that need to be asked specific to the Profession, Educational and Health Institutions, the Student Learner, the Faculty Educator
<table>
<thead>
<tr>
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Issues and trends in higher education impacting OT/OTA education

Neil Harvison, PhD, OTR, FAOTA
Director of Accreditation and Academic Affairs
American Occupational Therapy Association
Key issues in higher education:

- Costs
- Affordability
- Productivity
Federal government’s obsession with outcomes and transparency

What are the measures that indicate “productivity” in an academic program:

- Retention rates
- Degree completion rates
- Time to graduation
- Certification pass rates
- FW pass rates
- Employment rates
What about costs versus outcomes?

- The **federal government** is concerned about what value they are receiving for their investment in student loan programs.

- **State governments** are concerned about the investment in state funds and as these shrink where the priorities should be directed…… state appropriations for colleges and students sunk by 7.6 percent in 2011-12, the largest such decline in at least a half century.

- **Institutions** are looking at which programs are the most viable- outcomes versus cost.
Lumina Foundation Degree Profile

- Pushing for a shift to competency based outcomes to measure student learning outcomes.
- European model of shorter degree programs focused on preparation for professional practice versus the need for a foundation in the liberal arts.
Entry Level Degrees

• This is an issue that will not be going away for either OT or OTA?
• What do we need to know in order to make an informed decision before other do it for us?
• Where does specialization belong in our educational structure?
Role of simulation in education.

- Institutions are looking at cost effective ways to address the clinical preparation component of the programs.
- What is the role of clinical simulation labs in clinical preparation?
Interprofessional Education Collaborative

- Six Health Care Organizations:
  - AACN (Nursing)
  - AACP (Pharmacy)
  - AACOM (Osteopathic Medicine)
  - ADEA (Dental Medicine)
  - AAMC (Medicine)
  - ASPH (Public Health)
- Convened in 2009 - OT/ PT/ SLP were not included.
- In 2011 generated a report on core competencies for all healthcare professions.
Interprofessional Education/Practice

Interprofessional Professionalism Collaborative

• Initiated by APTA this group was conceived as a collaboration of "Doctoring Professions in Healthcare."
• Occupational Therapy was not invited to participate.
• In 2010, the IPC refined the 43 interprofessional professionalism behaviors for health care professionals.

• American Association of Colleges of Nursing
• American Association of Colleges of Osteopathic Medicine
• American Association of Colleges of Pharmacy
• American Dental Education Association
• American Physical Therapy Association
• American Psychological Association
• American Speech-Language-Hearing Association
• Association of American Medical Colleges
• Association of American Veterinary Medical Colleges
• Association of Schools and Colleges of Optometry
• National Board of Medical Examiners
Health Care: Primary Care Role

• Primary care has emerged as a central part of the health care reform debate.
• Central primacy of its role in regard to integration, coordination and comprehensiveness of care and the value of the patient/practitioner relationship as being at the epicenter of health care delivery.
• Professions are collecting evidence to support their role in primary care and the reimbursement dollars that will follow.
• Many are linking this role to the “doctoring” professions and OT needs to provide evidence that it is an equal player with these other professions.
Health Care: Telehealth

- Telehealth is the use of electronic information and telecommunications technologies to support long-distance clinical health care, patient and professional health-related education, public health and health administration.
- Prominent in the health care reform proposals is the role of telehealth is expected to play to address the needs of rural and underserved populations.
Health Care: Other

• Health, Wellness and Prevention
  – Not a new concept but gain we will see a greater emphasis on prevention and wellness in the health care reforms.
  – Potential role on addressing the needs of an aging population.
• Populations Based Approaches
Report on the findings of the survey on scholarship and research in occupational therapy education

Jyothi Gupta, PhD, OTR
Chair, Commission on Education
The purpose of the survey was to gather data on the extent to which occupational therapy faculty members engage in scholarship and research on teaching and learning.

Distributed through direct e-mail to 2,255 faculty members in February 2012.

520 (23%) of the faculty members completed the survey.

450 (86.5%) identified themselves as full-time core faculty members. The remaining respondents identified themselves as either part-time or adjunct faculty. The results reported today reflect the 450 respondents who identified themselves as full-time faculty members.
How often do you use evidence from education research studies to inform your teaching?

- Never: 10 (2%)
- Seldom: 37 (8%)
- Occasionally: 147 (33%)
- Frequently: 255 (57%)
How often have you engaged in educational research or scholarship?

- Never: 110 (25%)
- Seldom: 134 (30%)
- Occasionally: 129 (29%)
- Frequently: 72 (16%)
Have you completed any research in education?
Research methods

- Quantitative: 169 (47%)
- Qualitative: 157 (44%)
- Mixed methods: 196 (54%)
- Action research: 54 (15%)
- Other, please specify: 26 (7%)
Research collaboration

- Individual: 186 (45%)
- Collaborative within OT: 186 (45%)
- Interprofessional: 152 (37%)
- Not Applicable: 63 (15%)
How many educational research and scholarship articles have you published in the last 7 years?

- 0 articles: 256 (61%)
- 1 article: 49 (12%)
- 2 articles: 34 (8%)
- 3-5 articles: 40 (10%)
- 6-10 articles: 22 (5%)
- 11-15 articles: 12 (3%)
- 16+ articles: 7 (2%)
Where were you published?

- Peer reviewed journal: 147 (50%)
- Other journal: 38 (13%)
- Chapter in book: 77 (26%)
- Not applicable: 108 (37%)
- Other, please specify: 28 (10%)
Does your institution recognize educational research or scholarship in the promotion and tenure process?

- Yes: 330 (76%)
- No: 51 (12%)
- Not Applicable: 53 (12%)
Funding

- Pilot funding from my educational institution: 80 (19%)
- AOTF funding: 6 (1%)
- Federal funding: 17 (4%)
- Other foundations: 26 (6%)
- Not applicable: 302 (71%)
- Other, please specify: 36 (8%)
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Center for Occupational Therapy Education (COTE) at CSU

Barbara Hooper, PhD, OTR, FAOTA
Director, COTE
Current Educational Research at COTE

• Determining how the construct of occupation is addressed in curricula.
• Opportunities for connection: Investigating the implementation of integrative learning in occupational therapy.
• Systematic review of occupational therapy educational scholarship: 2000-2010.
An International Systematic Mapping Review of Educational Approaches and Teaching Methods in Occupational Therapy

• Rationale for the study
• Research Questions
• Data Collection
• Data Analysis

Curriculum (n=34)

Student Learning, Perspectives (n=19)

Learning Environment (n=8)

Faculty Issues (n=5)

Assessment (n=1)

Teaching Methods/Educational Approaches (n=62)

Conceptual & Descriptive Papers (n=77)

Qualitative (n=19)

Quantitative (n=16)

Mixed Methods (n=18)
<table>
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<tr>
<th>Level of Intervention</th>
<th>Description</th>
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<td><strong>Level 1</strong></td>
<td>Participation - participants’ views on the learning experience</td>
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<td><strong>Level 2a</strong></td>
<td>Attitudes / perceptions - changes in the attitudes, beliefs, or perceptions as a result of the intervention (including self-assessment of knowledge, growth, and self-efficacy)</td>
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<td><strong>Level 2b</strong></td>
<td>Knowledge / skills - the acquisition of concepts, procedures and principles, thinking / problem-solving, psychomotor and social skills</td>
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<td><strong>Level 3</strong></td>
<td>Behavioral change - documents the transfer of learning to the workplace or willingness of learners to apply new knowledge &amp; skills.</td>
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<td><strong>Level 4a</strong></td>
<td>Change in organizational practice - wider changes in the organizational/delivery of care, attributable to an educational program</td>
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<tr>
<td><strong>Level 4b</strong></td>
<td>Benefits to patient / clients – changes in the health &amp; wellbeing of patients/clients as a direct result of an educational program.</td>
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**Modified Kirkpatrick Hierarchy**

Level 1: Participation (n=11)

Level 2a: Attitudes/Perceptions (n=13)

Level 2b: Knowledge/Skills (n=15)

Level 3: Behavioral Change (n=3)

Level 4a & 4b (n=0)

Teaching Methods/Educational Approaches (n=21)

Curriculum (n=8)

Student Learning Perspectives (n=9)

Learning Environment (n=3)

Faculty Issues (n=0)

Assessment (n=1)
Educational Approaches

- Experiential/Active
- Interprofessional Learning
- Cooperative Learning
- Community-Based
- Occupation-Centered Learning
- Confluent Education
- Inquiry-Based Learning
- Constructivism

Times Cited

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Teaching Methods

- Eclectic Methods
- Problem-Based Learning
- Teaching Style/Skill
- Case-Based Learning
- Reflection
- Groups/Team-Based

Times Cited
Thematic Analysis

- Integrative Learning
- Paradigm: Learning Driven
- Call for Reform
- Reasoning Processes
- Complexities of Practice

Times Coded
Summary of Findings

- Predominance of conceptual and descriptive inquiry focused on local learning situations.
- Conceptual frameworks for research were rarely used.
- Research questions and hypotheses were inconsistently stated.
- An array of eclectic teaching methods predominated.
- Integrative learning and how students should learn were strongly emphasized.
- Complexities of practice constituted the strongest rationale.
- Learning was assessed primarily at the level of student perceptions.
Implications for Building a Science of Education for OT

• Priority #1: Deepen and Diversify Descriptive Studies of Local Learning Situations
• Priority #2: Develop Profession-Specific Conceptual Frameworks for Learning
• Priority #3: Measure Outcomes Beyond Student Views of the Learning Experience and Perceptions of Change
Future Research

• Systematic review of scholarship on:
  – Student perceptions of learning experiences,
  – Specific skills and content areas,
  – FW education
    • Preliminary Findings
Issues and trends in fieldwork

Debra Hanson, Ph.D., OTR/L
COE- Fieldwork Education Representative
Drivers for Change in Fieldwork Education

Workplace demands
Client needs
Reduced funding
Shrinking numbers of traditional fw placements
Increasing student numbers
Marketing OT programs to attract students

McAllister, Paterson, Higgs and Bithell, 2010
Workplace Demands

Higher workloads and decreased staff numbers require the new graduate to display a high level of work readiness

Challenge:
- Transitions in first year of professional practice
- Capabilities for inter-professional practice
- Increased workforce mobility and global/international practice

Hodgetts, et al., 2007; Zwarenstein, Goldman & Reeves, 2009; Kinsella, Bossers & Ferreira, 2008

Research:
- What changes are indicated in fw structure to support work readiness?

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Workplace Demands and FW structure

Challenge:

Are student provided opportunities in level I fw that prepare them for level II placement? Does level II fw prepare student for practice?

Leonardelli, C., Caruso, L. (1986)
Johnson, et.al., 2006

Research:

What theoretical frameworks are used to organize level I placements; what are learning outcomes for level I placement?
What minimum skill competencies should students demonstrate at the conclusion of level II placement?

AOTA, 2007
Workplace Demands

Increasing demands for students to meet required legal expectations and policy directives such as criminal background checks, immunization requirements, etc.

Challenge:
• How can the administrative workload be effectively managed for fieldwork placement?

Research:
• What is the expected workload of the AFWC? Support recommended?
  – No research in OT; limited studies in other allied health professions
Client Needs

To protect consumers, regulation of reimbursement of services provided by students to patients; State supervision requirements

Challenge:
Can the student gain technical and clinical reasoning skills to work safely and competently if not given opportunity to work independently?

Research:
What kind of supervision is needed to enable students to provide skilled services to patients?
Client Needs

Students completing fieldwork in role-emerging practice settings can be supervised by an experienced occupational therapist a minimum of 8 hrs per week.

Challenge:
Is this supervision enough to ensure quality of services provided?

Research:
What competencies are required in role-emerging practice settings? Are consumers satisfied with quality of student services?
Client Needs and Models for Student Supervision

Supervision Models

- 20 articles, 2000 - 2010
- Qualitative/Descriptive
- Small population/One academic program
- International
- More info available in other disciplines other than OT

- Conclusion: Insufficient evidence to apply to situation
## Supervision Models

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<tr>
<th>Model</th>
<th>Count</th>
<th>Methodology</th>
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<tr>
<td>Project-based placement</td>
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<td>Lit review, survey, focus group</td>
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<td>1:1 model</td>
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<td>Survey</td>
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<tr>
<td>Role-Emerging Model</td>
<td>8</td>
<td>Program description, survey, focus group interviews</td>
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<tr>
<td>Inter-Agency Model</td>
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<td>Lit review</td>
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<tr>
<td>Collaborative Model</td>
<td>5</td>
<td>Survey, focus group, interviews</td>
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Respondents include primarily students and OT staff

Majority of publications are international
Insufficient Funding

Provision of fieldwork placements for students results in decrease of productivity or generation of revenue

Challenge:
- Does contribution of students to service provision negate costs associated with student education? Should universities pay to offset costs?

Research:
What are costs/benefits associated with student placement? Perceptions of fw educators, employers, clients?
Research: Cost/Benefits for Fieldwork

Benefits of education to students
- Development of professional identity, competency, problem-solving and decision-making skills

Benefits to employers
- Improved staff learning and staff morale
- Improved quality of patient care
- Recruitment of new graduates

Costs/Benefits of Fieldwork
- Do benefits of FW offset productivity loss?
- Explore benefits to site, and fw educator

Thomas, et.al., 2007
Chung, et.al., 1980

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Less Traditional Placements, More Students!

Ratio of potential fw educators to students:
6.91 licensed OT’s per OT students
4.88 licensed OTA’s per OTA students

Roberts & Simon, 2012

Challenge:
• Why don’t fw educators take on students?

Research:
• What are fw educator perspectives on working with students? Their training and support needs?
Less Placements, More Students: Implications for pedagogy of learning

Developing Pedagogy of Fieldwork Education:
Propositional knowledge and research-based evidence meets professional craft knowledge derived from practice
- learning portfolios
- reflection on practice
- transformative learning
- peer learning
- experiential learning

Smith & Higgs, 2010

Research: What is the normative pedagogy for fw learning...learning by immersion, observation and guided practice or intentional learning activities?

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Less Students, More Placements: Implications for FW educator training

FW Educator Training

- Multiple methods
  - Readings in fieldwork, group discussion, journal reflection, professional and peer supervision, mentoring, self-evaluation, student feedback and evaluation, short workshops, formal certificate course, online training

  Rose, et.al., 2010

- How does training impact fw educator confidence? availability of fw sites? quality of student learning?
OT/OTA Program Marketing to Attract Students

• Opportunities linking curriculum and practice
• The practice experience and scholarship of faculty
• Opportunities for cultural and international placement
• Student-centered, individualized learning opportunities
• Best practices application (client-centered, occupation-based, evidence-driven, inter-professional practice)
• Technology support/resources for learning
• Building scholarship in practice
• Academic and community partnerships
Fieldwork Education: Issues of Concern

- A framework for fieldwork education
- Pedagogy for fieldwork education
- Best practices in the profession and fieldwork education
- Models for student supervision
- Assessment of student competency

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Fieldwork Education: Issues of Concern

• Role emerging practice and fieldwork
• The Academic Fieldwork Coordinator role
• Preparation and support of FW educators
• Costs and benefits of fieldwork education
• Recruitment and retention of fieldwork sites
AOTF/AOTA Scholarship in Teaching and Learning Initiatives

Andrea Bilics, PhD, OTR, FAOTA
Chair-elect, Commission on Education
“Scholarship of teaching is problem-posing about an issue of teaching or learning, study of the problem through methods appropriate to disciplinary epistemologies, application of results to practice, communication of results, self-reflection, and peer review.”

--Cambridge 2001
AOTF SoTL Program History

- 71 participants (2007-15, ’08-21, 09-35)
  - OT faculty and 1 OT-CE educator
  - 1 participant from Israel
  - Several OT programs sponsored multiple faculty
  - 10 mentors, 1 was a former participant
AOTF SoTL Program Accomplishments

- Outcomes:
  - 58% participants completed projects
  - Several published papers
  - Several poster presentations by participants and leaders at various conferences
  - Collaboration with the Center for Occupational Therapy Education (COTE) at Colorado State University
Lessons Learned

- Importance of Support
- Group
- Mentoring
- Common interests among participants
- Need to focus efforts to effect broader change
What’s next for the SoTL Program?

• Inquiry groups
• Focused topics
• Teaching Commons
Teaching Commons*

Developing a plan for the future
Your Task: Start to develop the framework

• Small groups according to interest
  – Conceptual framework for OT education
  – Pedagogy
  – Capacity
  – Instructional methods
  – Competency
  – Learners and learner resources
  – Socialization to the profession
• Group work on Research Framework
• Walk around and see other groups’ work
Your Task: Start to develop the framework

• What does that look like?

• How do we as a group identify priorities?

• Where are the gaps? What are our objectives?

• Is there anything else missing?

• What are the priorities?
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Definitions:

- **Conceptual Framework for OT Educational Research:** Conveys the key concepts involved in educational practice and research, interrelates these key concepts, and offers propositions about their mutual influences on teaching and learning under specific conditions; a conceptual framework helps organize research topics and questions, captures where researchers have and have not directed their attention, and situates a study within broad issues facing the profession (Cook, Bordage & Schmidt, 2008).

- **Pedagogy** is the manner in which teaching is delivered to influence the learning context. Instruction is governed by the background, resources, knowledge, experience and environment of the learner.

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Definitions

• **Capacity**: Identification of the human and non-human resources that will be needed to support the development of a research agenda for scholarship and research in occupational therapy teaching and learning. Capacity questions might include: Are sufficient numbers of faculty prepared with the skills to conduct education-based research? Are sufficient resources available at the faculty member’s home institution to support educational research inquiries?

• **Competency** is the level of expertise that is essential for a particular job or task. A competent individual will demonstrate the skill, knowledge, qualification, and capacity to fulfill the job or task. Research addressing competency may assess the preparation of an individual in regard to a particular outcome.
Definitions

• **Learners and learner resources** focuses on who are the learners, in all their diversity, including but not limited to age, abilities, experiential background, cultural backgrounds, etc. It also focuses on the institutional resources that create the learning context and thus impacts learning.

• **Socialization** is the process by which individuals adopt the values, skills, attitudes, norms, and knowledge needed for membership in a given society, group, or organization. Professional socialization is the process by which our students are inculcated to the knowledge, skills, culture and ethos of occupational therapy. This process fosters the development of a professional identity- ways of knowing, doing, being, and becoming.