Canadian Guidelines for Fieldwork Education in Occupational Therapy (CGFEOT)

Guiding Principles, Responsibilities and Continuous Quality Improvement Process

Prepared by the:

Committee on University Fieldwork Education/Comité Universitaire de l’Enseignement Clinique (CUFE/CUEC) of the Association of Canadian Occupational Therapy University Programs/Association canadienne des programmes universitaires en ergothérapie (ACOTUP/ACPUE)

Approved by UFCC, ACOTUP and CAOT
Summer 2003,
Revised – summer 2005
Revised 2011
# Table of Contents

A Vision for Canadian Occupational Therapy Fieldwork Education ........................................2

Section 1: Principles Guiding the Canadian Occupational Therapy Fieldwork Experience .....4

Section 2: Responsibilities of Fieldwork Education Partners................................................5

Section 3: Tools and Processes to Support Quality in Canadian University Occupational Therapy Fieldwork Education .................................................................................8

Appendix A: Fieldwork site agreement...................................................................................10

Appendix B: Fieldwork site profile .........................................................................................12

Appendix C: Student site evaluation form .................................................................Error! Bookmark not defined.

Appendix D: Preceptor experience evaluation form...............................................................22
A Vision for Canadian Occupational Therapy Fieldwork Education

The Committee on University Fieldwork Education (CUFE) of the Association of Canadian Occupational Therapy University Programs (ACOTUP) has reviewed the national guidelines for fieldwork education in response to a number of developments. Feedback from fieldwork partners, shifts in health care environments, changes in occupational therapy practice, and the new profile and core competencies of practice have highlighted the need to update the Canadian Guidelines for Fieldwork Education in Occupational Therapy (CGFEOT) and reduce administrative procedures while continuing to promote excellence in fieldwork education.

Quality improvement is a systems process whereby identified critical indicators can be measured and monitored. The documentation process proposed in the CGFEOT aims to monitor the numerous activities which have been deemed essential to the support and development of a quality experience for all stakeholders in occupational therapy fieldwork education. The 2011 revised version of the CGFEOT is intended to guide fieldwork partners in developing an effective environment for learning, together with fieldwork education resources and student learning opportunities. In addition, the CGFEOT will guide universities in determining appropriate fieldwork education experiences that enable students to integrate academic and fieldwork learning throughout their professional development.

In updating the CGFEOT, CUFE members aim to implement a process which promotes quality and accountability and reflects current best practice in fieldwork education. The guidelines have incorporated input from a variety of sources: consultation with fieldwork partners on the challenges and benefits of providing fieldwork education, a visioning experience by university fieldwork coordinators to identify factors for effective management of fieldwork education, and a review of national and international documents. CUFE acknowledges the commitment of its fieldwork partners (fieldwork
sites, fieldwork educators, on-site fieldwork coordinators, and other team members) in continuing to support a high quality fieldwork education program.

Section 1 of the guidelines includes principles to promote optimum fieldwork education. Section 2 presents the responsibilities of fieldwork education partners: students, preceptors and university programs. Finally, section 3 proposes tools and processes for supporting quality in fieldwork education.
Section 1: Principles Guiding the Canadian Occupational Therapy Fieldwork Experience

These guidelines are intended to ensure that each Canadian occupational therapy fieldwork experience provides excellent learning opportunities and resources and an optimum environment for learning. Students acquire abilities and professional behaviors as well as new knowledge while engaged in fieldwork education. Students, preceptors, onsite fieldwork coordinators, university professors and university fieldwork coordinators are expected to collaborate in linking fieldwork experiences to what students have learned in class. Therefore, it is important to share a common vision for fieldwork education.

The fieldwork experience should:

- Be a collaborative learning experience among students, clients, fieldwork educators, onsite fieldwork coordinators and university programs;
- Be mutually beneficial to students and fieldwork educators;
- Be accepted as an essential part of professional growth for both students and fieldwork educators and fieldwork site;
- Occur in a positive learning environment;
- Consider the teaching methods and learning styles of both students and fieldwork educators;
- Consider students’ learning objectives in relation to their professional development within the context of the fieldwork environment;
- Support students to account for their learning;
- Enable students to link theory with practice;
- Enable students to take an active role within the site;
- Promote satisfaction for both students and fieldwork educators regarding the fieldwork experience;
- Occur anywhere the roles and functions of an occupational therapist can be developed and integrated.
Section 2: Responsibilities of Fieldwork Education Partners

**Students are expected to:**

- Take responsibility for their learning experience and the direction of that experience in partnership with fieldwork educators, onsite fieldwork coordinators, university professors and university fieldwork coordinators;
- Set personal and professional goals before the beginning of the fieldwork experience. Review and adjust them throughout the placement;
- Do preparatory readings before and during the fieldwork experience;
- Uphold legal standards and the Codes of Ethics at all times (CAOT, professional regulatory body, fieldwork site, university program);
- Comply with site and university policies and procedures;
- Increase their understanding of and respect the roles and functions of other team members;
- Develop competencies for the application of the occupational therapy process;
- Increase their understanding of the systems in which occupational therapists practice;
- Learn how occupational therapists contribute to the service delivery team;
- Increase their understanding of and promote the roles and functions of occupational therapists;
- Develop confidence and competence in their practice of occupational therapy;
- Communicate with the university fieldwork professor/ coordinator any time during their fieldwork experience if they encounter challenges in developing their competency profile;
- Provide feedback to fieldwork educator based on their fieldwork learning experience.
- Provide feedback and an evaluation of their fieldwork experience to their university fieldwork professor/ coordinator following each placement;

**Preceptors are expected to:**

- Act as role models for students;
- Become familiar with the university fieldwork education program (learning objectives, educational tools, fieldwork evaluation tool, expected student
performance in accordance with placement level) and with the supervision process;

- Offer a welcoming environment, a comprehensive orientation and provide space for student use, as available within the site’s resources;
- Clearly inform students of what is expected of them, appropriately grade responsibilities and expectations and be available to students to offer appropriate supervision;
- Offer regular and timely feedback based on student performance, including recommendations for improvement;
- Offer a positive and comprehensive learning environment to enable student development within the core competencies required for occupational therapy practice;
- Assist students to develop a good understanding of their “professional growth” with respect to core competencies as described in the *Profile of Occupational Therapy Practice in Canada (2007)* by allowing and promoting time for guided reflection;
- Meet with students to discuss and evaluate their performance at the mid-term and end of the fieldwork education experience;
- Communicate with the university fieldwork professor/coordinator at any time during the placement if the student encounters significant challenges;
- Provide to university fieldwork coordinator a current fieldwork site profile describing learning opportunities and resources;
- Provide feedback by completing a questionnaire with respect to their experience as fieldwork educator (student preparedness, impact of the supervisory experience, administrative support availability, evaluation of pedagogical needs, etc.) and submit it to the university fieldwork coordinator.

**University fieldwork education professors/coordinators are expected to:**

- Assist students to develop a good understanding of their “professional growth” with respect to core competencies as described in the *Profile of Occupational Therapy Practice in Canada (2007)* by offering fieldwork preparation (e.g. orientation and resources) and debriefing sessions (e.g. integration of theory with practice) to students;
- Provide fieldwork educators with orientation and educational resources related to the university academic and fieldwork education programs and the supervision process;
- Coordinate offers and requests for placements and whenever possible match students and sites according to students’ academic and fieldwork profiles and interests;
- Ensure students make suitable choices with regard to establishing a varied fieldwork education profile (clientele and fieldwork settings);
- Offer ongoing support and problem solving to students and fieldwork educators in dealing with student learning challenges;
- Recognize fieldwork partners who contribute time and expertise in supervising students;
- Provide sites with a fieldwork agreement, either temporary or long term, describing the liability and responsibilities of each party;
- Ensure students are provided with appropriate liability coverage and work site insurance;
- Regularly assess the content and quality of supervision given and provide recommendations to fieldwork sites and feedback to fieldwork educators.
- Regularly assess the content and quality of the environment in which the placement occurs to ensure appropriate resources are available and provide recommendations to fieldwork sites.
Section 3: Tools and Processes to Support Quality in Canadian University Occupational Therapy Fieldwork Education

To support the quality of Canadian occupational therapy fieldwork education, the following tools and processes are recommended:

1. The university fieldwork professor / coordinator will ensure that any site used for occupational therapy student fieldwork education has read Section 1 and 2 of this document. An example of a fieldwork site agreement form is outlined in appendix A and may be used for this purpose if the university so chooses.

2. The university fieldwork professor / coordinator will provide each site with a fieldwork site profile to complete. The aim of this profile is to provide important information to the university which enables an understanding of the student learning experience within the site. In light of this intent, the fieldwork site profile is completed by the site representative after consultation with administrators, program managers, professional coordinators, fieldwork educators and all persons involved in the fieldwork education experience. This document will be requested within a reasonable timeframe as determined by both the site contact person and the university fieldwork coordinator. The following list describes information to be provided:

   - Site and contact information
   - Characteristics of occupational therapy services
   - Learning opportunities and resources
   - Administrative resources
   - Site requirements for students
   - Amenities

The UBC fieldwork site profile form is outlined in appendix B and should be completed and returned to jean.hsieh@ubc.ca
Following each fieldwork placement, students should complete a fieldwork site evaluation form. The aim of this evaluation process is to gain an understanding of how the student’s learning experience at the site contributed to his or her professional development. The UBC student fieldwork site evaluation form is outlined in appendix C.

Considering the important formative role assumed by preceptors, universities must support preceptor professional development as related to fieldwork education. It is strongly recommended that the university fieldwork education professor / coordinator collect and analyze preceptor feedback pertaining to quality and availability of university support for fieldwork education including preparedness of students for their fieldwork experience. For this reason, the aim of this process is two-fold. First, to gain an understanding of the preceptors needs and offer university based support. Second, to contribute to upgrading curricular content in accordance with the evolving nature of occupational therapy practice. This form is outlined in appendix D.

3. On a regular basis (to be determined by the university), the university fieldwork coordinator will review the documents pertaining to particular fieldwork sites: the fieldwork site profile, the relevant student fieldwork site evaluation forms, and the relevant preceptor experience evaluations. The university fieldwork education coordinator will compile and analyze the available information and share a summary with the fieldwork site contact person. It is recommended that the university fieldwork coordinator will provide this feedback to the site at least once every 5 years.

4. If issues with a fieldwork site arise, the university fieldwork education professor / coordinator, in conjunction with the fieldwork site contact person, will propose a plan for improving or optimizing the student learning opportunities. When such a plan is put forth, a timeframe will be set regarding improvements to be made to ensure the future quality of the fieldwork education experience for students.
Depending upon specific needs and programs developed, it is anticipated that each university will be responsible for designing and implementing additional quality improvement measures that are deemed appropriate for their region.

Appendix A: Fieldwork site agreement

Please complete and send to jean.hsieh@ubc.ca
Fieldwork Site Agreement

Site Name:

Name of person responsible for occupational therapy student fieldwork coordination and signing on behalf of the organization:

Title of person named above:

University name:

Name of university fieldwork education coordinator(s):

Declaration of Site Representative

☐ I have read and am in agreement with Section 1 of this document, ‘A Vision for Canadian Occupational Therapy Fieldwork Education

☐ I have read and am in agreement with Section 2 of this document, ‘Principles Guiding the Canadian Occupational Therapy Fieldwork Experience

☐ I understand that occupational therapists at this site acting as preceptors for occupational therapy students will have at least one year of experience as a practicing occupational therapist, as per the Canadian Association of Occupational Therapy recommendations.

Signature of Site Representative:

Date:
Association of Canadian Occupational Therapy University Programs (ACOTUP)

University fieldwork education coordinators require information about fieldwork education sites regarding opportunities and resources for student learning. The main goal of requesting a fieldwork site profile is to describe the learning environment in which the student will evolve. The fieldwork site profile or other similar university-specific documents will assist the university fieldwork coordinator and students in making informed decisions about placement selection in order to balance student fieldwork profile as well as meeting their learning needs. Furthermore, information gathered on this form will also be used for the partnership renewal process, by university fieldwork coordinators.

Hence, information available in the fieldwork site profile contributes to promoting excellence in fieldwork education among partners as well as to fulfilling the Canadian Association of Occupational Therapists (CAOT) requirements for Academic Accreditation.
Appendix B: Fieldwork site profile

Please complete and send to jean.hsieh@ubc.ca

University of British Columbia
Department of Occupational Science and Occupational Therapy

SITE PROFILE FOR FIELDWORK

The following information assists the University Fieldwork Co-ordinator when assigning students. It also provides students with the necessary guidelines for the preparation and planning of their clinical experience in your facility.

A. SITE AND ADMINISTRATION

1. Name of Facility: ______
   Address: ______

2. Person who administers O.T. Services:
   Name: ______
   Title: ______
   Telephone #: ______
   Extension: ______
   Fax #: ______
   E-mail address: ______

3. Persons responsible for fieldwork education in particular programs:

<table>
<thead>
<tr>
<th>(1)</th>
<th>Name:</th>
<th>Title:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Telephone #:</td>
<td>Extension:</td>
</tr>
<tr>
<td></td>
<td>Fax #:</td>
<td>E-mail address:</td>
</tr>
<tr>
<td>(2)</td>
<td>Name:</td>
<td>Title:</td>
</tr>
<tr>
<td></td>
<td>Telephone #:</td>
<td>Extension:</td>
</tr>
<tr>
<td></td>
<td>Fax #:</td>
<td>E-mail address:</td>
</tr>
<tr>
<td>(3)</td>
<td>Name:</td>
<td>Title:</td>
</tr>
<tr>
<td></td>
<td>Telephone #:</td>
<td>Extension:</td>
</tr>
<tr>
<td></td>
<td>Fax #:</td>
<td>E-mail address:</td>
</tr>
<tr>
<td>(4)</td>
<td>Name:</td>
<td>Title:</td>
</tr>
<tr>
<td></td>
<td>Telephone #:</td>
<td>Extension:</td>
</tr>
<tr>
<td></td>
<td>Fax #:</td>
<td>E-mail address:</td>
</tr>
</tbody>
</table>

4. Person to whom all clinical correspondence should be directed:
   Name: ______
   Title: ______


5. First day student reports to:
   Name: 
   Title: 
   Place: 
   Time: 

6. Regular working hours are: a.m. to p.m.

7. Can the student email his/her letter of introduction? Yes No
   Can the student expect a reply to his/her letter of introduction? Yes No
   If yes, the reply will be by: (choose selection from drop down box) E-mail

8. Should the student visit your facility before their placement Yes No

9. Dress Code:

10. Is a car required? Yes No
    If yes, full time or part time

11. Other requirements: (NOTE: Students are required to do criminal record checks & have current First Aid and CPR)
    Please State:

B. SERVICE

Please name the occupational therapy services provided in your site under the column labeled "SERVICE". For each service you have named please fill in the adjacent columns to indicate:
   a) age range of clients in that service area,
   b) whether it is at an acute, rehab, or long term care level of service,
   c) the environment of the OT service,
   d) the number of occupational therapists assigned to that service, and
   e) the number of support personnel assigned to that service.

<table>
<thead>
<tr>
<th>SERVICE (state program areas; i.e. mental health, physical dysfunction)</th>
<th>AGE RANGE OF CLIENTS (years)</th>
<th>CONTINUUM OF CARE (i.e. acute, rehab, LTC)</th>
<th>ENVIRONMENT (i.e. hospital, day care, community, school, home)</th>
<th>NUMBER OF OTS ASSIGNED TO SERVICE (part or full time)</th>
<th>NUMBER OF SUPPORT PERSONNEL (part or full time)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
C. LEARNING EXPERIENCE
1. Other Learning Opportunities Available:
   - Supervision (i.e. of support personnel)   Yes☐ No☐
   - Teaching (other than instruction of patients) Yes☐ No☐
   - Administration                          Yes☐ No☐
   - Research                                Yes☐ No☐
   - Professional Growth (in service/education sessions) Yes☐ No☐
   - Inter-departmental Meetings (rounds, conferences) Yes☐ No☐
   - Consultation (inter-disciplinary, family, community agencies) Yes☐ No☐
   - Program Design/Development              Yes☐ No☐
   - Other:

2. Student Preparation:
   If you require students to review specific references prior to the placement, list below or attach these references:

D. SUPPORT SERVICES
1. Library facilities available:                      Yes☐ No☐
2. Accommodation: Male: Yes☐ No☐ Female: Yes☐ No☐
   (If yes, please attach details related to contact person, type of accommodation, costs, etc.)
3. Meals: (available at facility)                    Yes☐ No☐

E. ADDITIONAL INFORMATION
Please attach pertinent documents and/or descriptions to expand on any of the above sections or to include essential information that is not asked above.
Appendix C: Student site evaluation form

UNIVERSITY OF BRITISH COLUMBIA
DEPARTMENT OF OCCUPATIONAL SCIENCE AND OCCUPATIONAL THERAPY

STUDENT EVALUATION OF FIELDWORK EXPERIENCE

The purpose of this evaluation is to facilitate and organize communication between the student and supervisor at the midterm and end point of the fieldwork experience, as well as provide the university program with the students' perspective about the placement.

FACILITY:
SUPERVISOR'S NAME: ____________________________
STUDENT'S NAME: ____________________________ START
DATE: ____________________________
STUDENT'S LEVEL: ____________________________ END DATE: ____________________________

Check the boxes that describe your fieldwork experience.

- [ ] acute
- [ ] physical dysfunction
- [ ] hospital-based
- [ ] urban
- [ ] rehab
- [ ] mental health
- [ ] community-based
- [ ] rural
- [ ] long term
- [ ] combined
- [ ] day centre-based
- [ ] other: ____________________________

State ____________________________

Indicate age span of clients:

______________________________

<table>
<thead>
<tr>
<th>ORIENTATION</th>
<th>MIDTERM</th>
<th>FINAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Were you oriented to the following:</td>
<td>Y</td>
<td>N</td>
</tr>
<tr>
<td>a) physical layout (including: library, cafeteria)</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>b) philosophy and mandate of the facility, general policies (ex: emergency procedures)</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>c) the staff, other team members</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>d) physical layout (including: supplies, equipment …)</td>
<td>☐</td>
<td>☐</td>
</tr>
</tbody>
</table>
e) departmental policies & procedures (ex: charting, home visit, reservations, other …)  

| Comments: |   |   |   |   |   |   |
|           |   |   |   |   |   |   |

<table>
<thead>
<tr>
<th>LEARNING EXPECTATIONS, GOALS &amp; OBJECTIVES</th>
<th>MIDTERM</th>
<th>FINAL</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Y</td>
<td>N</td>
</tr>
<tr>
<td>a) Were learning objectives clearly stated at the beginning of placement?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>b) Were learning objectives negotiated based on resources and your previous experience?</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

| Comments: |   |   |   |   |   |   |
|           |   |   |   |   |   |   |

<table>
<thead>
<tr>
<th>SUPERVISION</th>
<th>MIDTERM</th>
<th>FINAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Did the supervisor:</td>
<td>Y</td>
<td>N</td>
</tr>
<tr>
<td>a) communicate in an effective manner despite possible differences in communication style?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>b) provide you with timely and appropriate feedback (both positive and negative) in a constructive and appropriately discrete manner?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>c) serve as role model or mentor?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>d) use effective demonstration and teaching skills?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>e) consistently clarify expectations?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>f) make themselves available and accessible to questions?</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
g) encourage you to develop self-directed learning skills?

h) encourage you to critically evaluate your own performance?

Comments regarding the supervision process:

Suggestions to further your learning experience through the second half of this placement:
<table>
<thead>
<tr>
<th></th>
<th>Y</th>
<th>N</th>
<th>N/A</th>
<th></th>
<th>Y</th>
<th>N</th>
<th>N/A</th>
</tr>
</thead>
<tbody>
<tr>
<td>a) interviews</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>b) assessments, tests, measures</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>c) develop problem/asset lists</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>d) plan intervention, target outcomes</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>e) implement intervention plans/therapeutic modalities</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>f) documentation</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>g) evaluation of effects of intervention/outcome</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>h) from a client-centred model of practice</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>i) opportunity to exchange with members of the team, department or program and with other students</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>j) opportunity to participate in various meetings:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- in-services, visits to other department</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- unit or program meetings</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- case discussions</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Comments:**

---

**LEARNING EXPECTATIONS, GOALS & OBJECTIVES**

<table>
<thead>
<tr>
<th></th>
<th>Y</th>
<th>N</th>
<th>N/A</th>
</tr>
</thead>
<tbody>
<tr>
<td>a) Was progress towards achieving objectives discussed &amp; re-evaluated regularly?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>b) Do you feel you achieved your learning goals and objectives?</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Comments:

What were the most positive aspects of this placement?

If you could do this placement again, what would you suggest could be done differently?
Do you have any additional comments?

Signature:

Student

Therapist

Date

Copies to:  

Student

Site/program

UBC (with student evaluation)
Appendix D: Preceptor experience evaluation form

THE UNIVERSITY OF BRITISH COLUMBIA

Fieldwork Experience

FEEDBACK

This form provides a venue for clinical sites and fieldwork educators to give confidential feedback to UBC about the Fieldwork Education Program overall. Issues which are student-specific should not be reported on this form, but should be recorded on the CBFE-OT evaluation form and/or discussed directly with the OT Academic Fieldwork Coordinator (AFC).

Site Name: ______
Department: ______
Date of Placement: ______
Placement Level (1/2/3): ______
Fieldwork Educator Name(s): ______

<table>
<thead>
<tr>
<th>ORGANIZATION OF THE PLACEMENT</th>
<th>Yes</th>
<th>No</th>
<th>N/A</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Was your site given sufficient notice that a student was being assigned?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. (If applicable) was your site given sufficient notice that no student was being assigned?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. Was your package and pre-placement information complete, accurate, and received in a timely manner?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4. Were your questions about the placement responded to in a helpful, collaborative, and timely manner by the Academic Fieldwork Coordinator or assistant?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5. Were instructions for forms and procedures clear?</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Comments about organization of the placement:
<table>
<thead>
<tr>
<th>COMMUNICATION</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>6.</strong> Did you receive helpful and timely support in dealing with student (or other) issues?</td>
</tr>
<tr>
<td><strong>7.</strong> Did you access any information on the <em>Fieldwork Education section</em> of the department website? (<a href="http://www.osot.ubc.ca">www.osot.ubc.ca</a>)</td>
</tr>
</tbody>
</table>

*If yes, was it helpful?*

Do you have any suggestions for content you'd like to see included in our section? |

| **8.** Do you receive *The Field Notes* newsletter (UBC OT Fieldwork Education newsletter)? |

*If no, and you would like to be added to our em-mail distribution list (~2-3 times per year), please provide your email address here:*

---

<table>
<thead>
<tr>
<th>STUDENT PREPARATION</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>9.</strong> Did you feel the student(s) were well prepared for their level of placement?</td>
</tr>
</tbody>
</table>

*(Please keep in mind theoretical knowledge related to clinical skills specific to your site or area may not have been covered prior to placement.)*

**Comments about student preparation:**
10. Are student expectations of their clinical education experience reasonable?
   If no, please explain:

GENERAL COMMENT
Is there anything else you would like the UBC Department of OS&OT and/or the AFC to know about your experience with the fieldwork placement process?

Thank you for your feedback, which we will use for quality improvement purposes.

And thank you for acting as a Fieldwork Educator or site for our Occupational Therapy students.

Your participation is a vital part of the OT Program and we REALLY appreciate it!

*** Please email this form back to Jean.hsieh@ubc.ca ***
### MOT Curriculum Map

#### TERM 1

**September – December**
- RSOT 511 Fundamentals of Theory and Practice
- RSOT 513 Health Illness and Occupation
- RSOT 515 Practice Skills and Therapeutic Procedures I
- RSOT 519 Professional Practice I

**Fieldwork Level 1**
- (5 weeks; 4 days per week)
- Exams (1 week)
- Vacation (3 weeks)

#### TERM 2

**January – April**
- RSOT 519 Professional Practice I (continues)
- RSOT 521 Occupational Analysis, Activity and Participation
- RSOT 513 Health Illness and Occupation (concludes)
- RSOT 537 Evidence and Reasoning in Practice (continues on-line)
- RSOT 525 Practice Skills and Therapeutic Procedures II

**Fieldwork Level 1**
- (7 weeks; 4 days per week)
- Exams (1 week)
- Vacation (1 week)

#### TERM 3

**May – June**
- RSOT 519 Professional Practice I (continues)
- Fieldwork Level 2 (7 weeks)
- RHSC 420 Neuroanatomy
- RSOT 519 Tutorials
- Vacation (3 weeks)

#### TERM 4

**September – October**
- RSOT 545 Theory Practice Skills and Therapeutic Procedures III
- RSOT 549 Professional Practice II (continues)
- Fieldwork Level 2 (7 weeks)
- Vacation (3 weeks)

#### TERM 5

**January – February**
- RSOT 549 Professional Practice II (continues)
- RSOT 553 Developing Effective Programs
- RSOT 545 Theory Practice Skills and Therapeutic Procedures III (continues)
- RSOT 547 Evidence for Practice II: Project (continues)
- RSOT 549 Professional Practice II (continues)

**Fieldwork Level 3**
- (2 x 6 weeks or 1 x 12 weeks)
- Vacation (1 week)

#### TERM 6

**May – July**
- RSOT 549 Professional Practice II (continues)
- RSOT 551 Societal and Environmental Influences on Practice (concludes)
- RSOT 553 Developing Effective Programs (concludes)
- RSOT 545 Theory Practice Skills and Therapeutic Procedures III (concludes)
- RSOT 547 Evidence for Practice II (concludes)
- RSOT 549 Professional Practice II (concludes)

**Fieldwork Level 3**
- (2 x 6 weeks or 1 x 12 weeks)
- Vacation (1 week)

**7 Wks**
- 1 Wk

---

*Case-based tutorials run through each term and are integrated into the curriculum*

*Subject to adjustments related to calendar year*

**Aug 2004**
2011 Canadian Fieldwork Retreat

Thursday, January 20th & Friday, January 21st, 2011

University of Toronto, Toronto, ON

REPORT

Respectively submitted by CUFE (Committee on University Fieldwork Education) co-chairs:
Caroline Storr and Margaret Anne Campbell-Rempel

A national fieldwork retreat was held January 20-21st 2011 in Toronto for the Canadian University Fieldwork Education Committee (CUFE) of ACOTUP. Sponsored by ACOTUP and supported by member universities, the meetings included 16 Academic Fieldwork Coordinators/fieldwork faculty representing 12 Universities. Only 2 Canadian Occupational Therapy University programs were not represented (University of Montreal & Université du Québec à Trois-Rivières). The University of Toronto hosted the CUFE retreat.

This retreat occurred at the request of the CUFE membership. During the annual CUFE face to face meeting in June 2010 the membership identified a need to schedule an opportunity to strategize together on 2 major issues. The issues identified were:

1. Increasing capacity for fieldwork education in Canada

2. Continuous quality improvement used in Canadian fieldwork education as reflected within the CGFE-OT-(Canadian Guidelines for Fieldwork Education in Occupational Therapy). Dedicated time was required to consider and build consensus related to a review and proposed revision of this document.

As will be outlined later in this report, the retreat accomplished these objectives. Additionally the retreat outcomes included both a round table discussion focusing on working with the National Fieldwork Placement Service (NFPS) and the subsequent development of an initial strategy to work with the NFPS on issues of mutual concern related to fieldwork education in Canada.

Day One

Day one can best be described as strategic visioning with the development of action plans. The morning began with a poster presentation summarizing the Canadian framework by C. Storr.
This poster had been presented at the WFOT 2010 conference in Chile. Entitled “Promoting and sharing practice education fieldwork: The Canadian model of quality assurance and exchange” this poster focused on quality by outlining the structure, process and outcome of fieldwork education in Canada. Poster authors were Caroline Storr, Susan Mulholland, Ann Bossers, and Jean Pascal Beaudoin. The poster presentation generated considerable discussion in Chile and that feedback suggested that Canadian Occupational Therapy Fieldwork Education practices are advanced as compared to many other countries (ie: China, Japan, Columbia, Chile).

Following the poster presentation, Ann Bossers led the group in a mind mapping exercise. This exercise focused on “a vision for Occupational Therapy Fieldwork in 20 years”. The outcomes of this collaborative exercise were illustrated by statements such as:

- Occupational therapists will no longer be supervisors but rather educators in the clinical field. They will foster learning opportunities for students, and see this as a method of continuing their own education and professional growth through reflection and interactions with students.
- OT fieldwork and student learning will be embedded in the delivery of occupational therapy
- OT fieldwork educator will be a sought after and highly recognized role. Clinicians will view this role as an honor to teach the next generation while meeting one’s professional responsibility, contributing to the development of occupational therapy and of enhanced quality client services.
- The fieldwork educator role will be supported by our OT community, employers, regulators, and both provincial and federal governments by seeing education as an organizational and human opportunity rather than a burden. This support will include recognition of student education in job descriptions, in incentives/benefits and in productivity rules.
- OT in Canada will have an equitable and robust distribution of fieldwork opportunities provincially and nationally well-capable of supporting the number of student OTs enrolled in Canadian programs. These ongoing offerings will offer students a range of possible learning opportunities.
- OT fieldwork education will use cutting edge technologies and ideas to support the development of student centered opportunities which address the current and future practice climate.
- The delivery of clinical education will occur in many configurations. These configurations will be responsive to the needs of the student, the educational environment and the systems in which they are imbedded. Examples of these models include junior students shadowing senior students, and distance supervision.

The mind mapping exercise and poster presentation formed the basis for the group to move into a strategic planning exercise led by Jean-Pascal Beaudoin. The intent and outcome was to develop a strategic plan to advance capacity building for occupational therapy fieldwork education in Canada. In preparation for the visioning exercise, participants collected information
on different programs’ practices and completed a questionnaire that provided input on challenges, barriers, solutions and strategies with outcomes and targets to achieve capacity building (see Appendix 2). At the retreat, through a series of consensus building activities, members screened and prioritized 4 strategies to address the most important challenges. From there, the group delineated the foundation action plan. This strategic plan will provide guidance to the CUFE for the next five years, in order to focus its efforts in capacity building.

Definition of Capacity Building (CB)
According to the Canadian academic programs represented at the meeting capacity building is about the quantity and quality of available practice experiences. This relates to increasing the number of learning opportunities offered in both new and current sites, as well as enhancing the teaching-mentoring competencies of the therapist-educator in guiding students through these learning experiences, within an environment fostering professional growth. It also encompasses the diversity of the fields of practice in which students will have the opportunity to learn about the profession and to develop the required competency to enter practice. This diversity is also expected at the Academic Program accreditation level.

In order to meet the common goal of capacity building, agreement was reached that sharing tools and partnering to recruit, retain, educate and support therapists and sites is needed. While there are many inter-University common goals, there also are University specific needs that will have to be considered. It was agreed that it will be essential to adapt and try new models of education while considering financial and human resources in the current economic climate. Universities will need to explore creative ways to evolve and even transform their ways, where needed. Lobbying and advocacy will be tools to help reach this goal.

By developing more sustainable quality learning opportunities, the university will contribute to the development of the profession, and more importantly, enhance student learning in a variety of occupational therapy services across Canada.

Priorities for the next five years
The first objective reflects the need to gain official support from key Canadian occupational therapy professional organizations with regards to the recognition of the role of educator, in occupational therapists’ job description. This role should be encouraged, supported, and seen as an opportunity for continuing education, rather than a burden, an addition to one’s workload. It should be seen as a nourishing and valorizing activity and a welcomed, shared responsibility to develop the next generation of health care practitioners and professionals. It should also be taken as an opportunity to enhance the quality of services to the Canadian population. In addition to nurturing the occupational therapy profession evidence within the literature supports that preceptorship can also enhance the competency of the practitioner.

*Under the Essential Competencies of Practice for OTs in Canada, 2nd Edition, 2003, Engaging in Professional Development, OTs are required to actively participate in the acquisition of new knowledge and skills. One of the methods to accomplish this is to be involved in the education
CUFE will further explore preceptorship as a recognized role to support the continuing education of occupational therapists, with the Association of Canadian Occupational Therapy Regulatory Organization (ACOTRO), the provincial regulatory bodies and the Colleges.

The second objective aims at optimizing the main tool that CUFE has to support students in their quest to learn the foundation of occupational therapy in another part of the country: the National Fieldwork Placement Service (NFPS). The NFPS also should be helpful in maximizing the use of learning experiences available across the country. It was deemed important to focus on improving this tool as it has great potential, and has far more merits than trying to exchange offers on a one on one basis, among different Universities. Two major challenges emerged: Its short and long term financial viability and the instability of the current service providers (risk that the current NFPS administrator will not renew its contract after December 31\(^{st}\), 2012.) Also, catchment areas, types of recruitment strategies employed (blanket versus targeted; urban versus rural; large cities versus smaller ones) and specific processes in the different regions need to be reviewed, in order to improve the Service, and to develop it into a viable, long term recruitment tool to support the professional education of student OTs. An objective and ongoing mechanism to monitor and evaluate all aspects of the system and its processes, including shifting demands of catchment areas will need to be developed. If allowing students easy access to learning experiences across the country is a value for student learning outcomes or even a philosophical necessity for the occupational therapy programs, financial subsidization of the Service might need to be adopted should a profitable business model not be attainable. The alternative will be to revert to another system, which will also have challenges.

The third objective reflects the need for occupational therapists to obtain more support and recognition for the education of students from their employers and organizations. Similar to the first objective, this objective targets the governments’ decision-makers level: CUFE concluded that it is essential that the productivity measurement and job descriptions be modified to support therapists to have dedicated time and resources to efficiently and positively educate the future generation of health care professionals. There are numerous benefits to having students learning in the different health care organizations and community agencies. The shift to see the financial impact as an investment rather than an expense is required. It was determined that CUFE will seek to lobby support from ACOTUP at the national level, and from Dean’s, via program Chairs, at the regional University level.

The final objective focuses on visibility and sending a clearly worded message at the occupational therapy and health care communities, of the benefits of student education, and of the professional and societal responsibilities of improving capacity. Addressing quantity is one important part of the equation, but offering variety and quality in terms of learning opportunities is the greater part, and a challenge. A marketing and communication strategy is therefore needed to help CUFE succeed in building capacity for the future.

**Conclusion/Deliverables**
Members of the CUFE retreat have developed the strategic plan (see Appendix 1) with objectives that are priorities to develop capacity. The challenge is to allocate resources and to
have access to the right stakeholders in order to have an impact on changing perceptions, mentalities, cultures and processes about student education in the sectors of health care, community, private practice, school systems and industry. During the next 5 years, by seeking and consolidating strategic alliances with ACOTUP, ACOTRO, and the professional associations and by the efficient use of resources allocated to develop this plan into actions, short term and longer term outcomes will be met.

**Day Two**

The Canadian Guidelines for Fieldwork Education in Occupational Therapy (CGFE-OT) were originally developed in 2002/2003. The CGFE-OT (a bilingual document) was revised in 2005. At that time a commitment was made to review the document again in 5 years. As a result, in June 2009 at the yearly CUFE meeting in Ottawa, a task force consisting of 4 Academic Fieldwork Coordinators was struck. The task force, consisting of Audette Bedard, Donna Barker, Carmen Moliner and Jennifer Saunders, circulated a survey to all CUFE members. Using the information gathered revision of the CGFE-OT process was undertaken and presented at the 2010 CUFE meeting in Halifax. Given both the size of the proposed revisions and the implications of a decision, CUFE determined that further discussion was warranted. Based on this first round of feedback, the task force made further revisions to the proposed process in Fall 2010 and then again in December 2010 in preparation for general review prior to the retreat.

In preparation for the discussion of the CGFE-OT, academic programs completed an environmental scan of the continuous quality improvement processes related to practice education within other professions in their respective Universities and provinces. Each CUFE member presented the information they had gathered. According to these verbal reports no other profession identified a national process guiding fieldwork/practice education. Processes described either focused at a University level and/or were only housed within program accreditation standards.

**Conclusion/Deliverables**

An implementation plan was accepted unanimously by the CUFE membership. The entire document is attached for ACOTUP approval (see Appendix 3). The process is outlined below.

<table>
<thead>
<tr>
<th>A Vision for Canadian Occupational Therapy Fieldwork Education;</th>
<th>Accepted and supported by all participants. Will be used in attached format</th>
</tr>
</thead>
<tbody>
<tr>
<td>Section 1 – Principals Guiding the Canadian Occupational Therapy Fieldwork Experience</td>
<td>Accepted and supported by all participants. Will be used in attached format</td>
</tr>
<tr>
<td>Section 2: Responsibilities of Fieldwork Education Partners</td>
<td>Accepted and supported by all participants. Will be used in attached format</td>
</tr>
<tr>
<td>Section 3: Tools and Processes to Support Quality in Canadian University Occupational Therapy Fieldwork Education (Appendices A-D)</td>
<td>Each University commits to collecting this information using a method and format which fits with its processes and needs. Sample templates attached for site agreements, site</td>
</tr>
</tbody>
</table>
Operational Plan:
CUFE is seeking approval from ACOTUP at their March teleconference for the above outlined CGFE-OT process. Once the ACOTUP decision is communicated to the CUFE co-chairs the next steps will be implementation of the process across Canada by CUFE. Steps include updating the information currently held on the CAOT website and then individual university program updates.
This document will also require translation into French.

Final Revision of CGFE-OT (C. Moliner (lead) and task force)
ACOTUP approval (MA Campbell and C. Storr).
Review the CGFE-OT CAOT site accreditation content to update new revised version (JP Beaudoin)
Write OT Now article by task force (D. Barker, J. Saunders(lead) + task force, )
Individual university program updates

NFPS Discussion:
Update round table discussion took place sharing the positive and challenging aspects of this service. An action plan was developed to address some quality enhancements.

Conclusion/Deliverables
Please refer to appendix 4

Summary and Plan for the Future:
This retreat was extremely productive. It resulted in the development of concrete action plans for follow-up with respect to capacity-building, quality improvement and the NFPS. Additionally it fostered collaboration across the committee. A number of actions items have already begun, most notable include a position paper on fieldwork under development for dissemination to CAOT and ACOTRO; and on-going positive discussion to develop a Fieldwork column in OT Now. Thank you to ACOTUP for funding this CUFE initiative.
The overall cost of this retreat is estimated to be approximately $4000.00 (pending final expense report submissions). Given the anticipated $1,000.00 surplus from the initial allocation we have requested through the Education Committee that this excess be applied to an additional CUFE meeting day at the CAOT conference in Saskatoon. This additional time will allow CUFE to both complete their regular business meeting and ensure sufficient time for the group to advance their agendas related to capacity building and working with the NFPS. This request is not intended to set precedent rather to be reflective of the significant number of actions requiring continuity following this retreat. CUFE is requesting the regular full day meeting be held Tuesday, June 14 (9:00-17:00). A verbal report would be provided to ACOTUP in the late afternoon. It is anticipated day 2 would occur on June 15th and be followed by a written report delivered to ACOTUP at a later date summarizing the results of both days.
Additionally we are requesting that an ACOTUP representative be present for the NFPS discussion and service report. We will adjust the agenda accordingly to facilitate this. CUFE will require secretarial support during both meetings.

**Deliverable:**
The CUFE co-chairs will write a short feature for the next ACOTUP newsletter focusing on outcomes of the retreat.

---

**References**

Appendix 1: Capacity Building

Objectives, strategies, expected outcomes, leads and timelines

<table>
<thead>
<tr>
<th>Objectives</th>
<th>Strategies</th>
<th>Expected outcomes</th>
<th>Leaders</th>
<th>Timelines</th>
</tr>
</thead>
<tbody>
<tr>
<td>(What will be CUFE’s focus over the next five years?)</td>
<td>(How will we achieve these objectives?)</td>
<td>(How to measure our success in achieving these objectives?)</td>
<td>(Who will lead us toward achieving these objectives?)</td>
<td>(What is a reasonable time frame to achieve these objectives, considering human and financial resources available and the political landscape?)</td>
</tr>
</tbody>
</table>

1) By December 2011, CUFE will develop a proposal to ACOTRO, CAOT and professional associations and colleges, which advocates that student education is a critical piece to ongoing professional development (PD) and competency maintenance (CM) thus ensuring safe, effective occupational therapy practice.

- Gather background information:
  - Other professional groups regulatory bodies.
  - Literature search on evidence of student education for PD and CM.
  - Use COTO data (26% of OTs in Ontario contribute to student education for at least 3 weeks a year)

- Develop chart of each province with number of OTs available and number of

Regulators make a written statement that OT student education is valued and contributes to the quality of client services, therefore to public safety.

CAOT, as well as provincial associations, will develop a position statement that support and value student education for the future of the profession and for professional development.

CUFE will suggest a target number of OT’s needed to educate OT students in each province.

Donna Drynan, ACCE from UBC, with her task force group will overview the pursuits of the different strategies, in order to meet expected outcomes.

The first draft of the proposal to ACOTRO will be developed by June 2011. It will be discussed at the Saskatoon meeting.

The first draft of the proposal to the CAOT and the different provincial associations will be developed by June 2011, for the Saskatoon meeting.

The first draft of the Ontario OT map will be available in the early fall of 2011.

Catherine Donnelly and Mary Lou Boudreau, Queens University, will
placements required in different fields to determine the percentage of OTs required to offer diversified quality educational experiences.

- Consult with the Ontario Council of University Programs in Rehabilitation Sciences (OCUPRS) for data, lobbying strategies to be efficient and targeted in our efforts.

begin by examining the fieldwork utilization patterns in Ontario as a model to then apply to the broader Canadian fieldwork map.. This will feed the target chart to be developed.

<table>
<thead>
<tr>
<th>Objectives</th>
<th>Strategies</th>
<th>Expected outcomes</th>
<th>Leaders</th>
<th>Timelines</th>
</tr>
</thead>
</table>
| 2) By December 31th, 2012, the NFPS will have evolved into a timely, efficient, fair and transparent service that meets the educational and capacity building goals developed by CUFE. This service will either be financially viable or permanently subsidized by Universities. | - Meet with Megram, current NFPS administrator, to continue improvements to the system.  
- Clarity with Megram what constitutes a financially viable service. | NFPS will reach 75% satisfaction rate among ACCEs.  
CUFE will get a clear picture of the operating costs to plan for long term financing of Service without increasing student fees. | Lorie Shimmell, McMaster U, and Susanne Mak, McGill, as part of the NFPS advisory committee, will overview the pursuits of the different strategies, in order to meet expected outcomes. | Set meeting with Megram and present results in June 2011 at the Saskatoon meeting.  
Present satisfaction survey results to CUFE in June 2012, at the Quebec city meeting  
Provide information at the June 2011 meeting in Saskatoon. |
- Clarify with Megram timeframe w/r to contract renewal.
- Develop options to the current service in case Megram does not continue services.
- Meet with ACOTUP council to discuss options.

CUFE will have time and resources to develop a plan B in case Megram does not provide services in 2013 and beyond.

Meet with ACOTUP council in the fall of 2011 and report to CUFE.

Provide draft of plan B at the June 2012 meeting in Quebec City. Select option to be implemented.

<table>
<thead>
<tr>
<th>Objectives</th>
<th>Strategies</th>
<th>Expected outcomes</th>
<th>Leaders</th>
<th>Timelines</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>- Meet with ACOTUP Council to discuss lobbying opportunities and resources (e.g. hiring lobbying consultants; partner with PT and SLP). - Request Chairs of programs (ACOTUP) to meet with Deans to advocate for support and participation in lobbying provincial government and employers, such as provincial hospital associations and regional health authorities to include student supervision in productivity rules and financing.</td>
<td>Provincial and territorial Governments will have included student education in productivity rules and will recognize student education in the job description occupational therapists. It will also financially support student education by compensating private practices within government contracts.</td>
<td>Caroline Storr, McGill U, and Margaret-Ann Campbell-Rempel, U of Manitoba, as CUFE co-chairs, will follow-up with ACOTUP Council.</td>
<td>Since this objective is quite complex politically, and should be played higher in the hierarchy, CUFE has not put a time frame as this is a longer term goal.</td>
</tr>
</tbody>
</table>

3) ACOTUP and Dean’s of University will Lobby government to include student education in productivity rules and will include financial
<table>
<thead>
<tr>
<th>Objectives</th>
<th>Strategies</th>
<th>Expected outcomes</th>
<th>Leaders</th>
<th>Timelines</th>
</tr>
</thead>
<tbody>
<tr>
<td>4) By the end of 2011, develop a marketing plan for fieldwork education in Canada as fieldwork will be seen as an attractive professional development activity, a source compensation to private practices' contracts.</td>
<td>- Meet ACOTUP council to discuss resources. - Ad campaign: select audience and media (ex: CAOT’s OT Now; Conference booth). ACOTUP to hire</td>
<td>Implementation of marketing plan will increase visibility of Fieldwork Education and its value, importance and prestige, through advertisement of its benefits to the therapist, the student, the</td>
<td>Caroline Storr and Margaret-Ann Campbell-Rempel, as CUFE co-chairs, will meet with ACOTUP Council.</td>
<td>Spring 2011 and report to CUFE meeting in June 2011 in Saskatoon.</td>
</tr>
</tbody>
</table>

CUFE to provide ACOTUP and Deans with statistics and information on benefits of student education (see objective 1 for specific strategies re: OT mapping, background information).

- Consult with CAOT on the workload management project.

- CUFE or ACOTUP to consult with OCUPRS who is currently developing a lobbying strategy for the Ontario Government.

- Offer background information to support lobbying efforts based on evidence.

Use OCUPRS lobbying plan as pilot project. Learn from the Ontario project.

Donna Drynan, Catherine Donnelly and Mary Lou Boudreau with task forces (as per first objective).

Jutta Hinrichs, U of Alberta.

Jean-Pascal Beaudoin, Ottawa U, with Ontario OT programs, will scan Ontario project and report to CUFE.

Report at the June 2011 Saskatoon meeting.

As OCUPRS’ project unfolds.
a pride, and a contribution to the future of the profession and health care.

marketing consultant through Megram.

- Lobby for national and provincial OT associations to create fieldwork educator awards.

profession and the clients.

By 2015, 10% increase in the overall number of placements available in Canada, in targeted fields of practice and underused regions.

Donnelly and task force to assist marketing consultant

ACOTUP with Catherine Donnelly’s task force.

2013 CUFE meeting in Victoria.

Winter 2012. Report to Quebec City meeting in June 2012.

Appendix 2: Summary of questionnaire filled in by Academic programs prior to the CUFE retreat, on January 20-21th, 2011.

Brainstorming on challenges, solutions and outcomes (not yet screened nor prioritized)

<table>
<thead>
<tr>
<th>Challenges and roadblocks</th>
<th>Solutions and strategies</th>
<th>Outcomes and targets</th>
</tr>
</thead>
<tbody>
<tr>
<td>Challenges (U level)</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>External:</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Lack in the variety of placements offered: Mainly in MH, Peds, Community, private practice.</td>
<td>- Consider new ways of doing things: creativity to overcome roadblocks.</td>
<td>- Provide to ACOTUP national OT clinical education strategic plan for the June 2011 Saskatoon meeting.</td>
</tr>
<tr>
<td>- Troubled health care system: Economy / cutbacks, mergers, workplace overload, constant changes.</td>
<td>- Develop a national strategic plan that covers:</td>
<td></td>
</tr>
<tr>
<td>- Lack of commitments from</td>
<td>o Barriers to sharing sites: fears, regional concerns, changing healthcare issues.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>o Sharing strategies to provide tools to use on a</td>
<td></td>
</tr>
</tbody>
</table>
administrators and therapists (fieldwork education is not seen as being important; and seen as a burden rather than an opportunity).

- Placement configuration: More and more 2tx for 1 student.
- Site becoming picky in the pairing off process as they have an eye for recruitment of soon-to-be-grads for available employment: Inter-U access vs contracts in place.
- Increased legal and administrative considerations.

**Internal:**
- Some challenges vary depending on catchment: 100% of OTs on board not enough placements for some.
- Time consuming activities like out-of-catchment and international fieldwork planning.
- Lack of teaching skills of fieldwork educators impact daily basis.
  - Develop actions to be used with each type of stakeholders (OTs, students, decision-makers).
  - Develop strategy to engage other OT organizations in the solution process.
  - Develop a national plan
  - Develop quality outcome indicators.
  - Develop outcomes to a prioritized list of solutions

- Develop marketing strategies:
  - Develop a thorough approach to soliciting all possible OT sites: enhance partnership among universities. Pool resources.
  - Develop strategy to "market" group supervision.
  - Aggressively advertize the benefits of fieldwork and the professional responsibility to teach students, with the support and contribution from national and provincial OT organizations.

- X% of therapists offering more than 4 wks of supervision a year (or increase of Z% over current 33%).
- X% of students engaged in emerging fields.
- X% of placements offered is in MH.
- X% of placements offered in Peds.
- X% of placements offered in the community.
- X% of placements offered in private practice.
- X% of placements offered in rural or semi-urban areas
<table>
<thead>
<tr>
<th>Confidence to supervise students.</th>
<th>Target OTs:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Territorialism;</td>
<td>o Change culture from burden to opportunity to teach a student. Also a social and a professional responsibility.</td>
</tr>
<tr>
<td>Hot spots (e.g. Vvr; TO)</td>
<td>o Create a sense of belonging and engagement for OTs by involving them in other areas of University life, including enhancement of recognition programs (the “air miles” of OT).</td>
</tr>
<tr>
<td>Lack of admin staff to support fieldwork to focus on retention, recruitment and support to tx.</td>
<td>o Title: Offer “clinical faculty” or practice/fieldwork educator status.</td>
</tr>
<tr>
<td>Increased number of programs / students.</td>
<td>o Reach to on-site champions within OT ranks to be less dependent on managers.</td>
</tr>
<tr>
<td>Students with tight financial situation: Have to work, do not want to go too far away.</td>
<td>o Reinforce that all fields of practice provide a good learning experience.</td>
</tr>
<tr>
<td>Students who want to go home: Limited inter-U trades.</td>
<td>o Enhance or develop fieldwork I education committees</td>
</tr>
<tr>
<td>Complexity of CE: Culture, interest in teaching, politics, logistics…</td>
<td>o Increase site visits: Personal touches: luncheons</td>
</tr>
<tr>
<td>Distance with sites = less contacts to develop relationships and increase numbers.</td>
<td>o Increase communication tools e.g. newsletters.</td>
</tr>
<tr>
<td>Dealing with legal and ethical and safety issues when in a distance education fieldwork model.</td>
<td>o Open door for therapists to try new ways to teach or project building.</td>
</tr>
<tr>
<td><strong>Roadblocks (CUFE level)</strong></td>
<td>o Develop culture of co-learners where both tx and st learn together with and from each other.</td>
</tr>
<tr>
<td>Different needs = different priorities: will we be able to</td>
<td>o Advertize best practice</td>
</tr>
</tbody>
</table>

See targets above

- X$ funded to hire OTs to supervise role emerging placements.
- Government will finance private practices within contracts to support student supervision.
- National and provincial associations and colleges will develop policies to promote student supervision as an opportunity to contribute to the development of the profession and as a continuing education valid choice.
<table>
<thead>
<tr>
<th>Develop an updated common national strategy?</th>
<th>Guidelines to promote the role of preceptor.</th>
<th>Government will allow and incite site administrators to develop policies to support fieldwork and see it as an opportunity.</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Collaboration rather than competition: some discrepancies between national strategies and local OT programs.</td>
<td>- Target decision makers:</td>
<td></td>
</tr>
<tr>
<td>- NFPS is not as efficient as expected and is now probably a temporary solution to inter-U placement trades: High fees; Non OT personnel + frequent changes; Time consuming for some Receiving University; Stats not automatically available; Not sustainable.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Not enough sharing of teaching strategies and material for preceptors.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- University enrolment: A cap until we implement solutions that work to increase # of placements?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Discrepancies in the per diem offered between U.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Field requirements: ex: MH=11% of practice but is compulsory.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Affiliation</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>- Sites to commit to # placements ✔ (targets by OT or site; minimum # of wks per year)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>- ACOTRO recognized continuing education program for preceptors</td>
<td></td>
</tr>
<tr>
<td></td>
<td>- Seek to go toward a residency model for OT (like in medicine): in hospitals, residents are essential to the good functioning of the system</td>
<td></td>
</tr>
<tr>
<td></td>
<td>- Develop an interD approach (allied health) when lobbying to government: more impact.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>- Lobby to provincial colleges to include preceptorship into continuing education and quality assurance programs.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>- Lobby to governments to modify productivity policies for health care employers to support and include preceptorship in health professionals’ roles and required activities.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>- Lobby to government to support private practices to include student preceptorship and compensate financial losses by increasing financial provision in</td>
<td></td>
</tr>
<tr>
<td></td>
<td>- X% of new grads that will supervise students after 1 year.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>- X% of new grads that will supervise students after 2</td>
<td></td>
</tr>
</tbody>
</table>
agreements can be a challenge for out-of-catchment placements.

- CUFE not as much a part of ACOTUP anymore (not sitting at the table): threat to being able to meet if priority slips.

- Obtain official support for CUFE to get ACOTRO and CAOT on board as partners to increase CB.

<table>
<thead>
<tr>
<th>contracts.</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Lobby for funding to develop health/rehab Uclinics across Canada.</td>
</tr>
<tr>
<td>- Lobby funding agencies to obtain funding to hire OTs to provide supervision in role-emerging placement</td>
</tr>
<tr>
<td>- Lobby Faculty/Program administrators for increased fieldwork faculty in order to increase support to advocate for placements: be visible and lobby.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>years</th>
</tr>
</thead>
<tbody>
<tr>
<td>(or increase of Z% over current %)</td>
</tr>
</tbody>
</table>

- Target new grads:
  - Bring new grads on board ASAP after 1 year of practice.
  - Adopt a nation-wide fieldwork teaching course with follow up to increase volume.
  - Establish a “give to the next” culture where new grads are expected to offer one placement a year until they have given back. By then, hopefully, they will be hooked.

- Develop system to offer unused available placements to all according to targets or trends re: variety or quantity.
  - Explore use of HSPnet to share placement availability and to build

- Collaboration between Us to maximize all placements available in Canada. Equitable distribution; overview mechanism of enrolment increase.

- A new placement trade system is in place by December 1st 2012.
<table>
<thead>
<tr>
<th>National data on placement use and availability.</th>
</tr>
</thead>
<tbody>
<tr>
<td>- InterU partnership to develop rural placements in shared areas.</td>
</tr>
<tr>
<td>- Centralize information: statistics on programs; results of surveys; results of gap analysis in terms of unused areas.</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>Sharing of teaching tools/partnership:</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>Education Workshops</td>
</tr>
<tr>
<td>-----------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>o New model of preceptorship for private practice</td>
</tr>
<tr>
<td>o Level 3 students being mentored as preceptors for level 2 students</td>
</tr>
<tr>
<td>o Increase faculty members involvement with community projects</td>
</tr>
<tr>
<td>o Consider adopting a national fieldwork evaluation and tools to ease U transitions for preceptors</td>
</tr>
<tr>
<td>o Hire outreach developers</td>
</tr>
<tr>
<td>o Group teaching with faculty member</td>
</tr>
<tr>
<td>o Research experience count as fieldwork</td>
</tr>
<tr>
<td>o Admin experience count as fieldwork</td>
</tr>
</tbody>
</table>

- Revisit policies:
  
  o All students should have at least one out-of-catchment or rural or emerging experience and this should be advertised and be a requirement for admission in all U.

  o Introduction of COOP placement (paid) to access businesses.

  o Open up Northern Ontario to Canadian U.
<table>
<thead>
<tr>
<th>First</th>
<th>Last</th>
<th>Agency</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lisa</td>
<td>Avery</td>
<td>School of Audiology and Speech Sciences</td>
</tr>
<tr>
<td>Catherine</td>
<td>Backman</td>
<td>Department of OS&amp;OT</td>
</tr>
<tr>
<td>Karen</td>
<td>Barclay</td>
<td>VCHA - Richmond Hospital</td>
</tr>
<tr>
<td>Charlotte</td>
<td>Beck</td>
<td>Reference Librarian, UBC</td>
</tr>
<tr>
<td>Jeanette</td>
<td>Boily</td>
<td>VCHA - Residential Services</td>
</tr>
<tr>
<td>Heather</td>
<td>Burrett</td>
<td>PHC - St Pauls Hospital</td>
</tr>
<tr>
<td>Krista</td>
<td>Carwana</td>
<td>Access Community Therapist’s Ltd.</td>
</tr>
<tr>
<td>Jeffrey</td>
<td>Chan</td>
<td>FHA - Burnaby Hospital</td>
</tr>
<tr>
<td>Rehka</td>
<td>Chhatre</td>
<td>FHA - Royal Columbian Hospital</td>
</tr>
<tr>
<td>Mary</td>
<td>Clark</td>
<td>Department of OS&amp;OT</td>
</tr>
<tr>
<td>Kathy</td>
<td>Corbett</td>
<td>COTBC</td>
</tr>
<tr>
<td>Lori</td>
<td>Cyr</td>
<td>VCH - GF Strong; CAOT Board Member</td>
</tr>
<tr>
<td>Rajni</td>
<td>Dhiman</td>
<td>FHA Surrey</td>
</tr>
<tr>
<td>Leslie</td>
<td>Duran</td>
<td>VIHA - Home and Community Care</td>
</tr>
<tr>
<td>Patti</td>
<td>Erldendorf</td>
<td>VCHA - PPL VAN Acute &amp; CFA committee member</td>
</tr>
<tr>
<td>Susan</td>
<td>Garret</td>
<td>PHSA - BCCH</td>
</tr>
<tr>
<td>Jan</td>
<td>Gauthier</td>
<td>VCHA - Home and Community Care</td>
</tr>
<tr>
<td>Heather</td>
<td>Gillespie</td>
<td>VIHA</td>
</tr>
<tr>
<td>Jason</td>
<td>Gordon</td>
<td>Provincial Pediatric Therapy Coordinator</td>
</tr>
<tr>
<td>Tom</td>
<td>Grant</td>
<td></td>
</tr>
<tr>
<td>Teresa</td>
<td>Green</td>
<td>VCHA - VGH/UBCH</td>
</tr>
<tr>
<td>Risa</td>
<td>Greenwood</td>
<td>VIHA</td>
</tr>
<tr>
<td>Tal</td>
<td>Jarus</td>
<td>Department of OS&amp;OT</td>
</tr>
<tr>
<td>Carmen</td>
<td>Kimoto</td>
<td>Vancouver Community College</td>
</tr>
<tr>
<td>Deirdre</td>
<td>Lee</td>
<td>VCHA - VGH/UBCH</td>
</tr>
<tr>
<td>Michael</td>
<td>Lee</td>
<td>Department of OS&amp;OT</td>
</tr>
<tr>
<td>Sandy</td>
<td>Leznoff</td>
<td>PHC</td>
</tr>
<tr>
<td>Sonja</td>
<td>Magnuson</td>
<td>Sunny Hill</td>
</tr>
<tr>
<td>Lynda</td>
<td>McCloy</td>
<td>Clinical Professor</td>
</tr>
<tr>
<td>Debbie</td>
<td>Mills</td>
<td>VIHA - Home and Community Care</td>
</tr>
<tr>
<td>Andrew</td>
<td>Neale</td>
<td>VCHA - Mental Health</td>
</tr>
<tr>
<td>Jan</td>
<td>Quinn</td>
<td>The Centre for Child Development</td>
</tr>
<tr>
<td>Jackie</td>
<td>Riske-Allen</td>
<td>FHA - Langley Memorial Hospital</td>
</tr>
<tr>
<td>Cori</td>
<td>Schmitz</td>
<td>U of A OT Coordinator</td>
</tr>
<tr>
<td>Cara</td>
<td>Shorter</td>
<td>VCHA - Lions Gate Hospital</td>
</tr>
<tr>
<td>Sarah</td>
<td>Sinanan</td>
<td>VCHA - Mental Health</td>
</tr>
<tr>
<td>Les</td>
<td>Smith</td>
<td>NHA - CDC of Prince George &amp; District Association Director; BCSOT President</td>
</tr>
<tr>
<td>Corey</td>
<td>Stock</td>
<td>FHA - Royal Columbian Hospital</td>
</tr>
<tr>
<td>Carol</td>
<td>Talley</td>
<td>CBI Victoria</td>
</tr>
<tr>
<td>Kevin</td>
<td>Waldorf</td>
<td>VCHA</td>
</tr>
<tr>
<td>Nancy</td>
<td>Wellwood</td>
<td>VCHA; CFA committee member</td>
</tr>
<tr>
<td>Kathy</td>
<td>Williams</td>
<td>IHA - Kootenay Boundary Regional Hospital, Trail</td>
</tr>
</tbody>
</table>
The Fieldwork Journey

Current location, the journey and the final destination
Usually an Enjoyable Journey

- Student success
- Preceptor fulfillment (Neale, 2002)
- Recruitment/retention in the job market
Vision for FW in Canada (CGFEOT)

- Promote excellence
- Reflect contemporary practice and current state of health care in Canada
- Promotes quality & accountability
- Integrate academic learning
- Effective learning environments
The National Perspective
University Programs
# of students

- UBC- 50
- U of A- ~ 100
- U of Manitoba- 50
- U of T- 80
- UWO- 55
- Queen’s- 66
- McMaster- 60
- U de Ottawa- 36
- McGill- 75
- Laval- 90
- U de Sherbrooke - 48
- U de Montreal- 120
- Trois Riveries- ~35
- Dalhousie- 60
Importance of National Commitment to Education

Where Applicants Received Entry-level Education

Total Applications Received July 1-June 30

Year


Internationally Trained Applicants

Entry Level Education in Canada

Entry Level Education in BC
OT Registration Applications with COTBC July 1, 2009 - June 30, 2010

- University of British Columbia: 26%
- University of Alberta
- University of Manitoba
- University of Western Ontario
- University of Toronto
- Queens University
- University of Ottawa
- McMaster University
- University of Montreal
- McGill University
- Laval University
- Dalhousie University
- Internationally Trained Applicants
Number of Student Applications and Placements per University
Where Students Have Been Placed
(By University Catchment Area)

- Western: 20 (2010-2011), 23 (2009-2010)
- Queen's: 6 (2010-2011), 0 (2009-2010)
- Laval: 3 (2010-2011), 0 (2009-2010)
- Sherbrooke: 2 (2010-2011), 0 (2009-2010)
U of A Statistics

- Number of OT students attending U of A who listed a BC home address on their application form:
  - 26 – tentative admissions for 2011/12 Year 1 (Grad 2013)
  - 13 – current Year 1 students (Grad 2012)
  - 25 – current Year 2 students (Grad 2011)

- Number of BC placements that were arranged for

- U of A OT students (2010/11 academic year): 37
The BC Context
(and such a nice place to make a journey...)
Current Preparation for the Journey

- 5 block placements
- 2 of these are 4 days/week
- National levels standard (level 1, 2, 3)
- No $ to support students or preceptors
- CBFE-OT Evaluation tool
- Pass/fail
- 1 MH anytime in 5 placements
- 2 out of town (VIHA, IHA, NHA regions - or 1 out of town and 1 FHA)

- Students are prepared in class
- Educator workshops offered throughout the year
- Online resources – www.osot.ubc.ca
Some detour from the ‘norm’ includes:
• international placements
• role emerging placements
• IP placements/rural experiences
• placements off sequence due to unsuccessful completion or withdrawal
Road Blocks???

I say... NO!

~2000 OT’s in BC - Capacity exists we need commitment from Therapists to remember to pack an OT student along for the journey!
Today is about the destination - dream big and wide and think about the future roads you want the OT students to travel.
Group 3

CLINICAL INTERPERSONAL

TRAMPOLINE OF LEARNING

STUDENT EXPERIENCING

POP-IN

ACADEMIC

OFF x 27
MONTH
Group 5