

Evaluation Criteria for Faculty

School of Occupational Therapy

Revised and Amended:
August, December 2009

April 2010 to include Program Director's Criteria

July 2017, by Anne Birge James (with feedback from all OT faculty), to include faculty administrative duties, the pedagogical role of Academic Fieldwork, access to sabbaticals for clinical line faculty, and to separate criteria for the School of Physical Therapy from the School of Occupational Therapy

August 2019, by Jennifer Pitonyak, Yvonne Swinth, George Tomlin (with feedback from all OT faculty), to add the role of Doctoral Capstone Coordinator, establish experiential learning coordination as a valued teaching activity, and expand professional development criteria

University of Puget Sound
Tacoma, Washington

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Preamble to Faculty Evaluation Criteria for Occupational Therapy

The following evaluation criteria are written in accordance with the guidelines in the *Faculty Code*, the *Professional Standards Committee Faculty Evaluation Criteria and Procedures* and the requirements of the Accreditation Council for Occupational Therapy Education (ACOTE), which accredits all entry-level occupational therapy programs.

The field of occupational therapy is broad and complex, as such, the *2018 ACOTE Standards and Interpretive Guide* (2018, p. 1) emphasize that “the dynamic nature of contemporary health and human services delivery systems provides opportunities for the occupational therapist to possess the necessary knowledge and skills as a direct care provider, consultant, educator, manager, leader, researcher, and advocate for the profession and the consumer.” For occupational therapy faculty, the knowledge of and skills for these diverse roles in practice naturally flow forward in the transition from practice to academia, with occupational therapy faculty entering academia with at least several years of practice experience and more often, bringing decades of experience in practice to their new role as academic educator. Faculty may have extensive administrative experience as managers or supervisors, as well as experience instructing clients and students across a broad range of practice settings. This context is essential for reviewing and evaluating the file of an occupational therapy faculty person, and respecting the usual career trajectory of faculty in occupational therapy as different from more traditional undergraduate faculty paths.

Occupational therapy practitioners work in diverse settings such as hospitals, clinics, schools, and community organizations, and help people develop or regain the ability to participate in everyday activities, from basic tasks, such as feeding oneself and getting dressed, to complex activities needed for work or managing finances. These activities are collectively referred to as “occupations.” Occupational therapy practitioners work with people throughout the lifespan, from premature infants to the oldest old, who have widely varied impairments that interfere with their participation in occupations, including physical, cognitive, and emotional disabilities, or other challenges, such as poverty or refugee status. Occupational therapy practitioners are the only professionals who look at the relationships among the person, the environment, and the occupation to support health and well-being through everyday activities. Approaches to intervention are widely varied and rooted in research evidence that is continually evolving. In order to understand factors interfering with clients’ engagement in occupation and to develop intervention that targets underlying impairments or conditions, occupational therapists must have a strong foundation in a breadth of fields, including human anatomy and behavior, neuroscience, psychology, human development, and sociology. Additionally, occupational therapists must possess interpersonal skills that foster engagement in therapeutic relationships, and leadership skills that enable them to assume supervisory and administrative roles in practice settings.

In order to effectively prepare entry level occupational therapy practitioners, occupational therapy educators must stay current with practice and the most recent evidence informing the field. ACOTE standard A.2.3. (p. 8) requires that occupational therapy faculty have: “Documented expertise in their area(s) of teaching responsibility and knowledge of the content delivery method” and standard A.6.2. (p. 22) mandates that faculty professional development

plans must include “evidence of currency in the areas of teaching responsibilities.” Therefore, while professional growth may consist of traditional scholarly pursuits, such as research and dissemination through publications and presentations, professional development in the form of continuing education workshops, courses, or advance certifications; continued engagement in practice or consulting; and volunteer leadership with professional occupational therapy or other relevant organizations are all essential forms of professional growth.

Occupational therapy faculty typically begin teaching after becoming clinical experts through years of practice in the field. Unlike many faculty members, who begin their academic careers immediately following graduate school, occupational therapy faculty typically enter academia later in their careers with advanced skills gained through professional practice. As a result, occupational therapy faculty members usually enter academia with experience collaborating with other professionals (in and outside of occupational therapy), providing advanced occupational therapy services to clients, teaching students and staff in practice settings, and engaging in self-directed professional development. Occupational therapy faculty in tenure- and clinical-lines are required to have post-professional doctoral degrees, which are often obtained after several years of practice. Some may pursue post-professional clinical doctorates in occupational therapy, which are programs open only to licensed occupational therapists. Other occupational therapists pursue research doctorates (e.g., a PhD, ScD, or comparable degree). Since there are very few research doctorates in occupational therapy, practitioners often pursue doctoral degrees in a related field consistent with their expertise and research interests.

In 2020 the School of Occupational Therapy at the University of Puget Sound expanded from a MSOT program to also offer an entry-level clinical doctorate degree (OTD) in occupational therapy. The OTD is a graduate degree that prepares students to sit for the National Board for Certification in Occupational Therapy (NBCOT) examination and become licensed as an occupational therapy practitioner by state regulatory bodies. The School of Occupational Therapy also offers a Post-Professional Clinical Doctorate (DrOT) degree program, that is open to practicing occupational therapists with a Baccalaureate or Master degree who wish to pursue doctoral-level education. Entry-level occupational therapy programs must be accredited, so the School of Occupational Therapy programs, both MSOT and OTD, meet an extensive list of “educational essentials,” developed by ACOTE, that dictate much of the curricular content. While occupational therapy faculty have some autonomy in determining *how* to deliver content in entry-level programs, they have little flexibility in choosing that content. Post-professional programs are *not* currently accredited, however there are suggested guidelines, so faculty teaching in the DrOT curriculum have more flexibility in responding to student suggestions in course evaluations regarding content.

Procedures for the Evaluation Process for Faculty Members in the School of Occupational Therapy

Guiding Documents:

Faculty members under review or those who are participating in reviews are expected to consult the appropriate documents and become thoroughly familiar with information as follows:

Faculty Code:

- The university evaluation standards and criteria at different stages of the faculty member's career
- Timetable for faculty evaluation
- Faculty rights and responsibilities
- Appeal procedures

Professional Standards Committee Faculty Evaluation Criteria and Procedures:

- Deadlines for submitting complete file including colleague letters and summary of deliberations to Provost's office
- Elaboration of university evaluation standards
- Standards for colleague evaluation letters and timing of their submission
- Process and associated deadlines for inclusion of letters from colleagues outside the department
- Pattern and documentation of class visitation for the purpose of observing teaching
- General guidelines for elements to include in the file including specific requirements for student evaluations
- Timing of faculty evaluation meetings
- All full-time faculty members (non-visiting) are eligible to participate in the evaluation process. Eligible faculty members will participate in the evaluation of all members of the department except as noted below.

PARTICIPATION in an evaluation (except in cases of a stream-lined evaluation) implies thorough evaluation of the prepared evaluatee file, teaching observations, providing an independent evaluation letter and participating in the deliberation meeting.

- Observations of teaching will be conducted by all participating faculty unless concurrent teaching scheduling does not allow it. Usually each participant will have a minimum of two teaching observations.
- Faculty members on sabbatical are not expected to participate in any aspect of the evaluation process, although they may choose to do so.
- Unavoidable absences from the deliberation meeting may occur due to illness or other reasons (e.g., death of loved one, jury duty). When this occurs, the faculty member's individual letter will be submitted with the file, but the faculty member will not contribute to or vote within the deliberation meeting.
- The process for departmental faculty evaluation in the School of Occupational Therapy (except for stream-lined evaluation) shall include nine steps (as below):

- a. Student evaluations of the faculty member are collected for all courses taught by the faculty member in the two semesters preceding departmental evaluation, or in the case of evaluation for tenure, four semesters preceding the evaluation, in the manner specified by the Professional Standards Committee, the *Code*, and the university *Faculty Evaluation Criteria and Procedures*.

NOTE: As per the User Guide, "Because of concern that evaluation forms invite bias, head officers of faculty reviews, department colleagues, and the Faculty Advancement Committee should use them with awareness of potential limitations and in the context of multiple forms of evidence of teaching effectiveness."

- b. The evaluatee selects having an open or closed file, and prepares the file and provides it to colleagues for review within the timelines indicated in the *Code*.
- c. Faculty colleagues, including the program director, complete classroom observations over the appropriate number of semesters preceding the departmental evaluation as indicated by the *Code*.
- d. The Head Officer informs faculty participating in the evaluation as to the open or closed status of the file.
- e. Faculty colleagues review the evaluatee's file, and compile their findings in letters addressed to the Provost and the Faculty Advancement Committee, generally submitted through the program director. Letters must be completed before the deliberation meeting and handed to the head officer by the end of that meeting.
- f. Faculty of the School of OT meet to review the performance of the evaluatee. Deliberations must result in a recommendation: a positive or negative appraisal, approval or disapproval for promotion, approval or disapproval for tenure, as applies.
- g. Colleagues participating in the deliberation who wish to file an addendum to their evaluation letter do so within 48 hours of the completion of the meeting. Addenda are submitted to the Head Officer.
- h. The Head Officer of the evaluation summarizes the colleague letters (if the file is closed) and the discussions of faculty colleagues in written form. The deliberation letter circulates among faculty present at the deliberation meeting for feedback and approval.
- i. The Head Officer meets in person with the evaluatee to review the summary of colleagues' findings, consistent with requirements set forth in the *Faculty Code* and the *Faculty Evaluation Criteria and Procedures* document (Checklist for Head Officers). This meeting provides the evaluatee with the first opportunity to raise issues regarding the fairness of the evaluation process. Following the meeting and review of the file, the evaluatee has five (5) working days to file an informal challenge to the fairness of the evaluation process to the Head Officer or ten (10) working days to file a formal challenge to the Chairperson of the Professional Standards Committee. Evaluatees who wish to challenge the fairness of the evaluation process must follow the procedures as outlined in the *Faculty Code*.

Hereafter the entire documentation is forwarded to the Office of the Provost and the Faculty Advancement Committee for further review. Later, within four months of the report from the Faculty Advancement Committee (or in the case of a tenure decision, from the Board of Trustees), the Head Officer will meet with the evaluatee to discuss the outcome of the evaluation, in accordance with the *Faculty Code*.

Criteria for Faculty Evaluation

The Professional Development Plan

Each faculty member develops and maintains a professional development plan (hereafter referred to as “the plan”) that includes long-range goals and short-term objectives in the evaluated areas of teaching, professional growth, advising, and university and community service. Faculty may use the ACOTE Form F to record the plan in their files. Form F is required by ACOTE for documenting professional development goals and activities. ACOTE requires that Form F align with both the university and program strategic plan and is updated by each faculty member annually, in consultation with the Occupational Therapy Program Director¹ or designee. The plan takes into account the individual’s goals for professional development across all five evaluated areas, as well as developments within the profession and program, and curricular and university needs. Colleagues who participate in faculty evaluations must refer to the plan so they are clear about the expectations that have been agreed upon for the faculty member being evaluated. Faculty must demonstrate progress on the plan and from previous evaluations (where applicable) in order to receive a positive assessment.

Plans will be heavily impacted by the program’s strategic plan (an ACOTE requirement) as well as faculty roles. An understanding of the structure of the School of Occupational Therapy, including the variety of roles, is necessary so that evaluators throughout the process (school, Faculty Advancement Committee, and administration) are examining the faculty member’s file in the appropriate context. We have three distinct types of faculty lines: 1) tenure-line or tenured faculty, 2) non-tenure-line, clinical-line faculty, and 3) instructors. Further, given the varied administrative needs of the School of Occupational Therapy there are faculty in each of these lines who receive load for administrative teaching responsibilities and may instruct/coordinate courses that use methods other than traditional classroom teaching. The following section describes expected performance in each of the areas of evaluation.

Areas of Evaluation and Expected Performance

I. Teaching

The School of Occupational Therapy is committed to quality education for its students. Teaching performance expectations for tenure-line, clinical-line faculty, and instructors are the same. Curricular goals must address the goals of the University of Puget Sound, the needs of the profession, the accreditation requirements imposed by ACOTE, and requirements for professional licensure of graduates. Course objectives, content, assignments, and learning outcomes for students should reflect curricular goals.

¹ The roles of director of the School of Occupational Therapy, chair of the Department of Occupational Therapy, and director of the Master and Doctorate in Occupational Therapy Programs are fulfilled by the same faculty member. For accreditation purposes with ACOTE, the program director is the administrator responsible for oversight of faculty development plans (Form F).

Students in the School of Occupational Therapy, like those throughout the university, come with varied educational and life experiences, values, and learning styles. Faculty must acknowledge these differences and implement diverse teaching strategies to the extent that class size and content permit. Students enter programs in the School of Occupational Therapy as cohorts, so faculty must also attend to the needs of each class as a group, which can vary from year to year.

The faculty member must have an excellent grasp of the content taught, so as to convey accurate information, engender student enthusiasm for and confidence in the discipline, challenge students within the discipline while providing guidance to meet those challenges, and instill in students a value of lifelong learning for continued competence in practice. Additionally, course content must meet ACOTE standards and prepare students to pass the NBCOT certification exam and to become an entry level, generalist practitioner. As such, ACOTE requires that faculty have documented expertise in content taught. Therefore, a significant number of courses in the School of Occupational Therapy are “team taught” to best use faculty content expertise and to support faculty load demands. When faculty members who teach in one or more team taught courses are reviewed, they must clearly articulate their role within the course(s) and the content for which they were responsible. Colleagues participating in the evaluation process will consider the role and content when reviewing the file, including the student evaluations.

Course structure should be well organized, demonstrating alignment of student learning outcomes with content and assessment of student learning. Learning activities and “classroom” management should effectively convey information, strive to spark excitement in the students and establish a stimulating, supportive atmosphere. Instructional methodologies should promote student independence and encourage active learning. Assessments of student learning should be graded appropriately to support students’ successful development as effective practitioners. This includes addressing the student’s developing professional reasoning and judgment in a manner that is scaffolded and reflects their progression in the program. The faculty member should carefully evaluate student work and make appropriate distinctions between levels of achievement.

Faculty who meet expectations in teaching performance:

1. Demonstrate mastery of the field.
2. Convey enthusiasm for the discipline.
3. Exemplify a role model for the profession.
4. Promote student independence in learning and professional development.
5. Encourage students in lifelong attainment of knowledge and skills. One way that faculty members may assess their performance on this criterion is through consideration of student performance on the National Board for Certification in Occupational Therapy (NBCOT) licensure examination at the completion of their education. Preparation for Level II fieldwork may also be considered.
6. Communicate with other faculty members to ensure concurrent and sequential organization of content within the occupational therapy curriculum.
7. Use and publish course objectives appropriate to the purpose of the course and the curriculum design.
8. Establish clear and measurable course requirements.

9. Demonstrate excellent presentation and management in classroom and other teaching contexts.
10. Employ teaching methodologies appropriate to the content, goals, and format of the course and to the curricular goals.
11. Carefully evaluate student work and make appropriate distinctions between levels of achievement and student readiness to progress to the next level of the curriculum.
12. Provide feedback in a manner that supports student learning and scaffolding of assignments and curricular content.
13. Post office hours and demonstrate a willingness to accommodate varied student schedules.
14. Modify course content/methodology based upon faculty/student feedback and developments within the program or discipline. (*NOTE: When courses are team taught, or primary responsibility for a given course lies with another faculty member, modifications of course content and/or methodology must be carried out in close consultation with the lead instructor*)

Administrative Teaching Roles

Administrative teaching roles are intertwined with experiential learning in the School of Occupational Therapy. Coordination of experiential learning experiences, such as fieldwork and the doctoral capstone experience, is an essential pedagogical component of the School of Occupational Therapy curriculum, and required to meet ACOTE accreditation standards. Faculty with load for coordination of experiential learning employ constructivist approaches and similar teaching philosophies in which the instructor acts as a facilitator of learning rather than as the direct source of knowledge. Coordination of experiential learning also includes mentoring as a form of teaching, in that faculty mentor students regarding professional behaviors and continued professional development often beyond the scope of the academic advisor. Faculty in these roles also mentor and support adjunct clinical instructors in our clinics, as well as practitioners in the community who provide direct supervision for fieldwork and doctoral capstone experiences. Therefore, it is imperative that colleagues involved in all steps of the evaluation process understand that load for coordination of experiential learning experiences is a highly valued form of teaching, and should be considered on an equal plane to classroom teaching experiences when evaluating the faculty member. Faculty in the following administrative teaching roles must demonstrate the listed expectations for administration in addition to the teaching expectations described above.

Director and Associate Director. As in other university departments, one or more faculty members in tenure- or clinical-lines have administrative duties serving as Program Director and Associate Program Director.

The Director and/or Associate Director are responsible for, or delegate, the following activities, and ensure that completion is both timely and meets or exceeds the school's needs:

1. Manages the School of Occupational Therapy's strategic plan in collaboration with faculty, including creating, implementing, and updating.

2. Sets a positive and supportive tone and ethos of the working and learning community in the School of Occupational Therapy.
3. Completes accreditation and curriculum reviews, including overseeing the ACOTE re-accreditation process (annual data report, biennial update report, cyclical self-study and visit) and managing the university's curriculum review and re-accreditation reports.
4. Ensures delivery of the occupational therapy curriculum, including hiring of regular faculty (with colleagues and Deans), planning adjunct coverage including hiring and orientation, scheduling courses (with Director of PT and other relevant departments), managing the implementation of and changes to the curriculum, and ensuring quality control.
5. Oversees the administrative and educational pieces of the community-based and campus-based teaching clinics including ensuring HIPAA policies are followed, the implementation of the EMR (electronic medical records), hiring and supervision of clinic instructors, ordering of materials, hiring and supervision of student workers and pedagogical alignment with the classroom curricular content.
6. Oversees recruitment of qualified student applicants, including: supervision of the prospective student advisor; arranging attendance at graduate fairs when appropriate; communication with academic advisors at community colleges and four-year institutions about the discipline of occupational therapy and the program at Puget Sound; maintenance and revision of recruitment materials (web page, brochures and other mailings); and communication with prospective students.
7. Oversees admissions including: updating admissions forms and protocols; leading admissions decision-making process; communicating with applicants before and after acceptance decisions; and managing offers of financial aid via fellowships and scholarships to students.
8. Serves as advisor to admitted students prior to their arrival on campus at which time they are assigned to their regular faculty advisor.
9. Promotes alumni relations, including: communicating departmental updates via annual newsletter; facilitating connections among prospective students, current students and alumni; and providing clinical research information or sources to alumni who inquire.
10. Completes constructive faculty evaluations in a timely manner and supports faculty development, including: serving as head officer in tenure- and clinical-line faculty evaluations; evaluating visiting faculty annually; monitoring adjunct faculty student evaluations and intervening where needed; collaborating with colleagues on their own professional development goals; and mentoring faculty.
11. Plans and leads faculty meetings and retreats and attends campus chair meetings, distributing information to faculty and staff, as needed.
12. Supervises staff.
13. Manages the department budget, including: creating the annual budget; monitoring departmental accounts; composing reports and requests for renewal or funding changes.
14. Contributes to facility oversight when attention is needed, including safety, access, and security of the building and grounds.
15. Monitors developments in the profession of occupational therapy that impact education, accreditation standards, fieldwork, and students' transition into the profession (e.g., certification exam and licensing requirements) and communicates these data consistently to colleagues and students.

16. Measures program outcomes, including:
 - a. Communicates information on program outcomes (enrollments, local, state and national employment profiles) to the Dean of Graduate Studies, fieldwork supervisors and other practitioners.
 - b. Communicates with numerous parties throughout campus (such as the Dean of Students, Office of Academic Advising, etc.)
 - c. Supports interdepartmental collaboration between the School of Occupational Therapy and other departments to create and maintain a productive learning environment for students in the programs.
17. Responds to and implements emergency procedures and processes (such as addressing adjustments due to a pandemic)

Note: The amount of time spent on each of these areas will depend on the demands of the academic year. For example, for years in which program re-accreditation occurs, more time will be dedicated to managing the strategic plan and accreditation review.

Academic Fieldwork Coordinator (AFWC) and Associate Academic Fieldwork Coordinator (Associate AFWC). The *2018 ACOTE Standards and Interpretive Guide* (2018, p. 39) describe the significance of fieldwork education as a component of the occupational therapy curricula:

“Fieldwork education is a crucial part of professional preparation and is best integrated as a component of the curriculum design. The fieldwork experience is designed to promote clinical reasoning and reflective practice, transmit the values and beliefs that enable ethical practice, and develop professionalism and competence in career responsibilities. Fieldwork experiences should be implemented and evaluated for their effectiveness by the educational institution. The experience should provide the student with the opportunity to carry out professional responsibilities under the supervision of qualified personnel serving as a role model. The AFWC is responsible for the program’s compliance with fieldwork education requirements.”

In the School of Occupational Therapy, the AFWC is responsible for oversight of all administrative fieldwork responsibilities and delegation of administrative fieldwork responsibilities to the Associate AFWC. If the Associate AFWC is not available, then the AFWC is responsible for the completion of all tasks specific to the delivery of a successful fieldwork program. As defined by ACOTE and as stated above, fieldwork education is a crucial part of professional preparation and is best integrated as a component of the curriculum design. The AFWC is responsible for the program’s compliance with ACOTE’s fieldwork education requirements including orientation to fieldwork, student reflections on experiences, mentoring of students in collaboration with the on-site fieldwork educators, and training and mentoring of fieldwork educators. There may be situations in which the AFWC and Associate AFWC may engage in classroom teaching. When applicable, the evaluation of classroom teaching would be consistent with the requirements for teaching excellence of faculty, as outlined in the previous section on teaching.

When evaluating the file of the AFWC and Associate AFWC it is essential to consider the significance of their administrative responsibilities for program experiential learning required for accreditation. ACOTE requires entry-level occupational therapy students to complete six months of full time, supervised, fieldwork and all accredited programs are required to have a designated AFWC who is a licensed occupational therapist.

The AFWC/Associate AFWC are responsible for, or will delegate to staff, the following activities, and ensure that their completion is both timely and meets or exceeds the school's needs:

1. Finds and evaluates fieldwork placements.
2. Provides student orientation to fieldwork.
3. Serves as faculty advisor to students on fieldwork.
4. Builds and maintains a relationship with the clinical community that supports student fieldwork placements.
5. Communicates legislative, regulatory, legal and practice issues affecting occupational therapy clinical education to faculty and clinical educators.
6. Communicates as needed with other university offices (dean of graduate studies, registrar, student financial services, and the financial offices related to the budget), clinical sites, students, and clinical instructors in a timely manner.
7. Creates and maintains all required written agreements between the university and fieldwork sites, including oversight of all contractual arrangements.
8. Maintains appropriate records of student outcomes and student evaluation of the fieldwork sites, and other records, required by ACOTE Standards.
9. Supervises assigned administrative staff.
10. Ensures that the fieldwork program reflects the scope and sequence of the curriculum design for clear connection between didactic and fieldwork education.
11. Collaborates with fieldwork sites to establish site-specific learning objectives to align with curriculum design.
12. Ensures that all site-specific policies and regulations are compliant and communicated between the university, student, clinical instructors, and faculty, including, but not limited to, HIPAA and FERPA.

Doctoral Capstone Coordinator. “The doctoral capstone shall be an integral part of the program’s curriculum design. The goal of the doctoral capstone is to provide an in-depth exposure to one or more of the following: clinical practice skills, research skills, administration, leadership, program and policy development, advocacy, education, and theory development (ACOTE, 2018, p. 44).” Doctoral-level occupational therapy programs are required to have a faculty member in the role of Doctoral Capstone Coordinator (DCC). The DCC must be a full-time core faculty member and have documented release time from teaching sufficient for overseeing the capstone process.

Similar to the AFWC, the DCC position has both administrative and teaching responsibilities in experiential learning specific to this role that enable the School of Occupational Therapy to fulfill ACOTE mandates. ACOTE requires entry-level occupational therapy students to complete a 10-week doctoral experience as well as a capstone project related to that experience.

The DCC finds and evaluates capstone experiences, oversees contractual arrangements, tracks student progress towards completion of the capstone project, and instructs seminars that support student learning throughout the capstone project. Therefore, while “teaching,” for this position may *not* include a traditional course load, the DCC teaches in context primarily in the area of capstone project development and management. This requires this individual to have a strong understanding of the curriculum design as well as pedagogical awareness of what happens throughout the curriculum both so this information can be shared with capstone experience sites. Because the DCC may not teach in traditional classes, faculty in this role may not receive traditional teaching/course evaluations from students. As a result, our guidelines for evaluating teaching have been expanded to include coordination of doctoral capstone experiences and projects. Otherwise, criteria for excellence in teaching and clinical leadership/administration for the DCC include:

1. Builds and maintains a relationship with the clinical community that supports student capstone projects and experiences.
2. Communicates legislative, regulatory, legal and practice issues affecting occupational therapy clinical education to faculty and clinical educators.
3. Communicates as needed with other university offices (Dean of Graduate Studies, Registrar, Student Financial Services, and the financial offices related to the budget), clinical sites, students, and clinical instructors in a timely manner.
4. Creates and maintains all required written agreements between the university and capstone sites.
5. Maintains appropriate records of student outcomes and student evaluation of the capstone sites, and other records, required by ACOTE standards.
6. Supervises assigned administrative staff
7. Ensures that the capstone reflects the scope and sequence of the curriculum design, including individual specific objectives and plans for supervision.
8. Collaborates with faculty to develop student evaluation tools to support the in-depth knowledge, synthesis and application of individual capstone projects and experiences.

Clinic and Experiential Learning in Context (ELiC) Coordinators. In addition to traditional clinical level I fieldwork experiences in hospital, outpatient, or other medical settings, the School of Occupational Therapy offers additional experiential learning integrated throughout the curriculum, our mental health and campus-based “clinics” and our ELiC courses. Several faculty serve as coordinators for the mental health community-based clinic and the campus-based adult and pediatric teaching clinics, and faculty also receive load for coordination of the ELiC courses. These faculty develop and coordinate these important, experiential learning experiences which serve as required fieldwork level I experience required by ACOTE.

Faculty with clinic administrative load must demonstrate mastery of the field, and are responsible for, or will delegate to staff or student workers, the following activities, and ensure that their completion is timely, aligns with the pedagogical priorities of the school, and meets or exceeds the school’s needs:

1. Sets a positive and supportive tone and ethos for the clinics in the School of Occupational Therapy and the community.
2. Manages the general, and day-to-day, clinic operations such as:
 - a. Recruiting clinic clients
 - b. Scheduling
 - c. Ordering assessments and supplies
 - d. Maintaining assessments and supplies
 - e. Ensuring cleanliness and safety of equipment to meet OSHA standards
 - f. Supervision of clinical instructors, students, staff, and clinic aides
3. Ensures that HIPAA and FERPA requirements are followed by students, clinical instructors, and other clinic personnel as required by law.
4. Hires and trains clinical instructors in collaboration with the Program Director.
5. Completes constructive clinical instructor evaluations in a timely manner and supports clinical instructor training and development.
6. Recruits participants/clients for clinic experiences.
7. Establishes appropriate and timely strategies for addressing the needs of clients and students.
8. Ensures delivery of the student learning clinic curriculum, including coordination with the curriculum, managing the implementation of and changes to the clinic, interaction with community participants and ensuring quality control.
9. Establishes clear and measurable clinic outcomes to ensure adequate student knowledge acquisition prior to fieldwork II experiences.
10. Updates documentation forms and maintains the electronic medical records (EMR) system.
11. Educates students, clinical instructors and staff on the use of and compliance with the EMR system to ensure HIPAA compliance.
12. Develops and maintains ongoing relationships via communication and collaboration with service providers in the community to ensure positive student and client experiences.
13. Maintains appropriate records of student outcomes and student evaluation, required by ACOTE Standards.
14. Prepares an annual evaluation report of clinic activities.
15. Supervises staff supporting clinic activities.

Faculty with administrative load for ELiC course coordination must demonstrate mastery of the field, and are responsible for, or will delegate, the following activities, and ensure that their completion is timely, aligns with the pedagogical priorities of the school, and meets or exceeds the school's needs:

1. Designs and applies the pedagogical framework for ELiC courses, in consultation with occupational therapy faculty.
2. Builds and maintains relationships with the university and local community that support student ELiC experiences.
3. Orients students to the ELiC course expectations and requirements.
4. Meets individually with students, as needed, to advise about ELiC experiences and requirements.

5. Tracks student requirements for timely completion of the ELiC courses (OT652/653 for the MSOT students and embedded in the Professionalism series for the OTD students).
6. Serves as an ELiC experience supervisor and mentor, as needed, for students who propose an experience that does not have other mentorship.
7. Conducts roundtable sessions to foster reflection on the ELiC service experience.
8. Provides written feedback to students regarding submitted ELiC documentation (timesheets, reflection papers, supervisor evaluations, etc.).
9. Maintains communication with faculty advisors, the program director, and the Registrar in regards to student registration for ELiCs and completion of “in progress” coursework.

Prospective Student Advisor. A faculty member serves as prospective student advisor. Faculty with prospective student advising load are responsible for, or will delegate, the following activities, and ensure that their completion is timely, aligns with the pedagogical priorities of the school, and meets or exceeds the school’s needs:

1. Answers questions of prospective students through email or other technologies, phone and in-person contacts.
2. Coordinates information sessions, student visits, and student tours in collaboration with the occupational therapy staff.
3. Provides input to faculty regarding applicants during the admissions process.
4. Provides annual assessment of recruitment outcomes to the Dean of Graduate Studies.

II. Professional Growth

Given the applied nature of the discipline of occupational therapy, professional growth takes many forms. Faculty in the School of Occupational Therapy are committed to demonstrating professional growth through a combination of scholarly activities. These activities represent a range of possibilities, and no individual is expected to demonstrate activity in all of these areas. Further, scholarly activities of faculty in the School of Occupational Therapy align with the emerging paradigm of knowledge translation (KT), defined as, “the synthesis, exchange, and application of knowledge by relevant stakeholders to accelerate the benefits of global and local innovation in strengthening health systems and improving people’s health.” (World Health Organization [WHO], 2020). Knowledge derived from research and practice, in occupational therapy and broader health and social systems, must be applied to practice, policy, education, program development, and other situations, to help close the gap between “knowing” and “doing.”

As such, evaluation of the faculty member’s professional growth, both form and outcomes, should be based on its relevance to the faculty member’s plan for professional growth, and the strategic plan and scholarship agenda of the school (ACOTE standard, A.5.6.), and evaluation criteria outlined in the *Faculty Code*.

Work in the area of knowledge translation has demonstrated that a journal publication is not always the best way to impact thinking and practice in the field of occupational therapy. Thus, all professional growth activities are viewed as significant and each individual faculty member is

able to determine the configuration of activities in which they engage. However, the evaluatee should demonstrate an annual rhythm of professional growth that includes some scholarly work as outlined in the “Comparison Document of OT Faculty Lines.”

| | Tenure Line | Clinical Line |
|----------------------------|--|---|
| Professional Growth | Professional growth can take multiple forms including consultation, practice, continued or advanced study, scholarly activity, participation in professional organizations, and advocacy. While all forms are valued, tenure-line faculty are expected to be initiators in the area of scholarly activity. | Professional growth can take multiple forms including consultation, practice, continued or advanced study, scholarly activity, participation in professional organizations, and advocacy. While all forms are valued, clinical line faculty may initiate scholarly activity or work in collaboration with colleagues. |

The diverse forms of professional growth of occupational therapy faculty may include: advanced practice, consultation and program development, research, and scholarship of teaching and learning—among other possibilities. Consistent across forms of scholarly activity is the importance of grounding scholarship in theory and evidence, including feedback from patients/clients, and evaluating the translation of knowledge to practice, policy, education, program development, and other situations. We also acknowledge that outcomes of scholarly work may be disseminated in a variety of ways, such as inservices, presentations, creation of manuals, publications, and other forms. Publication may be through professional occupational therapy journals or through those of related fields. The clinical nature of health care creates a situation of dynamic change, and the vanguard of professional trends in practice are often presented at professional conferences prior to, or in lieu of, publication. Therefore, presentations to professionals (practitioners and scholars) at the regional, national or international levels are also highly valued. In addition to traditional publication and presentation of scholarly work, writing in the form of editorials, software development, audio-visual materials, book reviews, laboratory manuals, textbooks or chapters in textbooks is also highly valued as professional growth. Consistent with recent changes in the profession of occupational therapy, we also value publication of scholarly work in venues accessible to the general public, such as videos, magazines, newsletters, or patient education materials.

All activities are seen as equally weighted to meet evaluation criteria, as this reflects industry and accreditation standards. Given the varied nature of professional development, including scholarly work in the field of occupational therapy, the evaluatee should include in the file how their professional growth aligns with the ACOTE required School of OT Strategic Plan (through the evaluatees Professional Development Plan), if appropriate the ACOTE required School of OT Research Agenda and the evaluatees teaching and administrative assignments. Given different faculty teaching assignments, administrative roles and skills, some may have greater depth to their professional growth portfolio while others greater breadth. To help streamline workload, synergies across projects are encouraged (e.g., mentoring a student evidence project that helps

inform the faculty member's scholarly work). Additionally, the file should present a clear trajectory of professional growth.

Practice, Consultation, and Program Development

The cornerstone of occupational therapy is practice. Therefore, consultation, program development, and practice provide opportunities for professional growth as well as creating connections between the School of Occupational Therapy and the practice community. Engaging in practice is an effective way to advance knowledge of appropriate evaluation and intervention approaches for delivery of occupational therapy services, as well as to enhance skills in educating clients and therapeutic use of self.

Providing consultation to health care or education professionals, corporations, school systems, hospitals, community agencies, and other occupational therapy programs also maintains intellectual vitality, contributes to the larger purposes of scholarship, and positively represents the university as a place of learning. Examples of consultation include providing work site assessments, evaluating clinical or educational programs, serving as a clinical research mentor, and other brief or ongoing consultation roles.

Faculty also demonstrate professional growth through participation in program development. This may consist of developing curricula for educational programs on campus, at other institutions, or in the community, or may involve implementation of new programs in diverse practice settings.

Continued or Advanced Study

Occupational therapy faculty members are expected to be lifelong learners. According to Washington state law (WAC 246-847-065), occupational therapists must demonstrate continuing competency by substantiating their engagement in continuing education. Continuing education may take many forms. Examples include expansion of knowledge and skills through participation in workshops, courses, or apprenticeship with master practitioners (clinicians, educators, or researchers) and specialty or board certifications.

Participation in Professional Organizations & Advocacy

Our professional organizations have the power to regulate educational requirements for occupational therapy and standards of practice, as well as exerting a strong influence on the legislation of health and educational policies. Activity in professional organizations such as the American Occupational Therapy Association (AOTA), the Washington Occupational Therapy Association (WOTA), the National Board for Certification in Occupational Therapy (NBCOT), the Rehabilitation Engineering Society of North American (RESNA), and others are avenues for professional growth. Through leadership in these organizations, faculty can impact the continued development of the profession of occupational therapy and the priorities and regulations that impact occupational therapy education and practice.

Advocacy for the profession of occupational therapy and the people it serves is also valued as professional growth. Advocacy can take place through professional organizations, such as those noted above, through work with organizations for specific populations (e.g., disability support

groups, service organizations such as HeadStrong and Outdoors for All) or through interprofessional education and collaboration.

Research and Scholarship of Teaching

Faculty in the School of Occupational Therapy may also engage in research and/or scholarship of teaching. Research may employ quantitative, qualitative, or mixed methods and investigate a range of questions from understanding client experiences to the effectiveness of specific interventions. Scholarship of teaching may also take various forms, such as the integration of new, evidence-informed teaching methods into existing courses or curriculum with systematic evaluation of student learning outcomes in response to the innovation, or curriculum mapping projects that seek to evaluate the integrative design of courses or curriculum. Research and scholarship of teaching may be performed individually or in collaboration with other scholars in the school, university, or at other institutions.

It is expected that scholarly work is disseminated via a presentation, publication and/or some other format (e.g., blog, webinar, etc...). Tenure line faculty are expected to be initiators of scholarly work whether the work is independent or in collaboration with others. Clinical line faculty do not need to be the primary initiator or lead in their scholarly work endeavors. The evaluatee should present clear evidence in the file regarding the impact and dissemination of their work and, if it was a collaborative project, specify their contribution to the project. Evaluatees going up for promotion or tenure should ensure that they are meeting the standards as defined in the faculty code.

III. Advising

Advising responsibilities in the School of Occupational Therapy begin in the second year of a full-time faculty position and are varied, depending on roles, as follows:

- Both tenure- and clinical-line faculty are assigned a proportionate number of students in the program.
 - Advisors must make themselves available to students at reasonable times, welcome students' questions and concerns, make appropriate referrals, and monitor student portfolios and professional development.
- Some faculty will serve as advisors to DrOT students.
 - DrOT student advisors (who are also the students' thesis chairs) mentor students' development of an individual plan of study that guides decisions in developing course assignments, experiential learning requirements, and thesis research.

All faculty in the above roles advising graduate occupational therapy students need a clear understanding of university and School of Occupational Therapy policies relative to graduate students, a clear understanding of the appropriate curriculum, and an understanding of university resources available to graduate students. Because occupational therapy students are working toward assumption of a specific professional role, advisors must understand the complexities of advising individuals regarding their ultimate integration into practice, and demonstrate skill in mentoring that process.

Further, some faculty members serve as undergraduate advisors for students who are exploring graduate work in occupational therapy or another healthcare field and are enrolled in the related first-year advising section. These undergraduate advisors need a good understanding of undergraduate policies and university services available to undergraduates, plus good familiarity with the structure of various majors and courses of academic study throughout the undergraduate institution. In addition, these advisors need to be well versed in occupational therapy admissions policies (both specific to Puget Sound and in general in the broader range of potential professional education programs) and in the process of proper guidance for individuals who hope to successfully gain admission to an occupational therapy program. When admission to an occupational therapy program is no longer a student's goal, it is necessary for these advisors to be able to assist in the exploration of acceptable alternatives and in the process of transitioning to an alternative course of study.

IV. University Service

Faculty members in the School of Occupational Therapy are expected to take part in some form of university service, departmental and university governance, co-curricular activities, activities that contribute to a stimulating educational atmosphere, and/or activities that convey the nature and purpose of the university to people outside of the university. In addition, faculty may serve the university through their work in student recruitment.

All faculty are expected to participate in departmental governance and activities that support the following:

- Reviewing and revising the curricula of programs offered by the School of Occupational Therapy.
- Participating in a collaborative approach to assessing students' professional behaviors and development.
- Carrying out necessary departmental tasks (e.g., serving as petitions chair, updating admission essay questions and rating criteria, being faculty advisor for the Student OT Association, organizing/running student orientation, etc.).
- Participating in reviewing applications and making application decisions.
- Participating in faculty evaluations.

Tenure- and clinical-line faculty members are expected to also serve at the university level. The AFWC/Associate AFWC and DCC are required to serve at the departmental level; therefore, service at the university level should be recognized for exceeding the expectations of the position. University service includes:

- Volunteering and fulfilling committee work, as assigned by the Administration.
- Running for and serving on elected committee work, such as the Faculty Senate, Faculty Advancement Committee, and others.
- Volunteering for other committees or work that supports the university, such as the Race & Pedagogy Institute initiatives.
- Successfully nominating individuals for awards, such as Alumni Service Awards, Honorary Degrees, and the Register Lecture.

V. Community Service

According to the *Faculty Evaluation Criteria and Procedures*, “consideration should be given to service outside the university that is related to professional interest and expertise and which enhances a person’s value to the university, or enriches teaching” (p. 7). For the purpose of occupational therapy faculty members, “professional interest and expertise” is broadly defined as any activity that allows the faculty member to enhance (by modeling) the students’ appreciation of the realization of the benefits of a broad and fully developed liberal arts undergraduate education in the midst of professional education and entry into a human service profession.