

Fieldwork Success Plans – Part I



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Collaboration is Key

- **Responsibilities for OT Program and Site**
 - Academic Fieldwork Coordinator (AFWC) should collaborate to develop site-specific learning objectives
 - Ensure the fieldwork program has qualified personnel to serve as fieldwork educators
 - Communicate about progress and performance during the placement

Objectives

- Understand responsibilities of Academic Program and Fieldwork Site
- Define purpose of Level II Fieldwork
- Identify problems leading to student difficulty during Level II Fieldwork
- Understand tools of a successful fieldwork experience
 - 8 Week Schedule (OTAS)/12 Week Schedule (OTS)
 - Site-Specific Learning Objectives
 - Midterm Fieldwork Performance Evaluation (FWPE)
 - Fieldwork Success Plan (Learning Contract)

Family Educational Rights and Privacy Act (FERPA)

- What is FERPA?
 - Federal law that protects the privacy of student education records (U.S. Department of Education, 2016)
 - Schools must have written permission from the eligible student in order to release any information from a student's education record (U.S. Department of Education, 2016)
 - FERPA impacts sharing of information

Collaboration is Key

- **Responsibilities of the Academic Program**
 - Provide fieldwork educators with information regarding specific didactic coursework and curriculum design
 - Provide fieldwork information on expectations and learning objectives
 - Ensure fieldwork site is equipped to meet curriculum goals
 - Ensure fieldwork site is equipped to provide educational experiences applicable to academic program

FERPA: What Can't We Share?

- Academic history
- Previous fieldwork performance
- Medical conditions
- Learning conditions

Level II Fieldwork

- **Purpose**
 - Develop competent, entry-level, generalist occupational therapists and occupational therapy assistants
 - Must include in-depth experience in delivering occupational therapy services to clients
 - Focus on application of purposeful and meaningful occupation, research, administration, and management
 - Exposure to variety of clients across life span and settings

Level II Fieldwork

- **AFWC/OT/OTA Program Responsibilities**
 - Ensure there will be no language barrier (verbal or written) between student, client population, fieldwork educator, AFWC
 - Ensure compliance with ACOTE standards
 - Ensure student and fieldwork educator understand formal student performance evaluation form and procedures for review

Level II Fieldwork

- **Fieldwork Educator Responsibilities**
 - Recommended that they be members of professional associations
 - Adhere to AOTA Code of Ethics
 - Have access to current professional resources
 - Structure opportunities for informal and formal reflection

Level II Fieldwork

- **Responsibilities of the Fieldwork Site**
 - Provide documentation of most recent review conducted by governing entity
 - Ensure fieldwork educators and students understand and comply with:
 - AOTA Code of Ethics
 - Applicable practice guidelines
 - Reimbursement standards for federal, state and local agencies, and third party reimbursement

Level II Fieldwork

- **AFWC/OT/OTA Program Responsibilities**
 - Recruit fieldwork educators who have adequate professional qualifications
 - Provide materials for fieldwork educators to support their development of supervisory skills
 - Ensure students are advised of prerequisites

Level II Fieldwork

- **Responsibilities of the Fieldwork Site**
 - May not expand services offered through placement of fieldwork students
 - Provide adequate physical space for client-related services
 - Maintain complete client and administrative documentation
 - Provide in-service education for its staff
 - Support research activities
 - Comply with all HIPAA regulations

The strong student is easy ...

***What do we do with a
challenging student?***

Fieldwork Program Tools

- **Define Expectations**
 - 8 Week Schedule (OTAS)/12 Week Schedule (OTS)
 - Site-Specific Learning Objectives
- **Assess Performance**
 - Fieldwork Performance Evaluation (WFPE)



Small Group Activity

***Let's First Identify
Student Challenges ...***

Level II Fieldwork

- **Weekly Schedule**
 - Defines the student's responsibilities
 - Overall expectations
 - Productivity expectations
 - Assignments
 - Setting/unit specific
 - See sample

Facilitating Student Success

- Understanding our respective roles
- Ensure Fieldwork Program tools are in place
- Communicate and collaborate with AFWC

Level II Fieldwork – Overall Expectations

- Become an active part of the treatment team.
- Achieve entry level competency in documentation: initial and re-evaluations, SOAP notes, discharge notes, ADL evaluations, standardized and functional outcome measures established by fieldwork supervisor; caregiver education/interventions.
- Implement evidenced-based practice.
- Develop strong basic repertoire of activities for use in treatment.
- Recognize how theoretical frameworks are applied in treatment.
- Identify attributes of self as a therapist.
- Give a formal presentation according to established criteria.

Level II Fieldwork – Overall Expectations

- Participate actively in supervision process.
- Develop skills to identify clients' need for OT evaluation and skilled intervention services.
- Develop skills in administering evaluations and reviewing results with Fieldwork Educator.
- Be responsible for case management of 120 units of direct patient care.
- Complete all assignments on-time and in a professional manner, using APA references and terminology from the *Occupational Therapy Practice Framework: Domain and Practice*
- Refer to AOTA Fieldwork Evaluation form and Site-Specific Behavioral Objectives.

Considerations for Site-Specific Learning Objectives

- How can you measure/evaluate that the student is progressing at midterm and entry-level at final?
 - Who is the student? OTAS or OTS?
 - What is the practice setting?
 - Level of independence?
 - Frequency of performance?
 - Quality of performance?

Weekly Schedule

See Sample

Site-Specific Examples

- **FWPE (OTS) Item #16**
 - Establishes an accurate and appropriate plan based on evaluation results, integrating multiple factors such as client's priorities, context(s), theories & evidence-based practice
 - **School setting:** Provides behavior-based measurable occupational therapy goals during the IEP meeting that reflect the student's needs and priorities
 - **Acute care hospital setting:** Develops within 24 hours after evaluation an intervention plan that is achievable within client's length of stay

Site-Specific Learning Objectives

- Best Practice
- Allows for objective scoring of items on the FWPE
 - Descriptors correspond to each criteria on the FWPE
 - Specific to site/unit
- AOTA strongly encourages and expects fieldwork sites to develop in collaboration with academic programs
- *See sample*

Site-Specific Examples

- **FWPE/OTAS Item #8**
 - Establishes service competency in assessment methods, including but not limited to interviews, observations, assessment tools, and chart reviews within the context of the service delivery setting
 - **Mental health setting:** Accurately administers the Allen Cognitive Level Screen and the structured intake interview after establishment of service competency
 - **Rehab setting:** Accurately completes the ADL/mobility assessments using the FIM® scale after establishment of service competency

Use the RUMBA Test

- R = Is the objective relevant to the practice setting, and is it an essential entry-level skill for the practice setting?
- U = Is the objective understandable to the student?
- M = Is the objective measurable? Can the performance be measured?
- B = Is the objective behavioral? Can the objective be seen?
- A = Is the objective achievable within the desired time frame?

Fieldwork Performance Evaluation (FWPE)

Areas Assessed	Rating Scale
☞ Fundamentals of Practice	• 4 – Exceeds expectations
☞ Basic Tenets of Occupational Therapy	• 3 – Meets standards
☞ Evaluation and Screening	• 2 – Needs improvement
☞ Intervention	• 1 – Unsatisfactory
☞ Management of OT Services	(AOTA, 2014)
☞ Communication	
☞ Professional Behaviors	

Give It A Try ...

- **FWPE OTS Item #2**
 - Adheres consistently to safety regulations. Anticipates potentially hazardous situations & takes steps to prevent accidents for clients & staff members throughout fieldwork related activities.

Fieldwork Performance Evaluation (FWPE)

- Completed at midterm (*and final*)
 - Use Site-Specific Learning Objectives
- Submitted copy completed by fieldwork educator
- Student should do a self-appraisal at midterm (*and final*)
- Midterm Score (OTS)
 - Satisfactory Performance = 90 and above
 - Unsatisfactory Performance = 89 and below
- Midterm Score (OTAS)
 - Satisfactory Performance = 54 and above
 - Unsatisfactory Performance = 53 and below

(AOTA, 2014)

Resources Are Available

- Academic Fieldwork Coordinator
- Philadelphia Region Fieldwork Consortium Website www.philaotfwconsortium.org
- AOTA Website www.aota.org

Unsatisfactory Performance ... What Do I Do Now?

- Contact the AFWC
- Request a site visit
- Collaborate with the AFWC to determine need and parameters of Fieldwork Success Plan

Questions



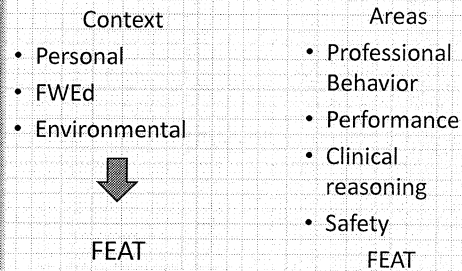
Learning objectives

- 1 • Recognize when FW success plans are needed
- 2 • Learn how to create a FW success plan
- 3 • Develop skills to implement a FW success plan

References

- American Occupational Therapy Association. (2015). *2011 Accreditation Council for Occupational Therapy Education (ACOTE®) standards and interpretive guide*. Retrieved from <http://www.aota.org/education-careers/accreditation/standardsreview.aspx>.
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- United States Department of Education. (2016). *Family Educational Rights and Privacy Act (FERPA)*. Retrieved from <http://www2.ed.gov/policy/gen/guid/fpco/ferpa/index.html>.

Why do student have trouble



PHILA. REGION FIELDWORK CONSORTIUM 22ND ANNUAL CLINICAL COUNCIL DAY FIELDWORK SUCCESS PLANS

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Fieldwork Experience Assessment Tool (AOTA)

"The purpose of the FEAT is to contribute to student and fieldwork educator discussions, so that reflection and problem solving can occur to enhance the fieldwork experience. The tool is designed to both assess the balance of the three key components, and to facilitate discussion about student and fieldwork educator behaviors and attitudes, and environmental resources and challenges. By mutually identifying issues present during fieldwork, the fieldwork educator and student can use the FEAT as a tool to promote dialogue, and foster the identification of strategies to facilitate the just-right challenge. The FEAT may be used early in fieldwork as a tool to promote dialogue, or at anytime throughout fieldwork as the need for problem solving emerges."

<http://www.aota.org/-/media/Corporate/Files/EducationCareers/Accredit/FEATCHARTMidterm.pdf>

A springboard for discussion

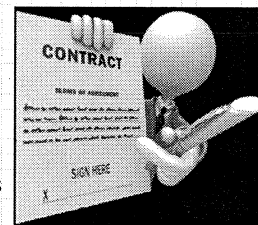
- A. Assessment
 - Environment
 - FWEd
 - Student
- B. Discussion
 - Commonalities and differences
 - Patterns
 - Strategies



<http://www.dreamstime.com/stock-illustration-cartoon-businessman-jumping-springboard-illustration-progress-concept-image1344543>

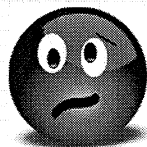
When/why do you need one?

- Student not meeting learning expectations
 - Safety
 - Performance
 - Professional behavior
- Building a case for failure vs. develop remediation processes
- Student's right to due process



Degree of Concern

- Can occur any time
- Mild, moderate, severe (at risk for failing)
- Evidence
 - FWPE
 - Weekly feedback forms
- Response
 - Mild – meet with student; discussion
 - Moderate – connect with AFWC
 - Severe – learning contract



Assumptions

- Faculty and students treat each other with respect
- The learning environment is positive and supportive
- Clinical learning objectives are clearly understood by the faculty and the student
- Evaluation judgment is based on multiple sources of evidence
- Feedback has been timely and relevant to the clinical learning objectives
- The clinical evaluation process is fair, just, and equitable (due process)

(Gallant et al, 2006)

What is a FW Success Plan?

- “... a written agreement between teacher and student wish makes explicit what a learner will do to achieve specific learning outcomes.” (Gallant et al, 2006)
- Situated in adult learning theory
 - Learners assume responsibility for the direction and focus of their learning (Knowles et al, 2005)

Students are entitled to due process (Scanlan et al, 2001)

- Fairness
 - Examine evidence
 - Apply criteria/standards
 - Clarify criteria/standard
 - Document decisions
- Duties
 - Faculty
 - Adequate preparation of students
 - Fair assessment
 - Maintain documentation
 - Ensure safe care
 - Convey info to students
 - Students
 - Provide safe care
 - Prepare for practice
 - Know personal limitations
- Equity
 - Consistent application of procedures
 - Alteration of process when justified
- Rights
 - Faculty
 - Evaluate students
 - Determine grades
 - Remove from FW when warranted
 - Question professional suitability
 - Students
 - Receive timely feedback
 - Receive and review supporting evidence
 - Receive timely notice of decisions
 - Challenge negative data or witnesses
 - Be assisted by person of their choice
 - Include objections in permanent record

Components

(Costa, 2015)

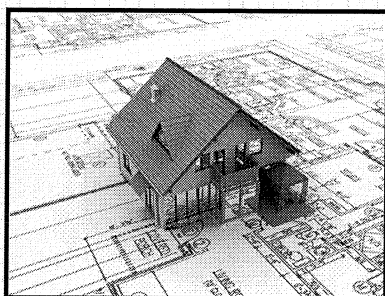
Exhibit 66.1 Steps to Creating the Learning Contract	
Outcomes	Identify the learning outcome in specific terms (e.g., student will complete initial evaluation report).
Measurement	Be specific about the details of each learning activity (e.g., The initial evaluation report will be completed within 24 hours of seeing a patient and with no more than 2 errors).
Resources	List the available resources the student could use in meeting each learning objective (e.g., Reading other initial evaluation reports, Talking with other therapists or students).
Process, Procedures, and Strategies	List the steps the student will take to meet the learning objective, such as: <ul style="list-style-type: none"> • Become familiar with evaluation form by reviewing it and identifying source of information for each section. • Read initial evaluation documentation completed by other therapists. • Observe other therapists conducting evaluations and read their documentation. • Find a specific evaluation form for completing documentation.
Evidence of Learning	Specify what proof will be used to demonstrate that the student has achieved this learning objective (e.g., Initial evaluation report submitted to fieldwork educator within 24 hours of seeing the patient).
Target Date	Identify the date by which the learning objective must be met. There are short-term goals and so the target parameters are just a few days.
Initials	Have all parties involved (i.e., student, fieldwork educator, academic fieldwork coordinator) sign the learning contract and all receive copies of it.

..... And consequences

Process

- Evaluate (collect and evaluate evidence)
- Identify student is at risk for failure
- Discuss concerns with student
- Identify learning needs
- Establish plan(strategies and resources)
- Set measurable goals and criteria for assessment
- Implement success plan
- Re-assess (collect and evaluate evidence)
 - Outcomes achieved
 - Outcomes not achieved

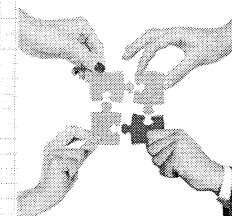
"Blueprint for success"



https://micotvandenbergh.files.wordpress.com/2011/07/realistic_blueprints_1600x1200.jpg

FW Success Plans are Collaboratively Developed

- Consistent with adult learning theory
- Increases student's responsibility for own learning



Features

- Objective
- Transparent
- Methodical
- Collaboratively developed
- Student-centered, individualized
- Respect student's right to due process


MODEL OF ADULT LEARNING

Malcom Knowles (1984)

	PEDAGOGY	ANDRAGOGY
Need to Know	Learn what the teacher wants them to learn.	Need to know why they need to learn something.
Self-Concept	Perception of dependence on teacher.	Feels responsible for their own learning.
Role of experience	Teacher's experience is what counts.	Adult's learn from each others experience
Readiness to Learn	Must be ready when they must	Ready to learn when they feel the need to know
Orientation to Learning	Subject centered orientation	Life-centered, Task-centered orientation.
Motivation	Externally motivated	Primarily internally motivated with some external motivation

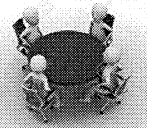
Procedure

- Recognize problem
 - Evaluate (collect and evaluate evidence)
 - Identify student is at risk for failure
- Provide feedback
- Contact AFWC
- Schedule meeting
- Establish FW Success Plan
- Review




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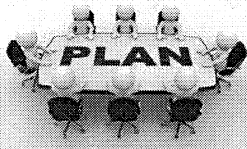
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Procedure

- Recognize problem
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- Schedule meeting
- Establish FW Success Plan
- Review
 - Re-assess (collect and evaluate evidence)
 - Outcomes achieved?
 - Outcomes not achieved?



Dissecting the Success Plan

Thomas Jefferson University
Student Learning Contract Template

Student name: _____ FW Site: _____ Date: _____
In attendance: _____

Areas in which the student is doing well: _____

Areas in which problems have been identified (relate these to site specific learning objectives): _____

Student behavior:

- Why is this behavior a problem (impact on patients, supervisor, facility, student learning)? _____
- Goal (what we want the new behavior to look like): _____
- How will the goal be measured? _____
- Identify strategies to achieve the goal:
 - what will student do? _____
 - what will supervisor do? _____

Failure to achieve these goals by ____ (date) ____ will result in failure of the fieldwork experience.

Signatures and dates: _____

A word about safety

- “Unsafe clinical practice is behavior that places the client or staff in either physical or emotional jeopardy. Physical jeopardy is the risk of causing physical harm. Emotional jeopardy means that the student creates an environment of anxiety or distress which puts the client or family at risk for emotional or psychological harm unsafe clinical practice is an occurrence, or pattern of behavior involving an unacceptable risk.”

(Scanlan et al, 2001)

Thomas Jefferson University
Student name: AB
FW Site: CD Hospital
Date: 3-17-16

In attendance: Student AB, FWEE, AFWE

Areas in which the student is doing well: AB is punctual, completes chart reviews well. 90% of the time (misses a few things, but mostly does well with this), and she is kind to her patients. AB takes constructive criticism well.

Areas in which problems have been identified (relate these to site specific learning objectives):

- 1. Communication
- 2. Treatment planning
- 3. Intervention

1. Student behavior: Poor communication skills. Safety is compromised when student does not clearly and succinctly communicate concerns to the patient. Based on this “why” communication style, she is not speaking clearly, loudly, using simple commands, or confidently addressing and approaching them during sessions. Although this concern has been brought to all 3 attenders at every supervisory meeting, there has been little to no change in her performance. At this time, AB gives appropriate communication roughly 50% of the time.

A. Why is this behavior a problem (impact on patients, supervisor, facility, student learning)? This creates an unsafe treatment environment, pt's do not understand what she wants them to do, pt's feel like a nervous, which limits their ability to be confident in AB as a practitioner.

B. Goal (what we want the new behavior to look like):

- Display confidence, not nervousness (facial expression, fidgeting) to patients, giving them confidence in her performance and information given.
- Communicate with adequate volume and clarity of instructions.
- Connect with clients on a personal level to establish trust and facilitate motivation.

C. How will the goal be measured?

- By 4/30/15, AB will
 - communicate with adequate volume 80% of the time with minimal verbal cues (25% or less)
 - provide clear instructions to patients 80% of the time with minimal verbal cues
 - demonstrate confident affect (not nervousness) 50% of the time (monthly at 20%) with minimal verbal cues
 - make personal connection with pt. on a personal level at least 3 times during each treatment level.

D. Identify strategies to achieve the goal

- what will student do?
 - To create (draw)
 - Self video tape
 - Develop an outline of the process to be used, then practice it. Record practice sessions to review and critique. Also, provide outline (big picture) of what will happen to patient prior to doing it. This can also be an opportunity to convey clinical reasoning to FWEE.
 - Review Taylor book on creating relationship, exercise “self-talk” to remind journal of why you need to communicate more effectively (e.g. “They NEED to hear my instructions”)
 - To receive feedback
- what will supervisor do?
 - Provide feedback using 3-10 scale
 - FWEE will audio tape a treatment session

A word about safety

- How many incidents constitute “unsafe practice”?
- Is one incident enough, or should there be a pattern?
- What type of incident is unsafe, compared to practice that constitutes failure

(Scanlan et al, 2001)

Goals to be met daily

	Monday	Tuesday	Wednesday	Thursday	Friday	FWEE Review
Verbally identify all lines/attachments to CI prior to beginning of session 100% of the time						
Verbally identify potential environmental barriers to CI at start of session 100% of the time						
Discuss with CI plan to keep lines organized during handling prior to handling patient 100% of the time						
Execute safe patient handling, incorporating plan for keeping lines organized throughout entire session 100% of the time						
Demonstrate proper body mechanics during all transfers/mobility 100% of the time						
Goals to be met at 50% of the time over the course of the week, starting 3/7/15						
Confidently explain role of occupational therapy to patients and families and standing close to patient 90% of the time						
Confidently provide patient and family education and allowing close to patient 100% of the time (meaning, goals of session, instructions, etc.)						
Identify patient deficits, based on the OSPA and evaluation findings 50% of the time						
Request CI treatment plans that include 3 possible upgrade/downgrade for every session 90% of the time						
Provide proper hand off communication to RN, PT, MD, SW 100% of the time with min verbal cues from CI including functional status, cognitive status, transfers, relevant medical changes, etc. plan						


A word about safety

- Goals often 100%
- “Must pass” items in FWPE




AFWC – Student Discussion

★ Confidence ★ Self-advocacy



Limitations

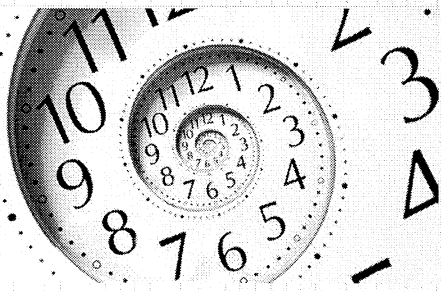
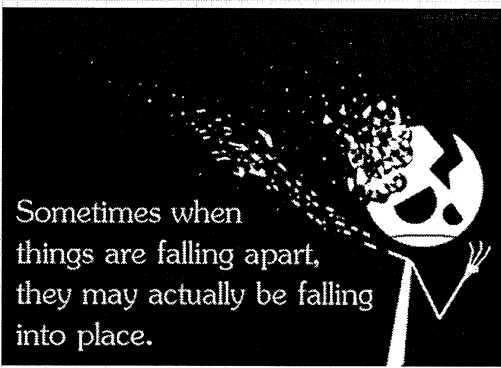
- Time consuming
- Possible negative student response
- Must be consistent with policies
 - W, WP, WF, F
 - Dismissal; repeat course
 - Tuition



http://embaasics.com/files/2011/12/hummary_falling_apart1.gif

(Gallant et al, 2006)

FW Success Plans/Learning Contracts are not retroactive

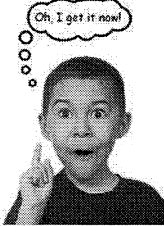



Sometimes when things are falling apart, they may actually be falling into place.

http://emilyquotes.com/wp-content/uploads/2014/12/EmilyQuotes.Com-falling-apart-inspirational-encouraging-positive-hope-unknown.jpg

Benefits

- Fills need for formal process
- Minimizes speculation, judgement and bias
- Timely support, increased contact
- Clarifies expectations, which fosters success
- Consistent with principles of adult learning
- Students appreciate support

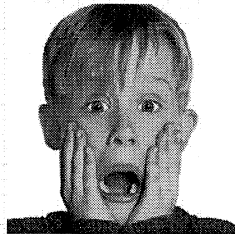


https://throughthevortex.files.wordpress.com/2013/11/aha-moment.jpg?w=500

(Gallant et al, 2006)

Terminating a FW Experience

Should not be a surprise to anyone

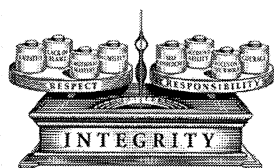


http://www.unboxedthoughts.com/wp-content/uploads/Home-Along.jpg

Ethical responsibility

"The supervisor must weigh concern for the student against the obligation to the profession."

(James and Musselman, 2005)



<http://www1.prweb.com/prfiles/2009/08/07/1353524/RevisedWoodcutScale.jpg>

Failing a student does not make you a failure!

Sometimes what we call "failure" is really just that necessary struggle called learning.

Preparation for terminating

- Documentation
- Timing
- Who will say the words
- Emotional preparation
- Ground rules
- Consequences
- Preserve student's dignity
- Obtain property of site
- Only the academic program can assign grade

Failure to Fail

- Inexperience, uncertainty,
- Second-guessing self, blame self
- Lack of training, administrative support
- Concern for student (personal, financial, etc)
- Inadequate documentation, feedback, timing
- Personal response (stress, emotions, fear of student response)

(Costa, 2015)

Follow-up by AFWC

- Student
- FWEd

"Fieldwork educators have often said that failing a student is the most difficult task encountered."

(Costa, 2015, p. 514)

Case Story

Emma is a 26 y.o. EMOT student. Her FW placement is in an acute care setting, a primary interest of hers. At midterm she received a 96 (90=satisfactory). During weeks 7-8, the FWEd (Sally) became concerned that Emma was still demonstrating inconsistent performance with transfers (forgetting to lock brakes and check on lines). In addition, Emma was below the expected caseload and did not feel ready to take on more patients. Lastly, Emma had become increasingly resistive to feedback.

References

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