August 27, 2015

TO: Graduate School Executive Committee

FROM: Diana Hess, Dean, School of Education

RE: Creation of Occupational Therapy Doctorate Program

The School of Education desires to create a Doctorate in Occupational Therapy to compliment our current Occupational Therapy program offerings through the Department of Kinesiology. The School of Education and Department of Kinesiology announce here the intent to plan this program and present an authorization proposal for the creation of the Doctor of Occupational Therapy. The new program, pending required approvals from various committees and agencies, would begin in the summer of 2016. The new program has been reviewed and approved by the School of Education’s Academic Planning Council on May 6, 2015. New courses are currently under development and/or in the process of receiving approval at the School level.

The Doctor of Occupational Therapy is designed to be a post-professional clinical doctorate that will prepare graduates for advanced level practice in occupational therapy. This program will fill a niche between current programs offered at UW-Madison as a degree for students seeking advanced leadership and practical training in the field. This will fill the gap between the MS-Occupational Therapy which prepares entry-level practitioners and the PhD in Kinesiology-Occupational Science track which prepares researchers and scholars.

The proposed Doctor of Occupational Therapy has been carefully designed to be sustainable and serve students needs including:

1. The program is designed to be a non-pooled, cost-recovery program.
2. The program is designed to work with students on a part-time, structured, cohort-based model allowing students a support system while maintaining life commitments outside of coursework.
3. The curriculum is designed to be delivered exclusively at distance allowing students from remote geographic locations to pursue advanced training. The program has made arrangements for two on-campus, face-to-face visits to include orientation activities and cohort bonding at the beginning and capstone project presentations and reviews at the end.
4. The program will prepare students for new roles as team leaders, project managers, administrators, advocates, teachers, or entrepreneurs through didactic learning and interprofessional practice experiences.
A Doctor of Occupational Therapy will allow students to rise into leadership positions within health care organizations where they will be able to better interpret and apply research and advocate for the needs of their clients and the profession. According to the Bureau of Labor Statistics, “employment of occupational therapists is expected to increase 29% from 2012 to 2022, much faster than the average for all occupations.” This increase requires that current practicing occupational therapy professionals be ready to step into new positions leading programs within health care while mentoring an influx of new occupational therapists in a changing health care field. This Doctor of Occupational Therapy can help and we look forward to serving this group of student professionals.

cc: Jocelyn Milner, APIR  
    Kelly Haslam, GFEC  
    Ruth Benedict, Occupational Therapy Program Faculty Director  
    Dorothy Edwards, Chair of Kinesiology  
    David Rosenthal, Associate Dean  
    Beth Janetski, Dean’s Office  
    Jeff Hamm, Associate Dean
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Authorization to Implement New Program Proposal  
Doctor of Occupational Therapy  
University of Wisconsin-Madison  

(7/31/15)

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Note for GFEC Members: Only Appendices F and I will be included in the paper-based mailed packets. All appendices are available via the electronic smart agenda.
A. ABSTRACT

The Doctor of Occupational Therapy Program (OTD) will be a non-pooled program with a part-time, structured, predominantly online curriculum serving student need for distance access and flexibility in acquiring advanced practice skills. The mission of the Program will be to train occupational therapists to become visionary leaders, engage in interprofessional education and practice, and facilitate research translation. The OTD will complement current departmental degrees; the MS-Occupational Therapy (MS-OT) and the PhD in Kinesiology-Occupational Science track. The former prepares students to become professional entry-level occupational therapists while the latter trains students in advanced scientific methodology and prepares them for careers as researchers and scholars. The OTD will fill a niche in between the current two programs as a degree for students seeking advanced leadership skills and applied training. The OTD will enable currently practicing therapists to acquire the knowledge and skills required for the transformation of our nations’ health and education systems as well as preparation to address the needs of an aging society.

B. PROGRAM IDENTIFICATION

1. Institution Name: University of Wisconsin-Madison
2. Title of Proposed Program: Doctor of Occupational Therapy
3. Degree/Major designation: Doctor of Occupational Therapy
4. Mode of delivery: Distance-delivered, On-line
5. Format of delivery: Part-time
6. Single institution or collaboration: Single institution
7. Projected enrollment over the first five years of the program:

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<td>18</td>
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<tr>
<td>Continuing students</td>
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<tr>
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<td>2</td>
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<td>0</td>
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<td>14</td>
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8. **Tuition structure:** Advanced practice OTD students will pay $1150 per credit with segregated fees waived under the campus non-pooled tuition mechanism.

9. **Departmental home/Functional equivalent:** Department of Kinesiology

10. **College or School:** School of Education

11. **Timeline for Implementation:**
   a. Submit Authorization to Implement Doctor of Occupational Therapy to UW-System and Board of Regents early Fall 2015
   b. First cohort of OTD students matriculate Summer 2016
   c. First cohort of OTD graduates in May 2019

**C. INTRODUCTION**

1. **Purpose and Mission**

   The proposed Doctor of Occupational Therapy (OTD) will serve the needs of occupational therapists who are seeking to advance in their careers. The program mission is to educate trained occupational therapists to become visionary leaders in inter-professional practice contexts through the translation and application of evidence.

2. **Fit with UW-Madison Strategic Plan**

   The UW-Madison Occupational Therapy Program (OT Program) programmatic efforts are aligned with the strategic plan of the Department of Kinesiology, the School of Education and the greater University. The OTD degree will strengthen our ability to advance the Wisconsin Idea in local and global healthcare arenas by leveraging interdisciplinary and financial resources, and increasing the leadership skills and diversity of practitioners in the state of Wisconsin and beyond. No other campus in the UW-System currently provides occupational therapy training at the clinical doctoral level. Among state public universities, UW-Madison trains the broadest array of interdisciplinary health professionals, a distinct advantage which we will leverage in training OTD students to be inter-professional leaders. Alliances established between our OT faculty, researchers and practitioners in a range of diverse fields including medicine, biomedical engineering, law and education will afford enrolled OTD students opportunities to engage in inter-professional collaborations to address urgent and complex problems related to individuals’ health, daily functioning and well-being. As occupational therapy practitioners, enrolled students will personify the best of the Wisconsin Idea by bringing current practice problems to the learning environment, working with peers and faculty to generate strategies and solutions, and applying newly acquired knowledge in their place of employment, through involvement in professional activities or the global community.
The UW-Madison OT Program is uniquely situated to successfully deliver an OTD degree for therapists in Wisconsin and beyond. Providing high quality education for over 70 years, UW-Madison has a history of training therapists, formerly at the bachelor’s and now at the master’s level, many of whom have the capacity and interest to enroll in an advanced OTD program. The UW-Madison MS-Occupational Therapy program is nationally ranked in the top 10% of entry-level Occupational Therapy Programs and our graduation and professional certification rates are exemplary with 100% of our graduates passing the national boards for the past three years.

3. Need for the Program

A market analysis (See Appendix A) using data gathered from the following sources substantiated the need for the program:

- **Prospective students**: The Bureau of Labor Statistics, the Department of Safety and Professional Services and the American Occupational Therapy Association provided information on the job outlook and number of prospective students based on the number of currently practicing therapists in Wisconsin and the nation.

- **Demand for advanced training**: Review of a 2010 EduVentures Survey of therapists in the Midwest region provided information regarding the demand for OTD training, therapists’ key characteristics, interest and motivations for enrolling in an OTD, and programmatic preferences.

- **Stakeholder interest**: Area employers of our OT Program alumni (N=12) were interviewed regarding the challenges and trends influencing the practice of occupational therapy, their interest in the proposed online OTD program, recommendations for the program curriculum, and needs for their employees’ continuing education.

- **Market competition**: Existing program websites provided information on the characteristics of online OTD programs in the Midwest region and nationally.

The market demand for occupational therapy practitioners and health service managers is projected to significantly increase in the next ten years. The Bureau of Labor Statistics reports that the “employment of occupational therapists is expected to increase 29% from 2012 to 2022, much faster than the average for all occupations.” The projection for the increase in available positions for Health Services Managers over this time period is 23%, a rate again exceeding the expected average of 14% increase in overall employment. Graduates of the OTD program will be qualified for positions as advanced master practitioners, health service managers, entrepreneurs, policy advisers, and faculty in teaching colleges and universities.

In the state of Wisconsin, there are currently 3,496 licensed occupational therapists, very few of whom hold a clinical doctorate. Nationally, there are over 100,000 employed occupational therapists with 48% having bachelor’s degrees and 47% having master’s degrees and less than 5% having an OTD (Workforce Survey, American Occupational Therapy Association, 2010). Institutes of higher education in the State of Wisconsin are producing approximately 150 new graduates with master’s degrees in occupational therapy per year. The preliminary market analysis by EduVentures suggests that 55% of surveyed therapists report an interest in enrolling
in an online OTD program in the future. The most frequently cited goals for pursuing an OTD were advancing clinical practice, seeking personal enrichment and enhancing career options (EduVentures, 2010).

Results of employer interviews indicate that one of the key challenges facing the profession is the need for additional training in health care reform, insurance mechanisms and the increased demand for documentation of evidence supporting practice. Local employers of occupational therapists agreed with the proposed program competencies and mentioned the importance of leadership, application of research and inter-professional skills. About half of the employers interviewed stated that they would encourage employees to enroll in an OTD program and a majority provides some financial support for continuing education.

Currently there are no other advanced practice OTD programs in the UW System. UW-Madison is well positioned to be the first public institution in the state to develop such a program with its doctoral-trained faculty, excellent technology support and access to an extensive campus network for inter-professional education. Only one university in the state, Concordia University Wisconsin, offers an advanced practice OTD degree. This private, religious-affiliated university offers an online OTD program with an emphasis on of one of three specialty tracks: education, hand and upper extremity rehabilitation, and pediatrics. The program being proposed at UW-Madison will differ significantly with its mission of training for visionary leadership, inter-professional education and practice, and research translation.

4. **Alignment with Emerging Knowledge and New Directions in the Profession**

Training occupational therapists at the clinical doctoral level is important given the advancing knowledge and the ever-changing landscape of the settings within which therapists work. The primary occupational therapy employment settings of health care and education are rapidly evolving as changes in social policy, new business models and the call for accountability influence daily practice. Increasingly, therapists must address emerging practice trends, examine and evaluate the level of current evidence to support use of interventions, alter their assessment and documentation practices in response to new reimbursement procedures, and develop leadership and advocacy skills in support of the needs of clients and the profession. The OTD degree will enable therapists to “re-tool”, advance their skills to state-of-the-art practice and acquire cutting-edge knowledge and skills to succeed in continually shifting and emerging practice environments. Trends such as our aging population, unsustainable increases in the cost of care, and recognizing lifestyle change as critical to health promotion are driving therapists to re-invent their practice. The Program’s emphasis on inter-professional collaboration and communication will prepare students for success in client advocacy, team leadership, and management among increasingly diverse professional groups.

Doctoral training will enable therapists to achieve excellence in the practical application of scientific inquiry and translational research. At UW-Madison, OTD students will learn the pragmatic benefits of data-driven practice decisions and will develop the necessary skills for applying research to their clinical reasoning. Emphasis will be placed on the critical examination of theories and practices in occupational therapy and related disciplines, thus encouraging the “continual and fearless sifting and winnowing” of knowledge associated with the UW-Madison and its values.
D. DESCRIPTION OF PROGRAM

1. General Structure

a. Fit with institutional program array and academic plan

The Occupational Therapy Program at the University of Wisconsin-Madison was established in 1943 under the joint direction of the School of Education and the Medical School. Initially students were admitted into a two year Occupational Therapy Program in their Junior year graduating with a BS. In 1974, the Occupational Therapy Program became part of a newly formed School of Allied Health Professions. In 1990 the School of Allied Health Professions was disbanded, and the Occupational Therapy Program was transferred along with Physical Therapy to the School of Education to form the Department of Therapeutic Science. In 1992, the Department of Therapeutic Science merged with the Department of Physical Education to form the Department of Kinesiology where the Occupational Therapy Program still resides.

In 2005, the MS in Occupational Therapy (MS-OT) degree was established as the entry-level professional program replacing the BS-OT degree. The MS-OT program accepts students with bachelor’s degrees from diverse fields who must meet prerequisite requirements. The 61-credit, 2.5 year course of study prepares students to sit for the National Board of Certification in Occupational Therapy (NBCOT) Exam. Upon successful completion of the exam, graduates become eligible for state licensure and practice. Licensed occupational therapists with a masters’ degree in OT or a related field or equivalent graduate credits will be eligible for enrollment in the OTD program.

In 1996, the Occupational Therapy faculty developed and received approval for a doctoral track in Therapeutic Science within the PhD in Kinesiology. This PhD track title was recently updated to “Occupational Science Track” to more closely align with other programs in the field. The objective of the PhD degree program is to provide advanced research and scholarly training to students who have completed a Master’s degree and are trained professionals in occupational therapy or a closely related field. Graduates of the Occupational Science track in the Kinesiology PhD program pursue academic careers as faculty, and as researchers in the basic and applied sciences upon which OT professional practice ultimately depends. Our faculty generates funding for research and training of students enrolled in the program.

The Occupational Therapy Program’s administration is located in the Department of Kinesiology and supported by the School of Education. The OT Program is housed in the University of Wisconsin-Madison Medical Sciences Center with Departmental offices in the Gymnasium/Natatorium. The entry-level professional training programs (BS-OT and now MS-OT) have been continuously accredited since 1946 by the American Medical Association, or more recently by the American Occupational Therapy Association’s accrediting body, the Accreditation Council for Occupational Therapy Education (ACOTE).

The proposed OTD will fill a niche between the current MS-OT and PhD in Kinesiology, Occupational Science track programs as a degree for students seeking advanced leadership and practical training for careers as managers, advanced OT practitioners, entrepreneurs, policy advisers, and faculty in teaching colleges and universities. Awarding of an OTD degree is
consistent with UW-Madison’s long history of graduating students with professional doctoral degrees including the MD (Doctor of Medicine), JD (Doctor of Jurisprudence), AuD (Doctor of Audiology), DPT (Doctor of Physical Therapy) and DNP (Doctor of Nursing Practice).

The OTD program will advance the learning of non-traditional students through the use of new and innovative learning technologies. Thus, this program will develop leaders, advocates and innovators in occupational therapy who will have the capacity to address the needs of the evolving health care and education systems. The program will place a strong emphasis on lifelong learning for occupational therapy practitioners, a value of the profession and a requirement for maintaining licensure as an occupational therapist in virtually all states including Wisconsin. We have the capability to provide distance education and training for students across the state and the nation using the most current learning technologies and strategies. New approaches to curriculum delivery will support offering a breadth of content and expanding students’ views of the world.

Specifically, the goals of the OTD Program are to:

- Recruit, admit and retain highly qualified students who are experienced occupational therapists with a masters’ degree or equivalent.
- Prepare experienced practitioners for new roles as team leaders, project managers, administrators, advocates, teachers, or entrepreneurs through didactic learning and inter-professional practice experiences.
- Graduate scholarly practitioners who promote and apply research evidence to the development of best practices in the field of occupational therapy.
- Recruit and retain faculty, academic staff, and inter-professional practice mentors who exemplify excellence in teaching and scholarship and serve as role models for the occupational therapy profession.

b. Relationship to existing programs

Students enrolled in the program will have the opportunity to focus their efforts and their capstone project in a specialty area of practice, but specialties will not be the primary focus of the curriculum. With its emphasis on leadership, inter-professional practice and research translation, the UW-Madison OTD curriculum is distinctly different from the curricula of other programs designed to develop advanced skills in a specialty practice area. If approved, the UW-Madison will be the first Midwestern institution to offer therapists the opportunity to pursue an advanced practice OTD from a public research university through a distance learning format. Outside of Wisconsin, there are eleven public universities currently offering advanced practice occupational therapy programs; five are situated at institutions classified as having “Very High Research Activity”. Of these only two are offered predominantly online, the University of Utah and University of Kansas Medical Center. There are two public universities offering an advanced practice OTD located in the Great Lakes region, the University of Illinois-Chicago (UIC) and Governor’s State University in Parkview, IL, both of which are onsite or hybrid programs. There are two private institutions based in the Great Lakes region
that offer online advanced practice OTD programs, Concordia University in Mequon, WI and Saint Catherine University in Minneapolis, MN.

c. Collaborative nature of the program

The structure of the curriculum, with its capstone project requiring inter-professional collaboration and links to direct practice, will facilitate the building of relationships between students, faculty and the inter-disciplinary practice community. It is increasingly recognized that solving the complex health care, policy and lifestyle management issues facing society will require collaboration across disciplinary boundaries. In this sense, the OTD program exemplifies the “Wisconsin Idea” as students will identify problems, create and implement solutions reaching out and working within their inter-professional communities to effect change in the practice environment under the mentorship of their faculty adviser. We are also engaged in a deliberative process to identify avenues for collaboration and cross fertilization between the OTD program and existing MS-OT and PhD curricula. We have fostered a relationship with the Department of Engineering Professional Development and have established an MOU (See Appendix B) for enrolling OTD students in their offerings of Professional Literacy courses. We are working closely with the Division of Continuing Studies on market analysis, communication strategies, instructional design, and program implementation as spelled out in an MOU (See Appendix B).

d. Integrated multicultural and diversity elements of curriculum

The UW-Madison Occupational Therapy Program values diversity, equity, inclusion and excellence in student, professional and therapeutic relationships. The profession’s Code of Ethics explicitly states a commitment to seven core values: (1) Altruism, (2) Equality, (3) Freedom, (4) Justice, (5) Dignity, (6) Truth, and (7) Prudence. We embrace these values and seek to uphold them in all aspects of our teaching and work.

The American Occupational Therapy Association’s (AOTA) 2017 Centennial Vision includes a commitment to creating a “diverse workforce”, a goal to which we are contributing through our efforts in student and faculty recruitment. The composition of the OT profession (86% Caucasian in 2006) leads to challenges in faculty and staff recruitment for the Program. Nevertheless, we strive for diversity. Recent demographic surveys indicate some success with the workforce demonstrating an increase in the number of previously underrepresented groups as students and therapists. We are committed to attracting faculty and staff from varied backgrounds and recognize that equity, inclusion and excellence must be a part of any plan to do so. We embrace and actively implement School of Education policies and procedures, as set forth and monitored by its Equity and Diversity Committee, to enhance diversity through our communication, recruitment and hiring efforts.

The OT Program has distinguished itself in recruitment of a diverse MS-OT student body with 17% of enrolled students from targeted minority groups. Our admissions criteria emphasize varied life experiences and engagement with persons from a multiplicity of demographic, ability, cultural, and social backgrounds. We expect the online delivery of the OTD program to further enhance diversity as the distance education model enables students from a broad array of geographic (including rural areas), cultural and employment settings to enroll. We anticipate
that the online delivery model will enable the OT Program to be responsible stewards of limited resources and to serve a non-traditional population of students. Our recruitment efforts will intentionally target communities with limited access to advanced training programs.

Throughout the curriculum we teach students to understand and reflect on occupational therapy professional values and behaviors. We prepare students to engage in a client-centered approach to therapy through experiences that encourage them to recognize that their own personal values and lifestyle may vary significantly from those of their patients, families or colleagues. The OTD curriculum includes elements requiring students to critically examine their own values, assumptions and limitations through self-reflection as they venture to develop new leadership skills. Students in the OTD Program will be challenged to view issues from the perspectives of others including their clients, families, and colleagues in diverse disciplines in the inter-professional context. Readings are specifically selected to draw from literature beyond the field of occupational therapy, to reflect diverse individual and population perspectives, and to raise awareness of local, national and global issues. Practice cases, dilemmas and scenarios which students will bring to class discussions will further contribute alternative viewpoints to the curriculum. Assignments are designed to promote team-based learning and collaboration and to facilitate integration of content across disciplinary boundaries in order to build consensus and generate solutions that are mutually acceptable.

e. Outreach

The Occupational Therapy Program is committed to the Wisconsin Idea and promotes community service among its students. The following is a representative sample of outreach activities which enrich the learning experiences of students in the OT Program:

**Professional**

- American Occupational Therapy Association (AOTA) Membership & Annual Conference attendance and presentation of research
- Wisconsin Occupational Therapy Association (WOTA) Membership & Annual Conference attendance and presentation of research
- Student Occupational Therapy Association members and representation in the AOTA governing body
- AOTA Annual Student Conclave participation
- Society for the Study of Occupation: USA Membership & Annual Conference attendance
- World Federation of Occupational Therapy participation and presentation of research

**Campus Events**

- Annual Caroline Thompson Memorial Lecture
- Day with the Experts hosted by the Waisman Center
- Global Health Institute events
- Health Occupations Student Association Career Fair
- Student panels and tours for prospective students
- Indigenous Health and Wellness Day
- Assistive Technology Fair
- Institute on Aging events
Alzheimer Research Day
Institute for Clinical and Translational Research training and activities
Parents as Experts: Learning from families, at Waisman Center
Wisconsin Leadership Education in Neurodevelopmental and Related Disabilities Program (MCH-LEND)
Office of Service Learning and Community Outreach
Wiley Lecture Series at the Waisman Center

Community Events
- Coordination of sensory-friendly dining events (e.g. Culver’s)
- SAPAR (School Age Parent Program) in Madison Metropolitan Schools
- Stroke survivor's group at Meriter Hospital
- Life Skills Groups for people with mental health challenges at UW Hospitals, Meriter Hospital and Cornucopia
- Only Leaves Should Fall, Falls Prevention Event held in conjunction with Safe Communities Fall Prevention Task Force
- Inter-professional Wellness Clinics for the Elders

The online nature of the OTD Program will make participation in some of these activities challenging for students at a distance. We are, however, designing alternative strategies to foster student participation including:

- Scheduling our Annual Caroline Thompson Memorial Lecture during the time students make their two required on campus visits
- Notifying students of relevant webinars offered through professional associations
- Providing links to live streaming or videotaped campus seminars, lectures and other events for student viewing (e.g. Waisman Center Webcasts, School of Human Ecology Center for Child & Family Well-being, Global Health Institute Presentations)
- Providing links to opportunities for community service
- Including curricular elements that involve service-learning in their own community

f. Governance and leadership structure

The OT Program is housed in the Department of Kinesiology, within the School of Education. The Department of Kinesiology Graduate Studies Committee provides oversight of all departmental graduate programs and in turn reports to the Kinesiology Executive Committee which oversees all undergraduate and graduate academic programs. Within our shared governance model, the OT Program graduate faculty will have primary responsibility for curriculum design, implementation and evaluation of the OTD program. The OT Program graduate faculty will make recommendations to the Kinesiology Executive Committee regarding the qualifications, hiring, and teaching assignments for instructional faculty and staff. Findings of program evaluation, including trends in enrollment and fiscal status will be closely monitored and reported to the Executive Committee annually.

An OTD Graduate Program Coordinator position will be created at 25% on a 12 month basis. An individual will be selected according to policy and procedures set by Kinesiology’s
Executive Committee and consistent with School of Education and UW-Madison Human Resource practices. The newly appointed OTD Graduate Program Coordinator will manage the day-to-day operation and, with administrative support, will: (1) oversee the recruitment and admissions process; (2) monitor day-to-day implementation of the instructional program including, but not limited to, teaching needs, class schedules, curriculum revision; (3) oversee needs assessment and program evaluation activities; (4) conduct academic and career advising; (5) maintain communications with the Registrar’s Office, the Dean’s office, the Division of Continuing Studies and units on campus supporting distance learning technology; (6) monitor the income, expenses and annually estimate the fiscal needs of the program; and (7) in consultation with the OT Program graduate faculty, department Executive Committee and the Dean, assist in the recruitment and training of program faculty and staff.

2. **Program Curriculum**

   a. Design, structure, breadth and milestone requirements

   *Curriculum Design*

   The curriculum design includes three key strands:

   i. **Foundation Courses**: This strand of the curriculum will enhance student understanding of the theories contributing to occupational science and occupational therapy practice. Students will be guided through an exploration of the evolution and changing landscape of the practice environment, particularly as relates to current policy initiatives, trends in leadership, administrative, management and educational practices, and emerging inter-professional models of practice. The scientific evidence supporting or refuting current practices of occupational therapy in health, education and community contexts will be explored.

   ii. **Advanced Professional Development**: In this strand, students will develop professional goals and advanced skills in the areas of communication, leadership, and management. Using their real-world practice experiences students will be challenged to identify their current competencies, apply leadership theories, manage complex projects, develop effective communication strategies, and more fully integrate occupational therapy within inter-professional contexts.

   iii. **Translating Evidence**: Through the third strand of the curriculum, students will critique the theoretical, clinical and empirical evidence from multi-disciplinary perspectives to inform best practice of occupational therapy in their own practice context. They will learn methods for gathering, analyzing, synthesizing and interpreting relevant data and apply these skills to the completion of a capstone project that fills a gap or need in the current practice environment.

   The curriculum expands core content of entry-level occupational therapy clinical, research and professional skills training to build advanced competencies in the following areas:

   - Articulating and integrating the intersection of human occupation, participation, and health into professional roles and work and community settings
• Recognizing and formulating responses to evolving developments in practice, policy and research
• Developing and achieving professional goals
• Collaborating and communicating within inter-professional contexts
• Leading and managing inter-professional teams
• Applying current evidence to occupational therapy interventions and practice
• Translating data and research findings to promote best practice in inter-professional work, policy and advocacy environments
• Designing, implementing and evaluating innovative programs to address community needs and emerging healthcare issues

Structure

Students will enter the OTD Program as a cohort of Masters’ prepared occupational therapists and progress through the prescribed curriculum synchronously. As certified and licensed occupational therapists, the students will already have competency in professional practice skills. The OTD curriculum will promote advanced learning of health care leadership and management, the theories and evidence supporting practice, applied and translational research, and inter-professional practice and communication. The Doctor of Occupational Therapy curriculum requires 3-years of part-time online course work and completion of 34-credits beyond the Masters’ degree. Faculty will deliver content primarily online, enhancing interactions with students through use of project-based learning, chats, discussion boards, facilitated virtual synchronous discussions, and other active learning opportunities. To support the need for flexibility among the students as practicing therapists, much of the online didactic content will be structured to enable students to complete activities according their own scheduling needs but within the time constraints of the course offering.

Students will make 2 visits to campus for 3-5 days each over the course of the three year program. The first visit will occur near the beginning of the program and will include orientation activities, opportunities to meet and build a learning community with other students in the cohort as well as faculty and staff. They will also begin their professional development plan and attend a research and capstone project presentation event featuring the work of the graduating MS-OT students and, after the first 3 years of the OTD program, the prior cohort of graduating OTD students. The second visit will occur at the end of the program and will include a meeting with the capstone project review committee, presentation of their project, preparation for peer-review and dissemination, and program evaluation activities.

Table 2 provides an overview of the planned curriculum and how students will meet the minimum requirements for the OTD degree.

Through team- and problem-based learning strategies, the curriculum will challenge students to engage in collaborative analysis, synthesis, and evaluation of inter-professional case scenarios. Students will bring their practice experience to the virtual classroom which will enrich the applied nature of the curriculum and provide substance to course content.
Breadth & Depth of Content

Students in the OTD program will be exposed to a breadth and depth of content that will expand their view of occupational therapy’s role in inter-professional contexts and global arenas. The depth and breadth requirement for graduate programs at the UW-Madison will be met through curricular elements that require student exposure to content from disciplines outside of their primary area of training and practice. Course readings, assignments and activities will require integration of multidisciplinary theories, global perspectives and practices. The requirements for completion of a capstone project will include elements of inter-professional collaboration and presentation to an inter-professional audience. Three specific criteria for meeting depth and breadth are specified below. During the second semester of enrollment, students will submit a curriculum plan for approval that describes how each of the criteria will be achieved. The proposal will be reviewed and approved by the OTD Graduate Program Coordinator and at least one OT Program graduate faculty member. Specifically, student curriculum proposals must include the following:

1. **Inter-disciplinary coursework (Minimum of 5 credits):**
   a. During the first semester of the program, students will take a minimum of two 1 credit courses from the Professional Literacies Suite offered through the Department of Engineering Professional Development. The courses are being developed to enroll students from multiple disciplines which will enhance student exposure to ideas and practices from other fields. These foundational courses, aimed at the development of professional competencies, will prepare students for success in the online learning environment and enable them to build skills towards achievement of professional goals.

   AND

   b. The inter-professional nature of occupational therapy practice requires students to gain an appreciation for research and practice in fields beyond their own. Students are required to complete a minimum of 3 credits of graduate work from the following options:

      i. **Independent study (Maximum 1 credit)** – To meet this requirement, the student must submit a proposal to his or her primary adviser and the OTD Graduate Program Coordinator for completion of a learning experience beyond the required OTD coursework that demonstrates exposure to content in a field outside of occupational therapy. The proposed experience should be consistent with and included in the student’s professional development plan. As a requirement of the learning experience, the student must submit a substantial product reflecting what was learned (e.g. literature review, reflection paper, poster, program plan). Examples of learning experiences that would meet this requirement include involvement in a research project, an interdisciplinary service-learning project, substantial contributions to the work of an interdisciplinary professional association, planning and implementation of an inter-professional continuing education workshop, writing a peer-reviewed manuscript which addresses an inter-professional or leadership issue, or conducting a needs assessment for development of a new inter-professional program or service.
ii. Inter-professional Seminar (3+ credits) – The purpose of this seminar requirement is to ensure exposure to the theories, ideas, practices and evidence in fields beyond OT. Students may satisfy each 1 credit seminar requirement through attending and documenting a minimum of 10 contact hours of workshop, seminar, continuing education or technical presentations (in person or virtually) that reflect content beyond their current scope of practice and training. Each seminar experience will require students to submit a proposal for approval by the primary adviser and OTD Graduate Program Coordinator that reflects the inter-professional nature of the content and how it aligns with his or her professional development plan. Students will also complete a form documenting the completion of the content at the end of each seminar.

2. **Inter-professional development plan and mentoring:** Students will create a professional development plan that includes, at a minimum, one goal related to advancing their inter-professional communication and collaboration skills. Students will build a portfolio over the course of their time in the program that demonstrates their progress on achieving their identified goals. With the guidance, support and approval of the OTD Graduate Program Coordinator, students will identify at least one leader from outside the field of OT to serve as a mentor who will review and provide ongoing feedback on the portfolio. The inter-professional mentor might be from fields such as physical therapy, speech-language therapy, public health, special education, human factors engineering, rehabilitation psychology, mental health, medicine, nursing, health/education policy, or business. The final portfolio will be reviewed and critiqued by peers in the student cohort, the OTD Graduate Program Coordinator, and the student’s inter-professional mentor.

3. **Collaborative capstone experience (Minimum of 7 credits):** The capstone project provides students with direct experience in an inter-professional collaborative activity under the guidance of a mentor committee. Students will design and develop this project in a series of capstone project courses (7 credits) with a faculty mentor’s guidance. Explicit criteria for development of the capstone project will be provided to each enrolled student and, at a minimum, will require that the project: a) include ideas, concepts, or techniques beyond those currently in practice; b) make a substantive contribution to knowledge or practice in the field; c) demonstrate breadth of learning; and d) advance inter-professional practice for the benefit of society.

The student will report the results of the project in a written paper and submission of the project outcome to a peer-reviewed inter-professional audience (e.g. publishable manuscript, professional conference presentation). The faculty mentor will work with each student in identifying a mentor committee tailored to the project’s focus that meets the minimum following requirements:

- One UW-Madison Graduate faculty mentor
- One additional UW-Madison Faculty or Academic Staff with a doctoral degree
- One practitioner with a masters or doctoral degree having demonstrated expertise in the area of project content
- One certified and licensed occupational therapist (who could also fill the roles as mentor or expert practitioner)
- One expert in content outside the field of OT. (This individual may also serve as the student mentor for the portfolio project noted above.)
One member of the student mentor committee will be identified as the primary mentor.

All final capstone projects must be approved by a review committee consisting of a minimum of five Graduate Faculty, four of whom will be from UW-Madison. At least one designated Graduate Faculty Mentor from a student’s capstone project committee will serve as a member of the review committee when that student’s work is being reviewed.

Our dedication to scientific rigor and involving our MS-OT students in faculty research across the curriculum enables them to benefit from the best the UW-Madison has to offer - its faculty expertise, libraries, and research activities. We will extend this enriched learning atmosphere to advanced practitioners who are engaged in the daily world of occupational therapy. Our OT Program faculty is multi-disciplinary with backgrounds in occupational science, public health, cognitive psychology, educational leadership, motor development/control, and biomechanics ensuring a rich environment for promoting depth and breadth of training. Our OT faculty has established collaborations with a number of international scholars and has hosted visiting scholars in their research programs. Faculty members also regularly present their research at international conferences and publish in trans-disciplinary journals. Population-based and global perspectives are shared in the classroom and broaden the student experience. Further, faculty collaborations with other Departments and programs across campus (e.g. Biomedical Engineering, Center for Patient Partnerships, Population Health Science, Communicative Sciences and Disorders, Nursing, Pharmacy, Physical Therapy, Social Work) and in the community will naturally enhance inter-professional interactions and an expanded view of the complex environments in which therapists live and work. Faculty will invite appropriate colleagues to serve on mentoring committees for capstone projects. Through class activities and capstone projects, students will apply evidence to practice and, in so doing, will be exemplars of translational research. Students will have opportunities throughout the curriculum to critique and synthesize the evidence related to interventions, programs and practices used in their work environment.

Credit requirements

All OTD graduates will meet the UW-Madison Graduate School criteria of completing a minimum of 51 graduate credits, with a minimum of 32 credits in courses numbered 300 and above earned as a graduate student at UW-Madison. Enrollees who have an MS-OT degree or a BS-OT and a Master’s degree in a related field (minimum of 30 graduate credits) will complete 34 graduate credits in the OTD Program over 9 semesters (3 years). Of these 34 credits, 22 will be core didactic content, 5 will be specific to a student’s individualized curriculum and professional development plan, and 7 credits will be associated with the capstone project. Occupational therapists with BS-OT degrees who are admitted to the program must obtain an additional 30 graduate credits as outlined below in the Proposed Curriculum Design (Table 2).

b. Course overview and approval process

Table 2 provides an overview of the course sequence, credits per course and a brief description of content. With the exception of Kines 785 – Human Occupation and Health, the curriculum is new and the syllabi are currently in review for course approval at UW-Madison. The Kines 785 course is currently a 3 credit course designed for our PhD trainees. The scope of the course has
been modified to permit enrollment for 2 or 3 credits and a course change proposal has been submitted and is under review. Draft syllabi of required courses may be found in Appendix C.

Beyond the core courses offered by the OT Program faculty and staff, students will fulfill the breadth requirements as stated above in the curriculum description, including the Professional Literacy Courses being developed and approved through the Department of Engineering Professional Development (see Appendix B).

c. Recruitment plan

The OT Program and the Division of Continuing Studies will jointly support recruitment efforts. The Division of Continuing Studies will provide support for the development of marketing materials and access to the Program through the “Advance Your Career” web portal. The chart below lists the target populations by priority group and planned recruitment strategies.

State authorizations for online programs may limit enrollment from selected states. Appendix D includes a list of current state authorizations. We will not actively recruit admit students from states that limit authorization.

d. Admissions requirements

i. OT Licensure: Applicants are required to have a current state OT license in the U.S.. An official copy of the license will be required for admission. Students who are in the final year of a didactic Master’s in occupational therapy education program may also apply but their matriculation into the OTD program will be contingent upon successful completion of fieldwork, NBCOT certification and receipt of a state OT license.

ii. Degree: A minimum equivalency of 30 UW-Madison Graduate credit hours beyond the Bachelor’s degree is required for admission into the OTD Program. It is expected that most applicants will meet this requirement through having obtained a Master’s degree in Occupational Therapy or a related field. Individuals with a Bachelor’s degree may apply but will be required to take graduate credits as outlined in Table 2 to meet any deficiencies. The total number of graduate credits required to obtain the OTD degree is 64 including the prerequisite 30 graduate credit hours plus 34 graduate credit hours in residency at UW-Madison.

Prospective students with bachelor’s degrees will be advised by the Admissions Coordinator and graduate faculty regarding on-campus and distance options for meeting deficiencies in the minimum graduate credit requirements. For example, the OTD admissions committee may decide to accept coursework completed outside of the student’s graduate career at UW-Madison when those courses are rigorous and meet the expectations of graduate work for the degree and also meet the prior course work parameters dictated by Graduate School policy. Graduate school policies governing special student versus graduate student status and the length of time since graduate credits were earned will apply to all prospective students.
### Table 2: Proposed Curriculum Design

<table>
<thead>
<tr>
<th><strong>Minimum Graduate Credits for Admissions</strong></th>
<th>Credits</th>
</tr>
</thead>
<tbody>
<tr>
<td>Master’s degree in OT OR Bachelor’s degree in OT plus Master’s degree in related field (e.g. Special Education, Public Health, Educational Policy)</td>
<td>30</td>
</tr>
<tr>
<td><strong>OR</strong></td>
<td></td>
</tr>
<tr>
<td>Bachelor’s degree in Occupational Therapy plus completion of graduate work equivalent to the following:</td>
<td></td>
</tr>
<tr>
<td>1. Graduate Statistics Course</td>
<td>3</td>
</tr>
<tr>
<td>2. OT 671 Scientific Inquiry in OT I: Evidence-Based Practice OR Comparable Graduate course in Evidence-Based Practice</td>
<td>2</td>
</tr>
<tr>
<td>3. OT 672 Scientific Inquiry in OT II: Methods of Inquiry OR Comparable Graduate course in Research Design &amp; Methods</td>
<td>2</td>
</tr>
<tr>
<td>4. OT 673 Scientific Inquiry in OT III: Data Collection/Analysis OR Comparable Graduate course in Statistical Analysis</td>
<td>3</td>
</tr>
<tr>
<td>5. OT 674 Scientific Inquiry in OT IV: Sci Writing for Publication OR Comparable Graduate course in Scientific Writing</td>
<td>2</td>
</tr>
<tr>
<td>6. OT 612 Prof. Skills III: Org &amp; Management in OT Practice OR Comparable Graduate course in Health Systems Org &amp; Mgmt</td>
<td>3</td>
</tr>
<tr>
<td>7. OT 613 Prof Skills IV: Community-Based OT Practice OR Comparable Graduate course in Community Interventions</td>
<td>2</td>
</tr>
<tr>
<td>8. Additional Graduate Course Work. (Advanced Practice Board Certification may be substituted for 4 of the 13 Graduate Credits)</td>
<td>13</td>
</tr>
<tr>
<td>Minimum Graduate credits required for admission to OTD</td>
<td>30</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>OTD Curriculum - In residency at UW-Madison</strong></th>
<th>Semester</th>
<th>Credits</th>
</tr>
</thead>
<tbody>
<tr>
<td>EPD Professional Literacy Courses</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Based on the findings of a competency assessment completed at admission, students will enroll in 2-3 of the following:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>EPD 501 Managing Information</td>
<td>S1</td>
<td>2</td>
</tr>
<tr>
<td>EPD 505 Digital Proficiency</td>
<td></td>
<td></td>
</tr>
<tr>
<td>EPD 506 Effective Professional Communication</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Occ Ther 811 Applied Inter-professional Leadership and Management</td>
<td>F1</td>
<td>3</td>
</tr>
<tr>
<td>Kines 785 Human Occupation and Health</td>
<td>F1</td>
<td>2</td>
</tr>
<tr>
<td>Occ Ther 812 Current Trends Shaping OT Practice</td>
<td>Sp1</td>
<td>3</td>
</tr>
<tr>
<td>Occ Ther 891 Capstone Project I - Need Identification: Development of Problem Statement</td>
<td>Sp1</td>
<td>1</td>
</tr>
<tr>
<td>Occ Ther 813 Advanced Practice in Inter-professional Contexts</td>
<td>S2</td>
<td>3</td>
</tr>
<tr>
<td>Breadth Requirement I (3 credits required by end of program)</td>
<td>S2</td>
<td>1</td>
</tr>
<tr>
<td>Occ Ther 871 Application of OT Evidence in the Practice Environment</td>
<td>F2</td>
<td>2</td>
</tr>
<tr>
<td>Occ Ther 891 Capstone Project II - Gathering Evidence: Theoretical, Clinical &amp; Empirical</td>
<td>F2</td>
<td>1</td>
</tr>
<tr>
<td>Breadth Requirement II</td>
<td>F2</td>
<td>1</td>
</tr>
<tr>
<td>Occ Ther 872 Using Information to Optimize Practice</td>
<td>Sp2</td>
<td>3</td>
</tr>
<tr>
<td>Occ Ther 891 Capstone Project III - Project Design &amp; Proposal: Program Description, Evaluation, Funding &amp; Dissemination Plan</td>
<td>Sp2</td>
<td>1</td>
</tr>
<tr>
<td>Occ Ther 814 Communicating OT to Inter-professional Audiences</td>
<td>S3</td>
<td>3</td>
</tr>
<tr>
<td>Occ Ther 873 Advanced Outcome Measurement in Occupational Therapy</td>
<td>F3</td>
<td>3</td>
</tr>
<tr>
<td>Occ Ther 891 Capstone Project IV: Project Implementation</td>
<td>F3</td>
<td>1</td>
</tr>
<tr>
<td>Occ Ther 892 Capstone Project V: Project Completion, Presentation &amp; Dissemination</td>
<td>Sp3</td>
<td>3</td>
</tr>
<tr>
<td>Breadth Requirement III</td>
<td>Sp3</td>
<td>1</td>
</tr>
<tr>
<td><strong>Subtotal</strong></td>
<td></td>
<td>34</td>
</tr>
<tr>
<td><strong>TOTAL Graduate Credits for OTD Degree</strong></td>
<td></td>
<td>64</td>
</tr>
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</table>
Table 3: Targeted Populations and Recruitment Strategies

<table>
<thead>
<tr>
<th>Target Population</th>
<th>Recruitment Strategies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tier 1. Licensed OTs with Master’s degree, Alumni, WI Residents</td>
<td>OT Program Webpage; DCS “Advance Your Career” Web Portal; Alumni email listserv; Wisconsin OT Association (WOTA) email listserv; Wisconsin OT Master’s programs (UW-Milwaukee, UW-LaCrosse, Concordia University, Mount Mary University); Current/Previous Fieldwork Supervisor and Alumni Employer lists; OT Program Newsletter (OT Matters); Advertisements in Wisconsin/Midwest OT Publications (e.g. State association newsletters); Booth and/or fliers at the Midwest OT Dean’s Annual Conference</td>
</tr>
<tr>
<td>Tier 2. Licensed OTs with Master’s degree, Alumni, primary Midwest residency and secondary outside the Midwest</td>
<td></td>
</tr>
<tr>
<td>Tier 3. Licensed OTs with Master’s degree, Non-Alumni, primary Wisconsin residency</td>
<td>*Recruit Tier 1 and 2 simultaneously as similar strategies</td>
</tr>
<tr>
<td>Tier 4. Licensed OTs with Master’s degree, Non-alumni, Non-Wisconsin residents</td>
<td>Advertisements in AOTA Related Publications (e.g. AOTA Alerts, OT Practice); Visible presence (i.e. fliers, booth) at relevant Professional Meetings (AOTA Conference, OT Program Director Meetings, Pediatric Research Group, OT Research Summit, Society for the Study of Occupation); AOTA member list of targeted groups; College/University listservs targeting schools that currently don’t have doctoral programs</td>
</tr>
<tr>
<td>Tier 5. Licensed OTs with Bachelor’s degree from WI and other States</td>
<td>Same as above with emphasis on requirements for meeting Master’s level training/prerequisites</td>
</tr>
</tbody>
</table>

iii. GPA: A minimum cumulative grade point average (GPA) of 3.0 on a 4.0 scale in graduate coursework.

iv. GRE: The Graduate Record Examination (GRE) is not required for applicants who have a Master’s degree from an accredited institution, but will be required for applicants whose terminal degree is a Bachelor’s degree.

v. Experience: Clinical experience beyond occupational therapy fieldwork is helpful but is not a requirement for entry into the OTD program.

e. Admissions Process

i. Application Fee: Students will pay the standard UW-Madison Graduate application fee.

ii. Graduate School Application: Applicants must complete a UW-Madison Graduate School application.

iii. Personal Statement: A personal statement describing the purpose for pursuing a doctoral degree in occupational therapy is required. The statement may not exceed three pages typed, double-spaced, one-inch margins with 12 point font and should address the following topics: (1) Describe professional experiences that led you to pursue an OTD; (2) Discuss how your long-term career goals align with the focus of...
UW-Madison’s OTD program, specifically the Program’s focus on inter-professional collaboration, visionary leadership, and the translation of evidence in practice; (3) Discuss a potential topic(s) for your Capstone Project, what you believe you will need in terms of mentoring to complete the project, and potential mentoring team members from the OT Program and beyond.

iv. Resume/CV: Applicants are required to submit an updated resume or CV which includes: (1) Educational history (institutions, degrees, GPA, awards/honors); (2) Professional work history (e.g. occupational therapy experience, employment settings, populations, job titles and responsibilities, project management); (3) Listing of professional involvements (e.g. professional associations, advanced training/certification, teaching experiences)

v. Academic Transcripts: For applicants with Master’s degrees, official transcripts from each graduate institution attended must be mailed in a sealed envelope directly from the registrar of the institution. For those with Bachelor’s degrees, official transcripts from each post-secondary institution attended, including anywhere undergraduate or graduate coursework was completed, must be mailed in a sealed envelope directly from the registrar of the institution.

vi. Recommendations: Applicants will be required to submit three letters of recommendation from professors, co-workers, supervisors, and/or other professionals familiar with their capabilities to succeed in an OTD program.

vii. Admission Timeline: Priority application deadline will be March 1st, however, we will review and accept applications until slots are filled. Students will be informed of their admission status no later than early May. Students will be admitted as a cohort for summer semester matriculation. Applicants who are completing their Level II Fieldwork for their MS-OT degree may apply and be accepted but would not start coursework until the completion of their final Level II Fieldwork and acquisition of state licensure.

f. Projected Enrollment

The enrollment for the OTD is projected to increase to total capacity of approximately 60 students by year 5 of the program (i.e. 20 newly admitted per year) as noted above under item B.6.

g. Progress to degree

After completing the prerequisite 30 graduate credits, students will enter the program as a cohort and progress through the curriculum together as laid out in the course sequence. The OTD Graduate Program Coordinator will closely monitor student progress and work with students to make adjustments as needed. Potential barriers to degree completion include the time demands of a student’s work schedule, personal life responsibilities and the cost of enrollment. The program is specifically designed to be offered on a part-time basis to facilitate therapist enrollment while maintaining other employment and personal responsibilities. Additionally, upon acceptance into the program, students will be required to demonstrate
competencies in the areas of information and time management, digital technology and professional communication. A questionnaire designed to assess student competencies in these areas will be sent to students upon acceptance into the program. The curriculum, with its early emphasis on digital proficiency, information management and professional communication skills, is designed to promote student success by providing tools and strategies for managing time, online learning and streamlining communication.

The OT Program has and continues to build scholarship funds which will aid students with financial need. Students will be informed of opportunities to apply for these resources upon acceptance into the program. Enrollment in a graduate program is a major investment for potential students, but as employed therapists, it is likely that they have some resources to support their commitment to advanced study. Also, we will encourage applicants to check with their employer to see if a tuition support program or other resources are available.

The OTD Program will adhere to Graduate School policies for Minimum Degree Requirements and Satisfactory Progress for Doctoral degrees (See Appendix E).

3. Student Learning Outcomes

a. Program learning goals

A complete description of the OTD Program Learning Goals and Assessment Plan can be found in Appendix F. The plan includes specific learning goals based on GFEC learning goals for doctoral programs, a curriculum map articulating where the goals are addressed in the curriculum, a description of the planned direct and indirect measures of learning outcomes, and plans for faculty review of the findings and annual reporting.

Briefly, students will develop advanced competencies in:

- Articulating and integrating the intersection of human occupation and health into work roles and settings,
- Measuring and monitoring outcomes at the individual and population levels,
- Developing systems for data collection and management, translation of research findings, and application of new evidence to promote best practice in inter-professional practice, policy and advocacy environments,
- Collaborating and communicating complex ideas in inter-professional contexts,
- Leading and managing inter-professional teams,
- Designing, implementing and evaluating innovative programs,
- Developing and achieving professional career goals

b. Assessment of learning outcomes:

Learning outcomes will be assessed in multiple ways across the program. Appendix F provides detailed descriptions of the strategies that will be used in the student assessment and program review process. Direct assessment of student learning will occur in multiple ways including, but not limited to: (1) embedded exams; (2) pre- and post-program self-assessment of professional skills and development plans; (3) peer and faculty evaluation of professional e-
portfolios; and (4) performance on the capstone project (as evaluated by the graduate faculty project review committee using established criteria). Indirect methods of assessment will include: (1) course evaluations; (2) student satisfaction surveys and exit interviews; (3) alumni surveys at 1-, 5-, and 10-years post-graduation; (4) biennial employer surveys; and (5) biennial advisory committee meetings. The post-assessment of core inter-professional competencies, student focus groups and exit interviews will occur at the end of the curriculum during the students’ second visit to campus. The results of these evaluations and student comments will reviewed at an annual OTD Program Evaluation meeting of the faculty to make adjustments in course content or instructional delivery, as needed.

4. Advising and Student Services

a. Academic and career advising:

Initially, the OTD Graduate Program Coordinator will be the primary academic and career advisor for OTD students. Specifically, the Coordinator will:

- Assist students in clarifying their professional values, goals, and academic potential
- Provide information about educational options, requirements, policies, & procedures
- Aid students in a curriculum plan consistent with their professional goals, the requirements of their degree program, and their own interests and abilities
- Assist students in the continual monitoring and evaluation of their educational progress
- Help students to locate and integrate the online resources of the University to meet their unique needs and aspirations
- Consult with students on strategies for managing personal life stressors or challenges that are impacting academic progress and identifying OT Program and University resources available to students

As the OTD program grows, the graduate faculty will monitor whether there is a need to expand the advisor role to include additional faculty as advisors.

Students will be provided a comprehensive Graduate Student Handbook of Academic Policies and Procedure that will include details of advising, degree requirements, academic and conduct expectations, disciplinary and grievance procedures, online access to resources, technology use guidelines and other information pertinent to their success at UW-Madison. We will use our current MS-OT Student Handbook, Kinesiology Graduate Student Handbook and the template provided by the Graduate School as guides in developing the OTD Graduate Student Handbook. Specific to the non-pooled nature of the OTD program, we will include in the Handbook and in Admissions letters, policies regarding Graduate Assistantships and Program/Course Enrollment. Students enrolled in the program will not be permitted to accept graduate assistantships or other university appointments that would result in a tuition waiver. They also will not be permitted to enroll in other graduate programs or take courses outside the prescribe curriculum.
b. Capstone Project Mentoring:

As noted above, each OTD student will have a mentoring team to support their capstone project development and implementation. The team will consist of a Graduate faculty mentor, one additional UW-Madison faculty or academic staff with a doctoral degree, and an individual who has expertise in the content related to the OTD student’s proposed capstone project. At least one member must hold an OT degree and at least one must be from outside the field of OT. One member may be a community practitioner, professional leader, or faculty or academic staff member at another institution of higher learning. The OTD student’s mentoring team will be established by the end of their third semester in the program to allow for adequate development and completion of the project within the projected timeline for degree completion. The OTD Graduate Program Coordinator will assist students in identifying and will approve appropriate mentoring team members. Upon completion of the capstone project, a review committee of graduate faculty will determine if the project meets sufficient criteria to pass. We will adhere to UW-Madison Graduate School policies for approval of doctoral work and signing of warrants in the composition of the review committee (i.e. minimum of five Graduate Faculty, with at least four from UW-Madison).

c. Career advising:

As the program will serve the needs of occupational therapists and is designed to promote professional development and advancement, career advising will be an integral part of the program curriculum. The OTD Graduate Program Coordinator, Mentoring Committee and peer professionals will all provide input and feedback as students create and implement their professional development plan and e-portfolio.

d. Student support services:

Students enrolled at UW-Madison enjoy access to the support resources of a world-class institution. In addition to faculty expertise and extensive library resources, students have access to information technology support within the Department, the School of Education, through the Division of Continuing Studies and DoIT. The campus has an extensive technology network, including a Virtual Private Network (VPN), which permits on-line access to campus computing resources from virtually any location in which the student has access to the internet. The OT Graduate Student Handbook will include detailed instructions for accessing course content, library services and other student supports. The OT Program has a web portal on the Ebling Library website (http://researchguides.ebling.library.wisc.edu/c.php?g=293231&p=1952684) with links to many of the electronic databases, journals, books, and resources available to students. Ebling Library has a catalogue of tutorials for negotiating library resources including a tutorial titled “Accessing Online Resources from Off Campus” which we will require students to view.

The Division of Continuing Studies (DCS), in collaboration with the OTD Program, will provide students with technical services and support for learning in the online environment. DCS instructional designers will assist instructors in course development and ensure that we adhere to best practices as delineated in the Quality Matters Standards for online learning. DCS is also actively developing Community of Practice websites for engaging students and alumni.
through the online environment at UW-Madison. We will support this effort by providing appropriate content and suggestions for OTD student involvement in a Community of Practice.

The following is a list of campus resources that will be available to students enrolled in the OTD Program. Essential resources can be accessed through virtual means:

### Table 4: Student Support Services

<table>
<thead>
<tr>
<th>Occupational Therapy Instructional Technology and Resources</th>
<th>Support for online learning and technology issues will be provided by:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Division of Continuing Studies</td>
</tr>
<tr>
<td></td>
<td>School of Education MERIT staff</td>
</tr>
<tr>
<td></td>
<td>Department of Kinesiology Information Technology Specialist</td>
</tr>
<tr>
<td>Libraries</td>
<td>HSLC (Ebling Library) 750 Highland Ave.</td>
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<tr>
<td></td>
<td>Other campus libraries: <a href="http://www.library.wisc.edu">http://www.library.wisc.edu</a></td>
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<td>For access to e-journals, e-article delivery, etc.</td>
</tr>
<tr>
<td>Division of Information Technology (DoIT)</td>
<td>DoIT Knowledgebase: <a href="https://kb.wisc.edu/">https://kb.wisc.edu/</a></td>
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<td></td>
<td>DoIT Help Desk: <a href="https://kb.wisc.edu/helpdesk/">https://kb.wisc.edu/helpdesk/</a></td>
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<td>DoIT Webpage: <a href="http://www.doit.wisc.edu/">http://www.doit.wisc.edu/</a></td>
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<tr>
<td>Division of Continuing Studies</td>
<td>UW-Madison Continuing Studies</td>
</tr>
<tr>
<td></td>
<td>21 N. Park Street, 7th floor</td>
</tr>
<tr>
<td></td>
<td>Madison, WI 53715 map»</td>
</tr>
<tr>
<td></td>
<td>Phone: (608) 262-1156; Email: <a href="mailto:info@dcs.wisc.edu">info@dcs.wisc.edu</a></td>
</tr>
<tr>
<td>Communication</td>
<td>Given the online nature of the program, communication will be primarily</td>
</tr>
<tr>
<td></td>
<td>through email and online postings on course webpages or an intranet.</td>
</tr>
<tr>
<td>McBurney Resource Center</td>
<td>When appropriate, students will be referred to the McBurney Center for</td>
</tr>
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<td></td>
<td>support and accommodations:</td>
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<tr>
<td></td>
<td>702 W. Johnson Street, Suite 2104 (phone) 608-263-2741</td>
</tr>
<tr>
<td></td>
<td>(text) 608-225-7956 <a href="mailto:mcburney@studentlife.wisc.edu">mcburney@studentlife.wisc.edu</a></td>
</tr>
<tr>
<td>School of Education Remote Application Delivery (WCER ADS)</td>
<td>Application software and electronic resource library for School of</td>
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<td>Education faculty and graduate students</td>
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</table>

5. **Program Faculty, Instructional Staff and other Key Personnel**

As an advanced level graduate program, the OTD curriculum will require involvement of faculty and academic staff trained at the doctoral level. The current constellation of faculty within the OT Program includes 6 tenure-track graduate faculty with terminal doctoral degrees, 1 full-time academic instructional staff, and 2 FTE adjunct instructional staff. Our full-time academic staff member is currently pursuing a doctoral degree which will provide the qualifications for teaching in the OTD Program. Of our six graduate faculty members, three are Assistant Professors, two are Associate Professors and one is a Full Professor.

We have devised a plan to enable us to protect the quality of instruction at all three levels of our graduate programs (MS-OT, OTD and Kinesiology PhD). Our MS-OT and PhD programs will continue to be funded through the 101 mechanism. The OTD will be funded through the 131 mechanism. Tuition dollars generated through the OTD program will completely support its operation. In some cases, the revenue generated from the OTD will be used to hire academic staff to cover faculty currently teaching MS-OT content if the faculty member chooses to instruct OTD courses. The proposed budget (see Item 6) includes allocations for
hiring additional instructional personnel to cover teaching gaps in the OT Program. We will hire instructors with appropriate credentials and training, specifically terminal degrees at the doctoral level, to teach the OTD program curriculum. There may, again, be exceptional circumstances in which a master’s prepared instructor with advanced specialty expertise would be considered for teaching specific content in the OTD program.

In the MS-OT, OTD and PhD Programs we will adhere to departmental standard of 10 workloads for teaching in an academic year remaining consistent with these general principles:

- Reduced teaching load relative to the department standard for Assistant Professors with special consideration at times of critical juncture (e.g. first year of teaching)
- Matching faculty interests and skills to course and program content (MS vs. OTD vs. PhD)
- Consideration of course preparation time in assigning loads, particularly for lab-based or first offerings of online courses
- Provision of TA support with preference given to Assistant Professors, lab-based, writing intensive, or new online courses

The OT Program uses a shared governance model in faculty and staff hiring and in determining teaching responsibilities. All graduate faculty are fully involved in decisions regarding the qualifications and assignment of instructors to courses in the OT curricula.

Potential advantages for graduate faculty to teaching in the OTD Program include: (a) working with students engaged in higher level, self-initiated learning activities, (b) smaller class size than our MS-OT courses allowing richer interpersonal interactions, and (c) flexibility in timing and delivery of course content. Initially, we plan to recruit senior faculty, academic or hired adjunct staff to teach the OTD curriculum. Faculty, particularly Assistant Professors, may opt to teach OTD content when doing so is perceived as useful or will minimize their teaching responsibilities or maximize their course preparation efforts. Whenever possible, we will honor preferences for teaching in the different OT Program curricula.

To protect faculty time and provide support for development of the OTD curricula, we have budgeted one month of summer salary for each new OTD course to be developed. Course instructors will further develop the course objectives and determine best methods for delivery of online content. The Division of Continuing Studies has committed to providing support including instructional design, web-page creation, management of content delivery, and technology assistance for the first 3 years of each course. The following is a list of our current faculty and staff:

**Full-time, tenure-track faculty in OT Program**

Karla Ausderau, Ph.D., Assistant Professor  
Ruth Benedict, Dr. P.H., Associate Professor, OT Program Faculty Director  
Dorothy Edwards, Ph.D., Professor  
Elizabeth Larson, Ph.D., Associate Professor
Kristin Pickett, Ph.D., Assistant Professor  
Brittany Travers, Ph.D., Assistant Professor

See Appendix G for short biographical descriptions of core faculty members

**Academic Staff**
Debbie Bebeau, M.S., OTR: Clinical Instructor, 100%; Currently pursuing Ed.D. in Higher Education, expected completion December 2016  
Sharon Gartland, OTD, OTR: Lecturer, 17%;

**Affiliate Faculty**
Additional part-time adjunct or affiliate faculty will be hired to supplement current faculty expertise and teach in specialized content areas. As noted above, we will expect these individuals to have a terminal degree at the doctoral level or, in exceptional cases, to have a Master's degree with expertise, training and advanced knowledge in a particular content area. We anticipate needing and are budgeting for 0.3 FTE of Affiliate Faculty time.

**Admissions Coordinator**
Alexia Rebne, MS-OT, OTR; Part-time Student Services Coordinator; Currently 33.3% for MS-OT Program; budgeted for additional 25% for the OTD Program)

6. **Resource and Fiscal Considerations**

   a. **Overview of funding source and resource needs**

   We propose use of the non-pooled (Fund 131) mechanism for fiscal management of the program. We will be recruiting licensed occupational therapists for part-time, online learning and, thus, the OTD Program meets the criteria of net new enrollment at the UW-Madison. Initial development of the proposal was funded through an Educational Innovations grant. The Division of Continuing Studies is providing support for program development.

   A School of Education strategic initiative is to “develop instructional and research programs to respond to interest in the link between human health and educational outcomes.” The development of health-related instructional programs such as the OTD, is a high priority for the School. The School of Education has committed resources to assisting the Department of Kinesiology in its efforts to initiate the program.

   A 5-year budget including the estimated tuition revenue and program cost for start-up is provided in Appendix H. The following is a brief fiscal summary of the expected budget for Year 5, at which point the OTD Program is expected to be in full operation:

   Planned enrollment: 20 students admitted per cohort (with an estimated 10% attrition);  
   Year 5 enrollment = 54 students
Tuition mechanism: Non-pooled, Tier 2 at $1150 per credit

Estimate of paid tuition: $685,630

Core Instructional Costs: $253,970

Direct Student Support Costs: $65,700

Overhead assessment/allocation: $137,126 (@20% in Year 5)

Total Costs: $496,796

Excess Tuition available for re-investment: $228,834

Planned reinvestment uses: 1/3 of the excess tuition will be allocated to the School of Education Dean. The remaining $152,554 will support enhancement of student support and instructional activities in the Department of Kinesiology including, but not limited to:

- Student scholarship funds
- Student travel awards for visits to campus and professional presentations
- Capstone project awards for expenses related to implementation
- Technology and software upgrades to ensure state of the art course delivery
- Faculty support for instructional development
- Enhancement of course offerings through hiring or providing honoraria to instructors with specialized content knowledge and expertise

DCS is committed to providing support for the first three years of program operation in the form of instructional design, technology integration, and development of a marketing plan. Appendix B includes Memoranda of Understanding signed by appropriate parties which outlines the agreement between DCS and the OTD Program for program development. The Supplies & Expenses budget includes substantial funds for program marketing early in the program and increased technology support beginning in Year 4. We have also modestly budgeted housing expenses for students during the two required visits to campus. The budget also includes expenses related to OTD student enrollment in the EPD Interdisciplinary Professional Literacy Courses. A Memorandum of Understanding (Appendix B) has been signed between EPD and the Department of Kinesiology clarifying the allocation of tuition revenue for provision these courses (50% to EPD, 25% to DCS, 25% to Department of Kinesiology).

b. Impact on current and new staffing

We have budgeted sufficient funds to cover teaching in the OTD Program with either current or adjunct faculty. We anticipate some graduate faculty teaching responsibilities will shift from the MS-OT to the OTD Program. To compensate, we have budgeted sufficient resources in order to hire additional adjunct faculty or academic staff FTE, who meet the specified qualifications (see above), to teach MS-OT course content.
The budget includes additional personnel expenses for the hiring of Teaching Assistant support, 25% for an Admissions/Student Services Coordinator and 25% for OTD Program Coordinator and 5% for OT Program Faculty Director. The cost estimates are based on salary plus fringe benefit costs for current faculty and instructional staff teaching in the program. A 2% salary adjustment is built into the costs for the second and each subsequent year of the program.

The budget and teaching responsibilities will be closely monitored over the initial years of the OTD program to determine the impact on Departmental resources, particularly with regard to staffing. We will report the fiscal status of the program to the Kinesiology Department Executive Committee annually.

c. Student funding

As noted above, we will support enrolled students through need and merit-based scholarships.

Program Review Process

d. Timeline for program review

The OTD Program will engage in ongoing internal review through a structured assessment and review process (see Appendix F). The program will complete a 3 year progress report questionnaire per GFEC requirements. In keeping with the UAPC and Board of Regents policy, the new OTD program will undergo a five-year review initially, and be scheduled for ten-year reviews subsequently. The initial program review is estimated to occur in AY 2021-2022.

e. Evaluation plan

Appendix F outlines the proposed evaluation methods for the OTD Program. They are in line with the program evaluation activities currently in place for our MS-OT program so we anticipate a relatively seamless implementation.

f. Consideration of diversity, equity and climate: The following strategies will be used to monitor our progress on creating an inclusive and welcoming program environment:

- Tracking demographics of applicants, students, and faculty
- The annual program satisfaction questionnaire of current students will include items addressing diversity, equity and climate issues. We will include questions related to barriers to success in the program.
- As part of the admissions process, we will request that students choosing not to enroll identify any barriers to enrollment.
- As the UW-Madison 2014 Diversity Framework evolves, we will incorporate recommendations into the curriculum and our program activities.

g. External accreditation - not applicable

7. See Appendix I for Letters of Support from:
a. Gary Weismer, Ph.D., Oros Bascom Professor and Chair, Department of Communicative Sciences and Disorders

b. Lisa Steinkamp, PT, MS, MBA, Director, Doctor of Physical Therapy Program, Department of Orthopedics and Rehabilitation

c. Lawrence M. Berger, Professor and Doctoral Director, School of Social Work, Faculty Affiliate, Institute for Research on Poverty

d. Thomas Oliver, PhD, MHA, Professor of Population Health Sciences, Director, UW Master of Public Health Program (email of intent)
Demand for an Online Occupational Therapy Doctorate (OTD)

Custom Analysis

Continuing and Professional Education
Learning Collaborative

EDUVENTURES®
Research and Consulting for Higher Education
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The Inquiring Member Is Investigating the Feasibility of Offering an Online Clinical Occupational Therapy Doctorate (OTD)

Thus, CPE-LC staff conducted a primary survey of professionals in the OT field to ascertain the level of demand for the proposed OTD

- CPE-LC staff conducted a Web-based survey of individuals currently employed as occupational therapists, or who are interested in re-entering the occupational therapy field, and/or are studying to become an occupational therapist
  - The survey probed respondents' level of interest in enrolling in an online OTD, curriculum preferences within an online OTD as well as prospective students' demographic and professional backgrounds

- The following key questions were addressed in this research study:
  - What is the interest level among current licensed practicing occupational therapists for an online OTD?
  - What are prospective students' curriculum preferences within an online OTD?
  - What are prospective students' demographic and professional backgrounds?

The Web-based primary survey was launched to a list of 2,281 e-mail addresses provided by the inquiring member. A total of 378 completed responses were collected for a response rate of nearly 17%. Of the 350 respondents with a qualifying educational background, 193 (55%) reported interest in enrolling in an online OTD in the future.
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The Inquiring Member Has an Opportunity to Be an Early Entrant to the Online OTD Market and Also Attract an Out-of-State Audience

- **Demand exists for an online OTD program** – Over half of survey respondents (n=193) are likely to consider enrolling in an online OTD at the inquiring member in the future. Lack of time and interest, cost, and that the OTD is not a requirement for work are the key reasons why respondents are not likely to enroll in an OTD.

- **Prospects have demographic differences from respondents not likely to enroll** – Prospective students are younger, less likely to be the inquiring member’s alumni, have fewer years of experience as a practicing OT, and work within rehabilitation, aging, and health and wellness than respondents not likely to enroll. The inquiring member can develop targeted marketing and communications based on this prospective student profile.

- **Nearly half of the target audience live out-of-state** – 45% of prospects live outside the state. Enrolling out-of-state students will assist the development of a more national brand for the university in OT. Additionally, since few online OTD programs are in the market currently, the university has a prime opportunity to be an early entrant and capture a large market share.
Executive Summary and Recommendations

Marketing Messaging Should Speak to Student Motivations and Goals for Enrolling and Aligning OTD Curriculum and Structure With Student Preferences Will Be Key to the OTD Program’s Success

- **Key motivators and contributors to enrolling are aligned with the inquiring member’s original hypothesis** – The largest share of prospects reported to advance in clinical practice, seek personal enrichment, and enhance career options as primary goals for obtaining an OTD. Approximately 50% of prospects also reported to be respected and able to compete with other doctorate-prepared healthcare professionals. Self development/fulfillment, value of a practice-based OTD, and competing with other doctorate-prepared professionals were contributors to enrolling among 50% or more of prospects.

- **Concentrations and/or a general curriculum tailored to students’ needs are in more demand than public health programming** – The overwhelming majority of prospects (94%-96%) reported interest in concentration areas and/or curriculum designed to their needs. Even so, about half of prospects do have some interest in a course, certificate, and/or master’s in public health. Thus, the university may want to consider offering public health as a concentration or track within the OTD prior to offering a more in-depth public health component, such as a graduate certificate or full master’s degree.
Executive Summary and Recommendations

The Inquiring Member Should Address Potential Barriers to Study in Marketing and Communication Efforts and Also Ensure Effective Differentiation From Potential Competitors

- Not surprisingly, duration of on-campus components and willingness to travel and price per credit and willingness to spend are inversely related – The inquiring member should consider these preferences as well as the on-campus requirements and price points of similar OTD programs. Prior CPE-LC research analyzing 17 existing providers of OTD programs revealed that the average per credit hour charge is $641 for hybrid programs and $888 for 100% online programs. The inquiring member should be mindful of these price points to develop a competitive pricing strategy, yet not under or over price itself in the market.

- Cost, study time, and time needed to complete the degree are potential barriers – These are similar barriers as respondents’ reasons for not enrolling in an OTD. Technology (broadband Internet, online class logistics, prior online experience, etc.) did not represent much of a barrier at all to prospects. The inquiring member should seek to address these potential barriers in marketing and messaging the OTD.

- Competition appears minimal – Prospects planning to enroll within 12 months are more likely to report Boston University, University of St. Augustine, and NYU as schools considered/will consider while prospects planning to enroll in more than 12 months are likely to report that they haven’t considered any of the schools listed. The inquiring member should ensure that it benchmarks its OTD program against these programs and develops an effective differentiation strategy. In addition, since many longer-term prospects have not considered schools yet, the university has ample time to reach this audience.
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92% of the Total Sample Qualified to Complete the Survey

- Of the 378 total respondents, the majority (85%, n=321) are currently practicing as occupational therapists
  - 16 respondents (4%) are currently practicing and also enrolled in an advanced master's OT program
  - 1 respondent (.3%) is not currently practicing but enrolled in an undergraduate pre-OT track program
  - 12 respondents (3%) are not currently practicing but are considering re-entry into the OT field
    - Of these 12 respondents, 11 reported that they are interested or very interested in enrolling in an online continuing education program that would refresh and update their knowledge and skills in preparation for re-entry at the inquiring member in the future
- There were 28 respondents that did not qualify to complete the survey because they are not considering re-entry into the OT field, currently enrolled in a doctoral OT program, or they are an occupational therapy assistant
Key Characteristics of Prospective OTD Students

Of the 350 Qualified Respondents, Over Half (55%) Are Likely to Consider Enrolling in an OTD at the Inquiring Member in the Future

Level of educational attainment does not appear to impact likelihood of enrolling

There does not appear to be a specific pattern relating likelihood of enrolling to educational attainment level. For example, roughly equivalent percentages of respondents who are likely hold a bachelor's degree as respondents who are unlikely to enroll. However, not surprisingly, respondents who are unlikely are more likely to hold a doctorate degree already.

These 193 respondents that reported they are very likely or likely to consider enrolling in an online OTD at the inquiring member are defined as prospective students throughout the remainder of this study.
Key Characteristics of Prospective OTD Students

Among the 45% of Respondents That Are Not Likely to Enroll in an Online OTD, Lack of Interest, Time, and Cost Are Key Reasons

Reasons Respondents Do Not Anticipate Enrolling in an Online OTD in the Future (n=157)

- Not interested in obtaining a doctorate degree: 41%
- I don't have the time to devote to studying: 38%
- Other, please specify: 35%
- Too expensive/I cannot afford it: 34%
- It is not required for my work: 29%
- My employer does not provide tuition reimbursement for a doctorate degree: 19%
- Not interested in online education: 9%
- My employer does not provide tuition reimbursement for an online degree: 6%
- I would prefer a face-to-face/classroom-based OTD: 6%

The inquiring member should consider the reasons why respondents are not likely to enroll in an online OTD and combat some of these issues and challenges in communication and marketing efforts.
Key Characteristics of Prospective OTD Students

Prospective OTD Students Are Younger and Less Likely to Be Alumni Than Respondents Not Likely to Enroll

- Current affiliation to the inquiring member
  - The overwhelming majority of prospective students and respondents not likely to enroll are not currently enrolled at the inquiring member (98%-99%)

- Past affiliation to the inquiring member *
  - 51% of prospective students and 41% of respondents not likely to enroll have no alumni affiliation
  - 23% of prospective students and 42% of respondents not likely to enroll are undergraduate alumnus/a
  - 11% of prospective students and 13% of respondents not likely to enroll are graduate alumnus/a

- Place of residence
  - Slightly over half of both groups reside in-state (55% of prospective students and 53% of respondents not likely to enroll)
    - 45% of prospective students live outside the state

- Age
  - The average age of prospective students is 40 and the average age of respondents not likely to enroll is 43

* Statistically significant between these two groups at a P value of <.05
Prospective Students Tend to Have Fewer Years of Experience and Work Within Rehabilitation, Aging, and Health and Wellness Than Respondents Not Likely to Enroll

- Prospects have less experience as a practicing occupational therapist
  - 16% of prospective students have less than 5 years versus 12% of respondents not likely to enroll
  - 21% of prospective students have 5 to 10 years versus 20% of respondents not likely to enroll
  - 62% of prospective students have 10+ years versus 68% of respondents not likely to enroll

Area(s) of Clinical Expertise or Interest Within Occupational Therapy by Likelihood of Enrolling*

- Rehabilitation, Disability, and Participation: 63% Likely, 56% Not Likely
- Children and Youth: 47% Likely, 42% Not Likely
- Productive Aging: 26% Likely, 14% Not Likely
- Other, please specify: 19% Likely, 18% Not Likely
- Health and Wellness: 21% Likely, 12% Not Likely
- Mental Health: 10% Likely, 10% Not Likely
- Work and Industry: 8% Likely, 1% Not Likely
- Not applicable; I'm currently a student: 2% Likely, 1% Not Likely

The inquiring member can develop targeted marketing and communications outreach based on the demographic profile of prospective OTD students.

* Statistically significant between these two groups at a P value of <.05
Key Characteristics of Prospective OTD Students

Some Statistically Significant Differences Exist in Near-Term Versus Longer-Term Prospects

- Prospective students were segmented based on whether they are near-term or longer-term prospects to the inquiring member
  - Near-term is defined as planning to actually enroll within 12 months or less (n=70) and longer-term is defined as planning to actually enroll in more than 12 months (n=122)
- Statistically significant differences exist between these two student groups with regard to area of focus, schools considered, and contributors and barriers to enrolling
  - Near-term prospects are more likely to report Boston University, University of St. Augustine, New York University, Rocky Mountain University of Health Professions, and University of Illinois at Chicago as schools considered
    - Longer-term prospects are more likely to report Nova Southeastern University and and none of the above (21% versus 13% of near-term prospects)
  - Near-term prospects are more likely to report Rehabilitation, Disability, and Participation, Productive Aging, and Work and Industry as areas of clinical expertise or interest
    - Longer-term prospects are more likely to report Children and Youth
  - Near-term prospects are more likely to report that the occupational therapy field transitioning to an entry-level doctorate in the future was a key contributor to their decision to consider enrolling in an OTD
    - Longer-term prospects are more likely to report that an online OTD is not eligible for my employer’s tuition reimbursement plan as a key barrier to consider enrolling in an OTD
- Interestingly, no statistically significant differences exist between the two student groups with regard to years of experience, level of educational attainment, primary goals for enrolling, interest in MPH and other elements to curriculum, and information sources used
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Motivations for Enrolling in an OTD

To Advance in Clinical Practice and Attain Master Clinician Credential, Seek Personal Enrichment, and Enhance Career Options Are the Top Three Motivators Among Prospective Students

Primary Goals for Obtaining an OTD (n=193)

- To advance in my clinical practice and attain master clinician credentials: 71%
- To seek personal enrichment: 68%
- To enhance my career options by becoming proficient in teaching and communication skills: 66%
- To be respected and able to compete with other doctorate-prepared healthcare professionals: 50%
- To gain proficiency in the use of evidence to inform practice and engage in clinical research: 49%
- To gain professional leadership skills to advance at work: 48%
- To gain professional leadership skills to contribute to the profession at the state, national, or international level: 36%
- To gain professional leadership skills to develop community services: 34%
- To gain professional leadership skills to advocate for health care policy improvements: 28%
- To acquire competency in grant writing skills and obtain funding: 24%

These goals for obtaining an OTD are aligned with the inquiring member’s original hypothesis regarding drivers for entering the OTD market.
Motivations for Enrolling in an OTD

The Self-Development/Fulfillment Aspect to Obtaining a Doctorate Degree Was an Contributor to 95% of Prospective Students
Value of a practice-oriented OTD and competing with other doctorate-prepared professionals were also key contributors for over half of prospective students

Level of Contribution in Decision to Consider Enrolling in an OTD Program (n=193)*

- **Self-development/self-fulfillment aspect to obtaining a doctorate degree**
  - Contributed: 95%
  - Neutral: 4%
  - Did not contribute: 1%

- **Value of a practice-oriented OTD over a research-based Ph.D.**
  - Contributed: 74%
  - Neutral: 17%
  - Did not contribute: 9%

- **Competition with other doctorate-prepared professionals (e.g. physical therapists) for supervisory and managerial positions**
  - Contributed: 53%
  - Neutral: 25%
  - Did not contribute: 22%

- **The occupational therapy field may transition to an entry-level doctorate in the future**
  - Contributed: 44%
  - Neutral: 30%
  - Did not contribute: 26%

*Strongly contributed/contributed and did not contribute/did not at all contribute were combined in this analysis*
Motivations for Enrolling in an OTD

Cost, Amount of Study Time, and Amount of Time to Complete the Degree Are Key Barriers Perceived to Enrolling in an Online OTD by Over 60% of Prospective Students

The majority of prospects did not find any of the other areas as potential barriers to enrolling

Potential Future Barriers to Enrolling in an Online OTD Program (n=193)*

*Significant barrier/somewhat of a barrier and not a significant barrier/not at all a barrier were combined in this analysis
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Nearly a Third of Prospective Students Anticipate Enrolling in an Online OTD Within 6-12 Months and Students’ Willingness to Travel Trends Upwards as Frequency of On-Campus Components Decreases

Anticipated Time Before Actually Enrolling in an Online OTD Program (n=193)

Willingness to Travel to the Inquiring Member for an On-Campus Component at the Culmination of an Online OTD Program (n=193)

The inquiring member should review these preferences as well as the on-campus components of the other hybrid OTD programs identified in the first research report when deciding on the structure and frequency of its on-campus meetings.

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Concentrations or Tracks and a General Curriculum Tailored to Student Needs Within an OTD Program Are of Greater Interest to More Prospective Students Than Public Health Curriculum

Level of Interest for Curriculum as Part of an Online OTD Program (n=193)*

- An OTD program offering concentrations or tracks in several areas: 96% interested, 3% neutral, 1% not interested
- An OTD program incorporating a general curriculum that is tailored to your individual needs/interest areas: 94% interested, 5% neutral, 1% not interested
- Individual courses in Public Health: 51% interested, 34% neutral, 15% not interested
- Certificate of Public Health: 52% interested, 27% neutral, 21% not interested

56% of prospects (n=108) reported that they are also interested in completing a Master of Public Health degree as part of the online OTD program.

The inquiring member may want to consider a concentration or track in public health prior to offering a full graduate certificate or master’s degree.

*Very interested/interested and not interested/not at all interested were combined in this analysis.
Programmatic Preferences for an OTD

Not Surprisingly, Price and Willingness to Spend Are Inversely Related – As the Per Credit Hour Charge Trends Downwards, Prospective Students’ Willingness to Spend Increases

Willingness to Spend Per Credit for an Online OTD Program (N=192)

The inquiring member should review the price points of the existing online and hybrid OTD programs identified in the first research report to ensure a competitive pricing strategy. The average per credit hour charge is $641 for hybrid programs and $888 for 100% online programs.
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Professional Associations and Conferences and a School's Web Site Are the Most Commonly Used Information Sources Among Prospects

<table>
<thead>
<tr>
<th>Percent of Prospects</th>
<th>Information Sources and Marketing Channels Used to Learn About Occupational Therapy Education and Schools Offering the OTD</th>
</tr>
</thead>
</table>
| Over 50%             | • American Occupational Therapy Association  
                       • College or university’s own Web site  
                       • OT Practice  
                       • Advance for Occupational Therapists  
                       • Professional conferences (e.g., AOTA, state OT associations) |
| Between 30% and 50%  | • Informational materials from the college (e.g., brochures, course catalogs)  
                       • Articles in the press/media |
| Between 10% and 30%  | • Published rankings of schools/programs (e.g., U.S. News)  
                       • State Occupational Therapy Association  
                       • Inquiring member alumni  
                       • American Occupational Therapy Foundation  
                       • Web directories of college programs  
                       • Online blog postings |
| Less than 10%        | • Social networking sites (e.g., Facebook, MySpace, LinkedIn)  
                       • Inquiring member current student |

The inquiring member ensure that its program Web site contains up-to-date information and that it utilizes OT-related professional associations to communicate the proposed OTD program.
Key Information Sources and Potential Competitors

Competition Appears Quite Minimal – Boston University and University of St. Augustine Rose to the Top of the List, But With Only 38% of Prospects Reporting That They Have Considered or Would Consider These Two Schools

<table>
<thead>
<tr>
<th>Percent of Prospects</th>
<th>Universities or Colleges Respondents Have Considered/Would Consider Enrolling in for a Post-Professional OTD Program</th>
</tr>
</thead>
</table>
| Between 30% and 40%  | • Boston University  
                      | • University of St. Augustine                                                                                     |
| Between 20% and 30%  | • Nova Southeastern University                                                                                     |
| Between 10% and 20%  | • Rocky Mountain University of Health Professions  
                      | • New York University  
                      | • University of Illinois at Chicago  
                      | • Creighton University  
                      | • Temple University  
                      | • Virginia Commonwealth University                                                                                     |
| Less than 10%        | • Tufts University  
                      | • University of Indianapolis  
                      | • Chatham University  
                      | • Misericordia University  
                      | • Thomas Jefferson University  
                      | • University of Kansas Med Center  
                      | • Loma Linda University  
                      | • Washington University at St. Louis                                                                                     |

17% of prospects reported none of the above
7 prospects reported the inquiring member only within the other, please specify option
5 respondents wrote-in that they have not started looking yet
Table of Contents

Background and Methodology

Executive Summary and Recommendations

Research Findings
• Key Characteristics of Prospective OTD Students
• Motivations for Enrolling in an OTD
• Programmatic Preferences of Prospective OTD Students
• Key Information Sources and Potential Competitors

Conclusion and Next Steps
Conclusion and Next Steps

There Is a Clear Opportunity for the Inquiring Member’s Online OTD Program; Continued Marketing and Outreach, Effective Differentiation, and Defining a Clear Value Proposition Are Important for Success

- **Continued marketing and outreach** – The inquiring member has an opportunity to enroll a large contingent of out-of-state students and non-alumni. This demonstrates the university’s potential to become a dominant national provider of online OTD programs. The inquiring member should ensure that it continues to effectively market and communicate the online OTD programs, particularly through OT-related professional associations. Ensuring that its program Web site contains timely and up-to-date information will also be key in effectively communicating the program to prospective students.

- **Effective differentiation** – While competition among online OTD programs is low, there are some other OTD programs that prospects may consider. Differentiation from these potential competitors will likely come from delivery modality, price points, and curriculum offerings. The inquiring member should review the results of the first research report on OTD programs to provide insight on differentiation strategies.

- **Defining a clear value proposition** – Student motivations and goals for enrolling in the OTD program are consistent with the university’s original hypothesis of the value of an OTD. These goals and aspirations should be emphasized in marketing materials. Prospective students should be able to clearly understand and articulate the benefit to them after completing the OTD.
Appendix: About the Survey

- Eduventures and the inquiring member worked in partnership to launch a Web-based survey to individuals currently employed as occupational therapists, or who are interested in re-entering the occupational therapy field, and/or are studying to become an occupational therapist.

- The advantage of a Web-based survey methodology is the ability to quickly reach a large audience to obtain the opinions of the desired target market. The survey was launched to a list of 2,281 e-mail addresses provided by the inquiring member. A total of 378 completed responses were collected for a response rate of nearly 17%. Of the 350 respondents with a qualifying educational background, 193 (55%) reported interest in enrolling in an online OTD in the future.

- The sample size of 378 provided a reasonable level of confidence for opinion questions. The margin of error is +/- 5.14% for this investigation at a 95% level of confidence, for questions in which opinion is split equally.

- Cross-tabulation analysis was undertaken on demographic questions between prospective OTD students and respondents not likely to enroll as well as near and longer-term prospects. Significant differences between survey results were noted throughout this report.
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- Market Analysis Process  Slide 3
- Objectives & Methodology  Slide 4
- Interview Summary  Slide 5
- Appendix  Slide 8
## New Program Market Analysis Process

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
</tr>
</thead>
</table>
| 1. Competitive Analysis | - What programs already exist?  
- How are they designed? |
| 2. Employment Projections | - What does the job market look like?  
- Is there projected growth in demand? |
| 3. Employer Interviews | - Are employers interested in sending employees or hiring graduates from the program?  
- What are the industry desired skill-sets? |
| 4. Prospective Student Interviews | - Understand student’s professional goals  
- Gather feedback on the proposed curriculum |
Objectives & Methodology

Objectives

- Understand prospective student’s professional goals and what they are looking to gain from an OTD program
- Gather feedback on the proposed curriculum
- Determine the optimal program format
- Understand the support needed for a prospective student to enroll

Methodology

- 10 phone interviews were conducted with alumni from December, 2013 – February 2014
- Limitation: Please note that the research was qualitative in nature using a small sample size and therefore data should be used directionally
Respondent Profiles

Years Since Graduation
• Ranging from 1-6 years

Plans for pursuing an OTD
• Yes: 3 (2 looking at OTD or PhD)
• Maybe: 6
• No: 1

Area of Expertise
• 6 in Pediatrics
• 2 in Acute Care
• 1 in Geriatrics
• 1 in Home Care

• The low number of respondent’s currently planning on pursuing an OTD could be due to age
• In the 2010 Eduventures study, the average age of students interested in pursuing an OTD was 40.

Wants/Likes

- Respondents are looking for flexibility in an OTD program and like the online format of the proposed UW program.
- They agree with incorporating a synchronous component and some on-campus time, however, the synchronous component should be only once a week and flexible if someone can’t make it.
- Other items prospective students are looking for are financial support and availability of mentors/advisors.
- When asked what they like about the proposed curriculum, respondents mentioned the inter-professional aspect the most (important for real-world work contexts).

Barriers/Dislikes

- The obstacle to enrolling that was mentioned most was cost which matches with the top barrier found in the Eduventures study.
- Some mentioned that the curriculum seemed broad and it was unclear if the program can be tailored to an individual's practice area or if you can pick an area to focus on.
- There was some question around what the jobs are when you have an OTD and that this should be made clear to prospective students.
UW-Madison resident tuition falls in the middle of online/blended OTD programs while non-resident tuition costs put UW-Madison in the top range.

*The following Universities offer reduced tuition for residents or alumni: Misericordia University, Temple University, University of Utah and Virginia Commonwealth.*
Appendix
Intro: Thanks for taking the time today to speak with us about a proposed Occupational Therapy Doctorate program at the University of Wisconsin – Madison. Your opinions will be extremely helpful as we explore and build the program.

1. Background: Please tell me about your current position. How many years has it been since you graduated with an occupational therapy degree? What is the highest degree you have earned (bachelors or masters)? If masters, in what (OT vs. other field)?

2. Are you currently thinking of pursuing an OTD or a PhD? Why or why not? *If interviewee is thinking of pursuing an OTD, probe on their professional goals and why they are looking to obtain an OTD*

3. *Ask only among those thinking of pursuing an OTD program.* What are some important characteristics you are looking for in an OTD program

4. *Ask only among those thinking of pursuing an OTD program.* Can you think of any potential obstacles that may prevent you from enrolling in an OTD program?
Program/Curriculum Opinions

Interviewer: Now I’d like to seek specific input on the proposed OTD program curriculum at UW-Madison. Specifically I’d like to understand what you liked about the curriculum and what you feel needs to be changed or is missing.

*Refer to program curriculum sent ahead of time for these questions*

5. What about the proposed UW-Madison OTD curriculum do you like, if anything?

6. What about the proposed curriculum would you change, if anything?

_Probe on anything missing we should add_

7. What are your thoughts and opinions about the UW-Madison OTD program being fully online (ask only if online hasn’t been mentioned)? If a requirement of the OTD program involved coming to campus for a few days for an orientation and for presentations of the Capstone project, would this be feasible for you?

8. What are your thoughts on having a synchronous component as part of the curriculum where all students are required to attend a scheduled session at the same time such as a weekly video chat?

9. Are you familiar with or have you looked at OTD programs from other institutions? If so, what are some aspects of those programs that stood out to you?

_Closing_

Thanks so much for your time today! Your input is valuable in helping UW-Madison develop the Occupational Therapy Doctorate program. Are there any other comments you wish to share before we end the interview?
<table>
<thead>
<tr>
<th>Institution</th>
<th>Public or Private?</th>
<th>Carnegie &quot;Very High Research Activity&quot;</th>
<th>Carnegie's highest category of community engagement</th>
<th>Online</th>
<th>Inter-professional Focus?</th>
<th>Concentration or Focus</th>
</tr>
</thead>
<tbody>
<tr>
<td>A.T. Still University of Health Sciences (AZ)</td>
<td>private</td>
<td>no</td>
<td>no</td>
<td>yes</td>
<td>yes</td>
<td>Program development and evaluation; Prevention and promotion of health and wellness.</td>
</tr>
<tr>
<td>Brenau University, Gainsville (GA)</td>
<td>private</td>
<td>no</td>
<td>no</td>
<td>yes</td>
<td>mildly</td>
<td>Advanced practice; Program development and entrepreneurship; Building evidence in practice; Teaching and learning</td>
</tr>
<tr>
<td>Concordia University (WI)</td>
<td>private, religious affiliation</td>
<td>no</td>
<td>no</td>
<td>yes</td>
<td>no</td>
<td>Upper extremity rehabilitation, Pediatrics, or Education</td>
</tr>
<tr>
<td>Creighton University (NE)</td>
<td>private, religious affiliation</td>
<td>no</td>
<td>no</td>
<td>yes</td>
<td>no</td>
<td>Leadership, ethics, policy, neuroplasticity, management, research and instructional methods</td>
</tr>
<tr>
<td>Eastern Kentucky University (KY)</td>
<td>public</td>
<td>no</td>
<td>yes</td>
<td>yes</td>
<td>no</td>
<td>Occupation-Based Practice, Diversity, Leadership, and Reasoning</td>
</tr>
<tr>
<td>Loma Linda University (CA)</td>
<td>private, religious affiliation</td>
<td>no</td>
<td>no</td>
<td>yes</td>
<td>no</td>
<td>Spirituality, diversity, critical reasoning, advocacy, participation, education, and research</td>
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<tr>
<td>Philadelphia University Philadelphia (PA)</td>
<td>private</td>
<td>no</td>
<td>no</td>
<td>yes</td>
<td>yes</td>
<td>Interprofessional Partnerships; Applied Leadership; Advanced Evidence-based Practice</td>
</tr>
<tr>
<td>Quinnipiac University (CT)</td>
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<td>no</td>
<td>no</td>
<td>yes</td>
<td>no</td>
<td>Children and Youth: Continuum of Participation; Environmental Adaptations; Adult Healthcare Continuum: Rehabilitation, Community and Wellness</td>
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<td>Rocky Mountain University of Health Professions (UT)</td>
<td>private</td>
<td>no</td>
<td>no</td>
<td>yes</td>
<td>no</td>
<td>Pediatric Science, Hand Therapy, Work and Health, Education, Aging, and Administration and Practice Management</td>
</tr>
<tr>
<td>Institution</td>
<td>Public or Private?</td>
<td>Carnegie &quot;Very High Research Activity&quot;</td>
<td>Carnegie's highest category of community engagement</td>
<td>Online</td>
<td>Inter-professional Focus?</td>
<td>Concentration or Focus</td>
</tr>
<tr>
<td>------------------------------------------------</td>
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<td>----------------------------------------</td>
<td>---------------------------------------------------</td>
<td>--------</td>
<td>--------------------------</td>
<td>----------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>St. Catherine University Minneapolis (MN)</td>
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<td>no</td>
<td>yes</td>
<td>no</td>
<td>no</td>
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<tr>
<td>Temple University Philadelphia (PA)</td>
<td>public</td>
<td>no</td>
<td>yes</td>
<td>yes</td>
<td>no</td>
<td>Leadership, Advocacy, Clinical Education, Evidence-based Practice, Community-based Occupational Therapy Leadership, Advocacy, Cl</td>
</tr>
<tr>
<td>Thomas Jefferson University (PA)</td>
<td>private</td>
<td>no</td>
<td>no</td>
<td>yes</td>
<td>no</td>
<td>Physical Dysfunction; Mental Health; Gerontology; Education; Administration; Research; Other: Sensory Integration</td>
</tr>
<tr>
<td>University of St. Augustine For Health Sciences (FL)</td>
<td>private</td>
<td>no</td>
<td>no</td>
<td>yes</td>
<td>yes</td>
<td>Neuroscience, Mental Health, Pediatrics, Gerontology, Orthopedics, Academia</td>
</tr>
<tr>
<td>Chatham University (PA)</td>
<td>private</td>
<td>no</td>
<td>no</td>
<td>yes</td>
<td>no</td>
<td>Evidenced-based practice</td>
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<tr>
<td>Boston University (MA)</td>
<td>private, nonsectarian</td>
<td>yes</td>
<td>no</td>
<td>yes</td>
<td>no</td>
<td>Critically evaluate theory and evidence; Identify gaps in current intervention methods and programs; Design innovative responses to fill unmet needs.</td>
</tr>
<tr>
<td>George Washington University Washington, D.C.</td>
<td>private</td>
<td>yes</td>
<td>no</td>
<td>yes</td>
<td>yes</td>
<td>Post-acute and chronic care; Translational science; Transdisciplinary practice; Quality</td>
</tr>
<tr>
<td>Institution</td>
<td>Public or Private?</td>
<td>Carnegie &quot;Very High Research Activity&quot;</td>
<td>Carnegie's highest category of community engagement</td>
<td>Online</td>
<td>Inter-professional Focus?</td>
<td>Concentration or Focus</td>
</tr>
<tr>
<td>------------------------------------------------</td>
<td>-------------------</td>
<td>----------------------------------------</td>
<td>---------------------------------------------------</td>
<td>--------</td>
<td>--------------------------</td>
<td>----------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>University of Kansas Medical Center Kansas City (KS)</td>
<td>public</td>
<td>yes</td>
<td>yes</td>
<td>yes</td>
<td>yes</td>
<td>Evidence Based Practice, Professional Leadership, Specialty Practice and Teaching</td>
</tr>
<tr>
<td>University of Utah (UT)</td>
<td>public</td>
<td>yes</td>
<td>yes</td>
<td>yes</td>
<td>no</td>
<td>Contemporary Trends in Practice with Children and Youth, Occupational Justice, Disability Studies, Excellence in Teaching, Program and Policy Development and Advocacy, and Optimal Aging</td>
</tr>
<tr>
<td>University of Wisconsin-Madison</td>
<td>public</td>
<td>yes</td>
<td>yes</td>
<td>yes</td>
<td>yes</td>
<td>Visionary leadership, Inter-professional education and practice, and Research translation</td>
</tr>
</tbody>
</table>
Appendix B: MOUs with DCS & EPD
Memo of Understanding for New Program Development
University of Wisconsin-Madison
Department of Kinesiology, School of Education
and
Division of Continuing Studies
05.20.15

Occupational Therapy Doctorate

Continuing Studies welcomes this opportunity to help support the Department of Kinesiology and the School of Education in developing an online Occupational Therapy Doctorate (OTD) designed for a nontraditional audience. The purpose of this document is to effectively communicate expectations that will lead us to achieve our desired shared outcomes. Success involves a number of stakeholders with varying roles, assumptions, expectations, and outcomes. It is in this spirit that we have prepared this document, and look forward to exceeding your expectations.

1. Program Personnel and Responsibilities

Coordination

The Department of Kinesiology (hereafter referred to as “the Department”) agrees to assign a Program Director to serve as the main contact person to coordinate development of this capstone/degree program, guide the program through academic approval, and facilitate the resolution of issues that may arise in the development and launching of this new program. The Program Director will:

- Coordinate communication between the department, participating faculty, the School of Education Deans Office, and campus administrative units to ensure policy and procedures are in place to facilitate the offering of this program to nontraditional students.
- Assist with marketing strategies
- Insure the department provides appropriate academic advising and student support services
- Facilitate and coordinate the course/program development and approval process
- Assist Continuing Studies’ Director of Online Development with the facilitation and development of the online courses.
- Develop a fiscally responsible program revenue operating budget, and guide that budget through the school/college approval process.

Student Services and Advising

The Department also agrees to assign a Student Services Coordinator and/or advisor, whose responsibility it will be to advise students in this new program.

Online Program and Course Development Staffing

The Department agrees to assign faculty and instructional staff as Content Experts to assist with development and provide instruction for all online courses. Continuing Studies will provide salary support for these Content Experts as specified in the Development Budget.

In addition to salary support for department faculty/staff, the campus Education Innovation fund will provide support in the form of Continuing Studies staff time and expertise for program and budget development, project management, instructional design, online course development, and faculty mentoring/training for online instruction.
Essential Personnel/Roles

- OTD Program Coordinator: Ruth Benedict
- Kinesiology Department Chair: Dorothy Farrar-Edwards
- OTD Student Services Coordinator:
- DCS Director of Online Development: Steven Boldt

2. Online Course Development

Online courses will be collaboratively planned, designed, developed, and assessed by the content providing faculty (Content Expert) and the Continuing Studies Educational Innovation online development unit.

DCS will provide basic online course development and production including:

- Instructional design with best practices, including incorporating accessibility
- Media development
- D2L course development
- Instructor training in online instruction, and up to 20 hours/course/semester instructor support
- Two course maintenance updates (2nd iteration after 1st semester taught and a 3rd iteration after the 2nd semester taught). At this point in time the course and all course related materials will be turned over to the department for upkeep and redesign OR a new maintenance MOU will be agreed upon
- The Department agrees that faculty participating in the online development will participate in training in online teaching and learning, consisting of two courses: TeachOnline@UW: Plan & Design and TeachOnline@UW: Facilitation & Management.
- Program development started in February 2015; the program has started the academic governance process, and has the support of the Department and the School of Education Deans Office. Anticipated first enrollments in fall 2016.
- In collaboration with Continuing Studies, the department/school will develop, assess, and revise a total of eight courses; six three credit, two two credit courses for online delivery. This represents approximately 4120 hours of development time by DCS instructional design staff.
- Online course development will begin spring 2015 and will be completed by fall 2016. The sequence and timeline of course design, development, and offering are delineated in the Development Plan below.
  - Preliminary syllabi for each of the courses are to be submitted to Continuing Studies prior to course development.

<table>
<thead>
<tr>
<th>Course Number</th>
<th>Faculty</th>
<th>Live Term</th>
<th>Production Phase (Credit):(Hours)</th>
<th>Development Start/End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>KINES 785</td>
<td>Larson</td>
<td>Fall 2016</td>
<td>2 credit: 250 Hours</td>
<td>Summer 2015 / Fall 2015</td>
</tr>
<tr>
<td>Occ Ther 811</td>
<td>Affiliate</td>
<td>Fall 2016</td>
<td>3 Credit: 350 Hours</td>
<td>Summer 2015 / Fall 2015</td>
</tr>
<tr>
<td>Occ Ther 812</td>
<td>Gartland</td>
<td>Fall 2016</td>
<td>3 Credit: 350 Hours</td>
<td>Fall 2015 / Spring 2016</td>
</tr>
<tr>
<td>Occ Ther 813</td>
<td>Bebeau</td>
<td>Spring 2017</td>
<td>3 Credit: 350 Hours</td>
<td>Fall 2015 / Spring 2016</td>
</tr>
<tr>
<td>Occ Ther 871</td>
<td>Ausderau</td>
<td>Fall 2017</td>
<td>2 credit: 250 Hours</td>
<td>Spring 2016/Summer 2016</td>
</tr>
<tr>
<td>Occ Ther 872</td>
<td>Travers</td>
<td>Spring 2018</td>
<td>3 Credit: 350 Hours</td>
<td>Spring 2016/Summer 2016</td>
</tr>
<tr>
<td>Occ Ther 814</td>
<td>Affiliate</td>
<td>Summer 2018</td>
<td>3 Credit: 350 Hours</td>
<td>Summer 2016 / Fall 2016</td>
</tr>
<tr>
<td>Occ Ther 873</td>
<td>Pickett</td>
<td>Fall 2018</td>
<td>3 Credit: 350 Hours</td>
<td>Summer 2016 / Fall 2016</td>
</tr>
</tbody>
</table>
• The Development Plan outlines the timelines and deliverables for online course development. By accepting funding, the Department, the Program Coordinator, and the Content Experts agree to adhere to the delivery timelines. Failure to adhere to these development timelines may result in funding being withdrawn.

• All online courses making up the OTD program will be aligned with outcome-based learning and will undergo standard academic approval processes of UW-Madison. All online courses in the proposed program will be developed using the best practices framework for instructional design for distance education courses and programs, aligned with Quality Matters national standards for distance education courses and programs, employing the Learn@UW (D2L) course management system.

• The Content Experts, under the guidance of the appointed Program Coordinator, will engage in continued collaboration with Continuing Studies from project inception to insure course completion and approval at least 4 weeks prior to the initial term start. Courses will be reviewed by designee(s) from the Department and Continuing Studies upon completion and approval prior to initial course offering.

• If the course is not complete in Learn@UW and ready to be taught at least 4 weeks prior to the start of initial term, the Director of Online Learning will consult with the Department Chair concerning advisability of course cancellation, as well as review and possible cancellation of the remaining development obligations.

• Continuing Studies will provide (at no project cost) basic course development and production including: instructional design with best practices covering accessibility and copyright, project management, media development, D2L course development, training, and on-going instructor support.

### 3. Use of Course and Materials

• The Content Experts will have control of and responsibility for the substantive and intellectual content of materials subject to review and approval of the Department/College. Content Experts shall receive credit as a named author or a principal developer of the course. The Department/College may add additional authors in accordance with their contribution to the course and as determined by the Content Experts. Content Experts have the right to remove their name from the course at any time, in coordination with the academic department and Continuing Studies. The Department can appoint others to teach the courses.

• All online courses developed using Educational Innovation and/or DCS funding are designed to be re-usable, and student focused. This means that courses are designed to make it possible to be taught by multiple instructors. Content Experts assisting with initial online course development agree that course content is being developed for the program, and that the Department can appoint others to teach the courses.

• The University of Wisconsin – Madison complies with U.S. copyright law and its amendments (Title 17 of the U.S. Code). Copyrighted materials may be reproduced under certain conditions defined as “fair use.” Otherwise, reproduction requires permission of the copyright holder. It is the responsibility of the faculty/staff member or student using the material to determine if the “fair use” privilege applies. If it does not, it is their responsibility to request written permission for reproduction from the copyright holder.

• It is the policy of the UW-Madison to disclaim copyrights to the Works produced by its employees created during the course of their employment except as stated in General Administrative Policy and Procedure Paper #27 (hereinafter GAPP 27). The parties agree that an exception, substantial university support, applies to the development of this program and the individual courses comprising the program, and the UW-Madison claims a copyright interest in the work.
• Consistent with the rules of the UW Board of Regents, the Board owns the course and materials and UW-Madison shall have the exclusive right to offer the course, whether through internet, video transmission, IP Video, interactive TV, or by other means, to any student at any location.

4. Ongoing Program Delivery
• Once the courses comprising the program have been developed and been approved through the academic approval process, the responsibility for delivering the program becomes a departmental and school/colleges responsibility. The department/school/college is responsible for all course and instructional scheduling and staffing, student advising and recruiting, and budgeting.
• This program will be supported using a program revenue model for its ongoing delivery.

5. Marketing Support
DCS agrees to provide:
• Marketing plan (including but not limited to audit and assessment of current tactics, measureable objectives, creative brief, and tactical timeline)
• Webpage on UW-Madison Advance Your Career portal
• Limited production support (may include email deployment, web design, and print production)

Department agrees to
• Make personnel available to answer marketing questions, attend marketing meetings and review the marketing plan and tactics. Depending on the program, personnel may include the program manager, faculty, and/or support staff.
• Review and approve each marketing tactic within 5 business days
• Provide lists of internal and owned audiences for marketing purposes
• Follow up on all leads within 1 business day and make key personnel available to communicate and meet with prospective students.

6. Funding Agreement Terms
The funding agreements in this document are contingent upon completion of course/program development and offering as described above, and summarized in the Course Development Plan. Changes to the agreements, timetables or funding will be based on written agreement between the College and Continuing Studies designees. The funding agreements are subject to renegotiation and possible withdrawal if course development and delivery do not proceed according to the accepted Course Development Plan. Similarly, development funding will be withdrawn if the program is not approved through the academic approval process.

Total Funding = $97,316 over two fiscal years (FY16 & FY17)
UDDS: A-17-6000
FY16: Salary $36,458; Fringe $12,200; S&E $0; TOTAL $48,295
FY17: Salary $36,458; Fringe $12,200; S&E $0; TOTAL $48,295
• DCS agrees to fund $52,916 in salary and fringe to support this project of which $72,916 will be transferred as salary ($26,458 in FY16 and $26,458 in FY17). The funding transferred will be 101 funds. DCS will pay into the campus fringe pool the accompanying fringe costs for the salary funds ($24,400) for a total investment of $97,316.
• Funding for this project will be provided via a fund 101 budget transfer. The Department will set up a dedicated 101 project account to track the expenses related
to the development of this program. At the end of the project, unspent funds will revert back to the Division of Continuing Studies.

- Funds will be transferred in a lump sum to the departmental UDDS; Continuing Studies will assume no direct payroll responsibilities
- Unspent salary funds will rollover as S&E funds. Therefore it is important that you request only those salary funds that you can spend in a given fiscal year.
- See the OTD Development Budget for budget detail
- Once the OTD program is launched, it is the responsibility of the Department to generate sufficient tuition program revenue to support the program. DCS funding is not available to support ongoing expenses of the program.

DCS In-Kind Staffing

In addition to this salary support for department faculty/staff, the campus Education Innovation fund will provide support in the form of Continuing Studies staff time and expertise for program and budget development, project management, instructional design, online course development, and faculty mentoring/training, market analysis, and marketing strategy. This in-kind staffing is not unlimited. The Project Manager will coordinate with the Program Director appropriate staffing.

Signatures below indicate understanding and acceptance of these terms and conditions.

[Signatures]

Julie Underwood, Dean
School of Education

Date

Melissa Amos-Landgraf, Budget Officer
School of Education

Date

Dorothy Farrar-Edwards, Chair
Department of Kinesiology

Date

Jeff Russell, Dean
Continuing Studies

Date

Laura Ingram, Associate Dean
Continuing Studies

Date
Memorandum of Agreement (MOA) between the Department of Engineering Professional Development and the Occupational Therapy Doctorate program (Course Suite User Agreement)

I. Purpose of the Agreement

This agreement between the Department of Engineering Professional Development (EPD) and the Department of Kinesiology formalizes a system for non-pool graduate programs offered through Doctor of Occupational Therapy (OTD) Program to participate in courses within the Professional Literacies Course Suite. The Suite provides unique graduate education via 8 week, 1-credit, online, interdisciplinary courses. This agreement clarifies the academic and financial implications for all parties.

II. Description of Roles and Responsibilities

The Professional Literacies Suite is designed in such a way that non-pool degree programs can include one or more Suite courses in their approved degree curriculum. EPD is the academic home for all Suite courses and the degree program’s sponsoring department is the academic home for the degree program.

EPD will provide:

- Course administration
- Course design and development
- Course approval attainment
- Course instructional design and technical support
- Instruction
- Course evaluation and continuous improvement
- Liaison to degree program administration

Degree program will provide:

- Student services
- Degree program administration
- Liaison to EPD administration
- Enrollment estimates (using Attachment 1: Professional Literacies Course Suite Enrollment Estimate Worksheet)

III. Schedule of Agreement

EPD and the OTD Program will develop a schedule of course offerings that accommodate the needs of OTD students. In turn, the OTD Program will provide enrollment estimates so that EPD can optimize schedule and enrollment objectives.
Future offerings of specific courses will be negotiated and scheduled annually depending on program needs.

IV. Financial Agreement

The Division of Continuing Studies (DCS) has adopted a revenue sharing model for departments participating in Professional Literacies courses. The DCS model is broken up into four elements, including: program administration, course support, instructional support, and new program development. The structure for the financial model employed by the Professional Literacies Course Suite is as follows:

- 25% of Professional Literacies Course tuition recovered from OTD students will be maintained by Department of Kinesiology OTD Program to fund program administration.
- 25% of Professional Literacies Course tuition recovered from the students from OTD will be allocated to the DCS to fund future program development and educational technologies.
- 50% of Professional Literacies Course tuition recovered from the students from OTD will be allocated to EPD to fund:
  - Course development & revisions
  - Course Suite administration
  - Instructional systems design
  - Instruction
  - Technical support (development and instruction)
  - TA support (enrollment minimum required)

The funds transfers will be managed by DCS accounting services, and coordinated with Department of Kinesiology and EPD. The initiation of each transfer should begin in Week 12 of each term.

IV. Duration of Agreement

This agreement will remain in effect until terminated by either party, or upon recommendation of the Division of Continuing Studies.
IV. Signatures

By signing below, Occupational Therapy agrees to the terms and conditions of this Memorandum of Agreement.

Chair, Engineering Professional Development, Date

Chair, Department of Kinesiology, Date

Program Director, Engineering Professional Development, Date

Program Director, Occupational Therapy, Date

July 22, 2015
Attachment 1

Professional Literacies Course Suite Enrollment Estimate Worksheet

All courses listed below will be scheduled as 1-credit, 8 week, online interdisciplinary offerings. Anticipated student enrollment will inform frequency of offerings and schedule of terms.

<table>
<thead>
<tr>
<th>Professional Literacies Course</th>
<th>Program Indicated Interest</th>
<th>Anticipated No. of Students/Term</th>
<th>Anticipated First Term of Enrollment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Managing Change</td>
<td></td>
<td></td>
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<tr>
<td>Leading Teams</td>
<td></td>
<td></td>
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<tr>
<td>Effective Professional Communication: Oral</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Effective Professional Communication: Written</td>
<td>Yes</td>
<td>10-15</td>
<td>Summer 2016</td>
</tr>
<tr>
<td>Managing Information</td>
<td>Yes</td>
<td>10-15</td>
<td>Summer 2016</td>
</tr>
<tr>
<td>Creating Breakthrough Innovations</td>
<td></td>
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<td></td>
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<tr>
<td>Effective Negotiation Principles and Strategies</td>
<td></td>
<td></td>
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<tr>
<td>Key Legal Concepts for Technical Professionals</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Digital Proficiency</td>
<td>Yes</td>
<td>10-15</td>
<td>Summer 2016</td>
</tr>
<tr>
<td>Project Management</td>
<td></td>
<td></td>
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<tr>
<td>Business and Financial Acumen</td>
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<tr>
<td>Sales and Marketing Strategy</td>
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<tr>
<td>Professional Ethics</td>
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<td></td>
<td></td>
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</tbody>
</table>
Appendix C: Draft syllabi
Course Syllabus
Kines 785
Human Occupation & Health
Fall 1
2-3 credits

I. Course Instructor:
Elizabeth Larson, Ph.D., Associate Professor, Occupational Therapy Program
608-262-0520
blarson@education.wisc.edu
Office hours/Chat hours: Tuesdays 1:15-2:15
Or By Appointment

The course instructor will be available online during regularly scheduled office hours during which you may use the instant messaging/chat feature to communicate. If you are not able to meet during scheduled office hours, you may arrange an individual appointment with the course instructor or send questions via email. Email is most effective for questions that are relatively simple (e.g., verifying factual information). If your questions relate to conceptual issues (e.g., explaining course content or assignments), then direct communication is encouraged.

II. Course Description & Objectives

Course Description
This course is designed to provide the graduate student with an overview of current research and knowledge of human occupation and its relationship to health and well-being. Occupation is defined broadly as all daily activities including those that are productive, pleasurable and restorative. This course examines the current theory and data on occupation and health in relation to daily activities. Occupation is examined from a broad conceptual framework including examining the influences including chronobiology, cultural, social and the contexts of place and time.

Course Objectives
Upon course completion, the student will be able to:

1. Describe the contributions of daily activity to health and well-being according to current research.
2. Critically evaluate research and methodology issues related to the study of occupation.
3. Describe how culture, ecological contexts, and other factors shape the performance of occupation and health benefits derived from daily activities.
4. Describe ways in which occupation is organized, routinized, and experienced by individuals and within social groups.
5. Describe theoretical conceptualizations and research evidence on lifestyle balance.

III. Prerequisite Knowledge

Academic Knowledge
Degree in Occupational Therapy, Master’s degree in OT or equivalent per Admissions requirements

Minimum Technical Skills
1. Using the UW-Madison learning management system
2. Using email with attachments
3. Creating and submitting files in commonly used word processing program formats; Copying and pasting content; Using review and tracking features to edit and comment within documents
4. Downloading and installing software
5. Using spreadsheet programs

IV. Course Operation

Class Meeting
This course is offered in an online format. Students may be required to participate in synchronous or asynchronous online discussions or presentations of material. See course schedule for detail.

You are expected to have completed all assigned materials in advance of the relevant class session. If an extenuating circumstance arises and you are unable to attend a scheduled synchronous lecture, discussion or activity, inform the course instructor in advance so that adjustments to the planned activity structure can be made.

Course Format
This class will use online lectures, videos, interactive discussions, readings, and assignments to accomplish course objectives.

V. Course Policies

Academic Honesty and Integrity
You are required to adhere to all University, School of Education, Department of Kinesiology and OT Program standards regarding academic integrity. If you are not familiar with these standards, you are responsible for accessing, reading and understanding them.
University academic standards are outlined in Chapter 14 of the Wisconsin Administrative Code (UWS 14). Further information detailing University policies and procedures related to these standards is available at the Dean of Students Office, 75 Bascom Hall. Online documents include:

**Student Code of Conduct**
(http://www.wisc.edu/students/saja/misconduct/misconduct.html),

**Academic Misconduct**
(http://www.wisc.edu/students/saja/misconduct/academic_misconduct.html), and

**Student Academic Misconduct Policy & Procedures**

OT Program standards are defined in **OT Student Handbook**
(link to be added when Handbook is complete)

As members of a scholarly community dedicated to healthy intellectual development, students and faculty are expected to share responsibility for maintaining high standards of honesty and integrity in their academic work. Each student should reflect this sense of responsibility toward the community by submitting work that is a product of his or her own effort in a particular course, unless the instructor has directed otherwise.

The following are examples of violations of standards for academic honesty and are subject to sanction: Using resources beyond those specified by the instructor during exams; submitting collaborative work as one’s own; falsifying records, achievements, field or laboratory data, or other course work; stealing examinations or course materials; submitting work previously submitted in another course, unless specifically approved by the present instructor; falsifying documents or signing an instructor’s or administrator’s name to any document or form; plagiarism, or aiding in any of the above actions.

**Quoting and Paraphrasing**
To assist you in making certain that work you submit includes proper recognition of sources that you have used, a helpful resource is **Quoting and Paraphrasing Sources** from the UW Writing Center's **Writer's Handbook**
(http://www.wisc.edu/writing/Handbook/QuotingSources.html). It clarifies standards for using references.

**Collaboration**
Group study and discussion can substantially enhance student learning and the subject matter covered in this course frequently lends itself well to such group consideration. You are permitted – in fact, you are encouraged – to discuss course material with your classmates, your practice colleagues and others. However, with the exception of lecture notes or when specifically noted by the course instructor, you are not permitted to share materials related to course assignments, background questions, papers, or exams. This includes all draft and all finished work that you produce, in written and/or electronic form. If you have any questions regarding this policy in general or how it applies to a specific situation, you are responsible for asking the course instructor for clarification before you collaborate.
Academic Dishonesty
Academic Dishonesty during any component of the course may result in a course letter grade of F, and/or other disciplinary action as determined by the course coordinators. All violations of Academic Standards will be vigorously pursued since violation of the Academic Standards indicates serious character flaws incompatible with professional education.

Assignment Submission
All assignments should be completed by the assigned due date and submitted according to instructions in the assignment guidelines. Points will be deducted for late assignments. Reading assigned material prior to class lectures or discussions is essential to understanding course concepts and demonstrating acquired knowledge during assignments.

Class Decorum
Behavior that is appropriate in a health professional program is the same as behavior that is appropriate in professional practice: respectful, attentive, and well-mannered. Passive incivilities (e.g., lateness, inattention), disruptions (e.g., cell phone use, conversations during class), and overt incivilities (e.g., vulgarity, insulting comments, physical threats) all indicate disrespect. Such unprofessional behavior – whether directed toward class colleagues or course staff – is not acceptable and will be dealt with as necessary.

Course Communication
Email and news or information postings on the course webpage will be the primary means for communication. It is imperative that you check these sources regularly. Faculty will respond to student emails as quickly as possible and generally within ____ hours. Communications regarding any changes in course assignments, grading, or scheduling may be done during synchronous class discussion and will be provided in a written form as well.

Accommodations
It is the policy of the instructor of this course and the University of Wisconsin-Madison to provide an accessible, accommodating and supportive teaching and learning environment for all students. Students requiring special accommodation related to a disability should contact McBurney Disability Resource Center (702 W. Johnson Street, Suite 2104, Madison, WI 53715; website: http://www.mcburney.wisc.edu/; phone: 608-263-2741; text: 608-225-7956; fax: 608-265-2998; email: mcburney@studentlife.wisc.edu) for information about services and campus-related disability policies and to determine eligibility for services.

If you are requesting any accommodations in this class on the basis of disability, you should schedule an office appointment by email or phone with the course instructor within the first week of the semester. You may choose to maintain the confidentiality of your request by approaching the course coordinator during office hours to discuss accommodation needs. student should provide the instructor a copy of his/her McBurney Center VISA or accommodations may be mutually agreed upon between the instructor and student.

Rescheduling Course Activities Due To Student Absence
No exam, exercise or assignment will be rescheduled, except under extenuating circumstances. If extenuating circumstances occur (e.g., documented illness, hospitalization, official school business, death in family), the course instructor might elect to reschedule an assignment, exercise, or exam for the affected student. Rescheduling will be considered only if you have notified the course instructor prior to the relevant due date. At a minimum, you (or a friend, roommate, family member, etc.) must email the course instructor regarding the situation. No rescheduled activity or due date will be rescheduled a second time.

Technology
Students must comply with all applicable laws as well as with all University and School policies with regard to appropriate use of information technology and Internet content. They must exercise professional judgment when using information technology and take full responsibility for all electronic materials that they publish, transmit or possess. Students may not upload, post or transmit (including via email and social networking sites) content that is deemed inappropriate including any material that may be considered fraudulent, harassing, defamatory, or obscene; that is invasive of another's privacy; that promotes illegal behavior, refers to alcohol use, or promotes any commercial interest; or that accesses or distributes unauthorized course material. Students may not access, install, use or share any materials (e.g. written materials, images, movies) that violate applicable copyrights or license agreements. Students may not disrupt or interfere with the work of other students, faculty, or staff.

Netiquette
As a respectful community of adult learners it is important to remember some basic netiquette principles:

- In an on-line class, our main mode of communication is written. Therefore, it is important that you re-read your written communication. The "tone" is a very important part of electronic communication. When you read your message out loud, does it sound the way you would speak to another student in the classroom?
- When writing a reply posting, delete all extraneous information except the specific phrase, sentence, or comment to which you are replying. This not only helps the reader know what you are replying to, but also helps the reader save time by not wading through a long post, or worse, the entire included thread. It also makes it quicker for classmates to download or print a particular posting.
- Be specific, especially when asking questions.
- Humor can be difficult to convey in text, so make sure everyone realizes when you are trying to be funny. It is easy for messages to be misinterpreted since there are no physical gestures or voice inflections that accompany the text.
- Assume the best intentions of others in the class and be forgiving when you think that the tone of someone's post is offensive. It is easy to misread the tone of someone's written communication. If in doubt, ask an open, honest question about what the person meant so that you can clarify before making assumptions that damage your perception of your colleague.
- Stick to standard fonts -- Times New Roman, Arial, Helvetica, 12 or 14 pt. -- and colors -- black or blue.
• DON'T WRITE THE ENTIRE POSTING WITH YOUR CAPS LOCK ON. USE OF CAPS IS CONSIDERED YELLING IN ONLINE COMMUNICATION.

Grammar, Spelling and Fonts
Your writing style should not detract from the message. Clear communication is an essential skill for all professionals. Slang, abbreviations or incorrect grammar do not demonstrate professionalism. Use the spell check in your word processing program.

Grievance Procedures
Students who have a concern about fair treatment may convey their concern and receive a prompt hearing of their grievance. Complaints may be related to grades, classroom treatment, program admission, or other issues. A detailed description of School of Education Procedures may be found at: http://handbook.education.wisc.edu/GrievancePolicy.ashx

VI. Resource Materials

Required Texts (Available through the University Bookstore, www.uwbookstore.com)

Other Required Readings
Will be posted on the course website throughout course.

Course Website
The course has a website which provides access to important class documents such as the syllabus, assignment guides, case studies, and links to resources. Grades will also be posted on the site. All students enrolled in the course should be listed on the site. Please check that you have access to the website within the first few days of class opening. If you are not able to log on, notify the instructor as soon as possible. The website will be updated regularly and, therefore, it is important to check on a regular basis.

Technical Support
DoIT's Help Desk is available via LiveChat, phone and email for 19 hours a day, seven days a week, for walk-in customers eight hours a day, five days a week, and via a Web knowledgebase at all hours. The Help Desk knowledgebase has more than 3,000 documents, which were accessed online more than three million times during the year. See https://kb.wisc.edu/helpdesk/
Phone: 608-264-4357
Email: help@doit.wisc.edu (Response may not be immediate)

To chat with the Help Desk staff, click the LiveChat icon to initiate a chat session. Then, simply fill out the short form to start chatting with a Help Desk technician.
LiveChat is available from 8am-10pm, 7 days a week (excluding holidays)
No account information may be given out via LiveChat
Users of LiveChat must be affiliated with the UW and have a valid NetID
If you have problems initiating a LiveChat session, or need assistance with your NetID, password, or other account information, please call the DoIT Help Desk at +1-608-264-4357 (264-HELP)

Course specific Technology questions may be directed to:

Elizabeth Larson, Ph.D.
608-262-0520
blarson@education.wisc.edu

Division of Continuing Studies
608-262-1156
info@dcs.wisc.edu

VII. Assignments

<table>
<thead>
<tr>
<th>Assignment</th>
<th>Due Date</th>
<th>Percentage of Grade</th>
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<tbody>
<tr>
<td>Reflection on occupation-based practice</td>
<td></td>
<td>10</td>
</tr>
<tr>
<td>Essay or personal lifestyle balance project</td>
<td>November 3</td>
<td>20</td>
</tr>
<tr>
<td>Class leadership</td>
<td>As assigned</td>
<td>20</td>
</tr>
<tr>
<td>Synthesis posts</td>
<td>Weekly</td>
<td>20</td>
</tr>
<tr>
<td>Final project presentation</td>
<td>December 15</td>
<td>15</td>
</tr>
<tr>
<td>Final project paper</td>
<td>December 15</td>
<td>15</td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td>100%</td>
</tr>
</tbody>
</table>

Class readings: Participants will engage in online discussions based on assigned readings listed in the course outline. Before the discussion, students will read the assigned material and process the information independently. You are expected to read all core readings and one additional reading from the reading circle articles (as assigned). All students will respond to key questions on the core topic. Within your reading circle, you will prepare and present a brief description and analysis (less than 500 words) of your assigned reading to your group.

1. Reflection on occupation-based practice: Think about your current practice. In what ways are you able to utilize or not utilize an occupation-based approach? Write a post describing examples of how you use occupation-based practice currently (include a specific example if you have one), describe any barriers or limitations that you feel limit your ability to use occupation-based practice, describe any facilitators, and lastly describe what an ideal occupation-based practice would look like.

2. Essay or personal lifestyle balance project: Students may choose to do either an essay or a personal lifestyle balance project. The take home-essay will cover material from the first eight weeks of class. The essay questions will be distributed on October 27th and due on November
3rd. The personal lifestyle balance project will include doing a personal projects analysis, selecting one project that will promote better lifestyle balance and doing this lifestyle change for 5 weeks, and writing up the experience in a short paper. A guide for writing up the experience will be provided. The paper will also be due November 3rd.

3. Class leadership: Each student will prepare and lead a weekly class discussion. Student leaders will post queries to the class that include synthesis questions to stimulate discussion and require integration of content. Afterward, the student leader should summarize the discussion and address any gaps identified with further research.

4. Following each discussion, students will write a synthesis post applying the content to their practice or research area. This needs to be complete within four days of the discussion. Students will read and comment on two other posts.

5. Final project: This includes two parts: an oral presentation and written paper. This project is intended to give the student an opportunity to do an in-depth literature review of a particular area of research interest related to occupation and health. The presentation and paper should include:
   1. A general overview of research in the topic area specifically focused on evidence of the relationship of occupation and health, past and present using at least 20 research citations.
   2. Interpretation of the significance and implications of the issues that are being researched.
   3. Focus on one or two narrower issues within the broader topic.
   4. Areas of disagreement and controversy within the research community.
   5. Areas of future directions for research.
   6. Sample research questions generated by the student and based on this literature review.

The oral presentation should include an assigned reading for the class, and movenote presentation. Two weeks prior to presentation an outline of the presentation is due to the course instructor. One week prior to class the assigned reading should be distributed. The oral presentation will be 20 minutes, and be posted by December 8th.

Assignment Submission
Unless otherwise stated, each assignment must be electronically submitted to the course website prior to class on the assigned due date. In order to ensure equitable grade assignment, all assignments must be turned in on the due date. Assignments turned in late will not receive full credit. For every day that an assignment is late, 10% of the student’s earned points for that assignment will be deducted. Assignments will NOT be accepted more than one week late.

Guidelines for Assignment Format
Unless otherwise stated on the assignment guidelines:

1. All assignments should be typed, double-spaced, and use a font size no smaller than 14 characters per inch (e.g. Verdana 10-point font or Times New Roman 12-point font).
2. Use a 1-inch margin on all sides.
3. Insert page number for all assignments that are longer than 1 page.
4. All assignments should be written professionally using full sentences and paragraphs as appropriate.
5. Except for assignments to be written as occupational therapy documentation or otherwise specified, following the guidelines in the APA manual for writing style, including, but not limited to, headings, number, table format, citations, and reference list.
6. Clear and concise communication is a critical skill for OTs. Adhere to all page and space limits on assignments. Portions of the assignments exceeding page/space limits will not be considered in grading.

Course Participation
Students are expected to be prepared for discussions, timely in posting questions for the session they are leading and posting the summary of the discussion. Following each discussion, all students will post a synthesis describing the application of this knowledge to their practice area/research interests. These posts will be completed within 4 days of the discussion. Before the next class, students will comment on two of their peer’s posts.

VIII. Student Evaluation

Course grading is based on the successful completion of all assignments, and is broken down according to the following percentages and awarded points.

Final grade assignment will use the following scale:

<table>
<thead>
<tr>
<th>%</th>
<th>Grade</th>
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<tbody>
<tr>
<td>94-100</td>
<td>A</td>
</tr>
<tr>
<td>90-93.99</td>
<td>AB</td>
</tr>
<tr>
<td>84-89.99</td>
<td>B</td>
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<tr>
<td>80-83.99</td>
<td>BC</td>
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<tr>
<td>70-79.99</td>
<td>C</td>
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### IX. Schedule

<table>
<thead>
<tr>
<th>Week</th>
<th>Readings &amp; Assignments</th>
</tr>
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</table>
| **Week 1: Introduction** | Syllabus & course requirements  
Course overview  
**Readings:**  
| **Week 2: Relationship of occupation and health** | Core readings:  
**Reading circle:**  
| **Week 3: Lifestyle balance** | **Readings:**  
Reading circle:

**Week 4:** Organization of daily activity: Habit & routines

**Core Readings**
Reading circle:
Week 5: Culture and occupation

<table>
<thead>
<tr>
<th>Core readings:</th>
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Reading circle:


Week 6: Meaning and occupation

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<th>Readings:</th>
</tr>
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</table>

Reading circle:

### Week 7: Ecological contexts of place

**Core readings:**

**Reading circle:**

**Assignment:** Take-home essay distributed to class

### Week 8: Ecological contexts of place

**Readings:**
- Boniwell, I. (2005). Beyond time management: How the latest research on time perspective and perceived time use can assist clients...
| time: Temporality, time pressure and time scarcity | time-related concerns. *International Journal of Evidence Based Coaching and Mentoring*, 3, 61-74.  
Reading circle:  
**Assignment:** Essay due |
|---|---|
| **Week 9:** Productivity and health: Work and volunteering | Core readings:  
Reading circle:  
### Week 10: Balancing work and home

**Core readings**


**Reading circle:**


### Week 11: Restoration and health: Play and Leisure

**Core readings**


**Reading circle:**


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<tbody>
<tr>
<td><strong>Core readings:</strong></td>
<td><strong>Reading circle:</strong> Identify and read an article that uses Motivational Interviewing (MI) in an area of your interest or practice. Write a one page summary and critical analysis of the efficacy of MI in this practice area. Post these summaries four days in advance of the synchronous discussion.</td>
</tr>
</tbody>
</table>
| **Week 13: Occupation-based practice** | **Core readings:**  
**Reading circle:**  
Chien, C-W., Copley, R., & McLaren, C. (2013). Measures of |


**Week 14:**

**Occupation-based interventions & health promotion**

Read two articles from the following list and find 2 more in an area of interest. Articles should be intervention studies that utilize an occupation/activity as an intervention. Prepare a brief summary of each article and post to the discussion board.

**Readings:**


function by age, race, sex and education. Journal of Gerontology A Biological Science and Medical Science, 63, 745-750.


| Week 15 | Student Presentations |
I. Course Instructor:
Name, Title, (Field of Expertise)
Telephone (with area code)
Email
Office hours/Chat hours:
Or By Appointment

The course instructor will be available online during regularly scheduled office hours during which you may use the instant messaging/chat feature to communicate. If you are not able to meet during scheduled office hours, you may arrange an individual appointment with the course instructor or send questions via email. Email is most effective for questions that are relatively simple (e.g., verifying factual information). If your questions relate to conceptual issues (e.g., explaining course content or assignments), then direct communication is encouraged.

II. Course Description & Objectives

Course Description
Effective leadership and management in interprofessional contexts requires an understanding of organizational theories, management processes and leadership styles. In this course, students will examine the historical, theoretical and current practices of leadership, management and advocacy in health care, education and social service settings. Throughout the course, students will draw from distinctive leadership literature as well as role models in their chosen context. They will also learn key principles of effective networking, collaboration and interdisciplinary practice as a foundation for further development of leadership competencies. The course will include a reflective analysis of the student’s own leadership and management style. Students will develop a personalized professional development plan and work with a mentor/leader in their elected field to refine and implement the plan. Skills in strategic planning, program development and evaluation, fiscal or human resource management will be applied to a
specific project in the student’s professional context.

**Course Objectives**

Upon course completion, the student will be able to:

1. Identify leadership styles commonly found in OT history and culture and compare and contrast with the styles of other professionals with whom occupational therapists interact.
2. Select model(s) of leadership that best fits one’s own personal philosophy and future leadership goals and identify own current strengths and areas for growth. Develop a plan for acquiring the skills for achieving a specific future leadership goal.
3. Gather information on the leadership style, skills and outcomes of a leader in an inter-professional context and identify the supports and barriers needed to be an effective leader in that setting.
4. Identify and describe models of leadership useful in inter-professional settings and their impact on team dynamics, team effectiveness, consensus building and decision making.
5. Describe the role of power and politics in organizations and strategies for successfully managing situations in which they occur.
6. State the theoretical and empirical evidence related to determinants of employee attitudes and behavior. Describe effective strategies for modifying employee behavior.
7. Compare and contrast organizational theories and management processes as applied to various contexts relevant to managers in health care, education, and social service organizations.
8. Demonstrate skill in project and/or entrepreneurial management.
9. Create a plan for establishing a professional consulting role in an inter-professional context involving advocacy, program development or evaluation.

**III. Prerequisite Knowledge**

**Academic Knowledge**
Degree in Occupational Therapy, Master’s degree in OT or equivalent per Admissions requirements

**Minimum Technical Skills**
1. Using the UW-Madison learning management system
2. Using email with attachments
3. Creating and submitting files in commonly used word
3

processing program formats; Copying and pasting content; Using review and tracking features to edit and comment within documents
5. Downloading and installing software
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V. Course Policies

Academic Honesty and Integrity
You are required to adhere to all University, School of Education, Department of Kinesiology and OT Program standards regarding academic integrity. If you are not familiar with these standards, you are responsible for accessing, reading and understanding them.

University academic standards are outlined in Chapter 14 of the Wisconsin Administrative Code (UWS 14). Further information detailing University policies and procedures related to these standards is available at the Dean of Students Office, 75 Bascom Hall. Online documents include: Student Code of Conduct (http://www.wisc.edu/students/saja/misconduct/misconduct.html), Academic Misconduct (http://www.wisc.edu/students/saja/misconduct/academic_misconduct.html), and Student Academic Misconduct Policy & Procedures (http://www.wisc.edu/students/pdf/UWS-14%20Policy%20&%20Procedures.pdf).
OT Program standards are defined in *OT Student Handbook (link to be added when Handbook is complete)*

As members of a scholarly community dedicated to healthy intellectual development, students and faculty are expected to share responsibility for maintaining high standards of honesty and integrity in their academic work. Each student should reflect this sense of responsibility toward the community by submitting work that is a product of his or her own effort in a particular course, unless the instructor has directed otherwise.

The following are examples of violations of standards for academic honesty and are subject to sanction: Using resources beyond those specified by the instructor during exams; submitting collaborative work as one’s own; falsifying records, achievements, field or laboratory data, or other course work; stealing examinations or course materials; submitting work previously submitted in another course, unless specifically approved by the present instructor; falsifying documents or signing an instructor’s or administrator’s name to any document or form; plagiarism, or aiding in any of the above actions.

**Quoting and Paraphrasing**
To assist you in making certain that work you submit includes proper recognition of sources that you have used, a helpful resource is *Quoting and Paraphrasing Sources* from the UW Writing Center’s *Writer’s Handbook* ([http://www.wisc.edu/writing/Handbook/QuotingSources.html](http://www.wisc.edu/writing/Handbook/QuotingSources.html)). It clarifies standards for using references.

**Collaboration**
Group study and discussion can substantially enhance student learning and the subject matter covered in this course frequently lends itself well to such group consideration. You are permitted – in fact, you are encouraged – to discuss course material with your classmates, your practice colleagues and others. However, with the exception of lecture notes or when specifically noted by the course instructor, you are not permitted to share materials related to course assignments, background questions, papers, or exams. This includes all draft and all finished work that you produce, in written and/or electronic form. If you have any questions regarding this policy in general or how it applies to a specific situation, you are responsible for asking the course instructor for clarification before you collaborate.

**Academic Dishonesty**
Academic Dishonesty during any component of the course may result in a course letter grade of F, and/or other disciplinary action as determined by the course coordinators. All violations of Academic Standards will be vigorously pursued since violation of the Academic Standards indicates serious character flaws incompatible with professional
education.

**Assignment Submission**
All assignments should be completed by the assigned due date and submitted according to instructions in the assignment guidelines. Points will be deducted for late assignments. Reading assigned material prior to class lectures or discussions is essential to understanding course concepts and demonstrating acquired knowledge during assignments.

**Class Decorum**
Behavior that is appropriate in a health professional program is the same as behavior that is appropriate in professional practice: respectful, attentive, and well-mannered. Passive incivilities (e.g., lateness, inattention), disruptions (e.g., cell phone use, conversations during class), and overt incivilities (e.g., vulgarity, insulting comments, physical threats) all indicate disrespect. Such unprofessional behavior – whether directed toward class colleagues or course staff – is not acceptable and will be dealt with as necessary.

**Course Communication**
Email and news or information postings on the course webpage will be the primary means for communication. It is imperative that you check these sources regularly. Faculty will respond to student emails as quickly as possible and generally within 48 hours (Monday – Friday). Communications regarding any changes in course assignments, grading, or scheduling may be done during synchronous class discussion and will be provided in a written form as well.

**Accommodations**
It is the policy of the instructor of this course and the University of Wisconsin-Madison to provide an accessible, accommodating and supportive teaching and learning environment for all students. Students requiring special accommodation related to a disability should contact McBurney Disability Resource Center (702 W. Johnson Street, Suite 2104, Madison, WI 53715; website: http://www.mcburney.wisc.edu/; phone: 608-263-2741; text: 608-225-7956; fax: 608-265-2998; email: mcburney@studentlife.wisc.edu) for information about services and campus-related disability policies and to determine eligibility for services.

If you are requesting any accommodations in this class on the basis of disability, you should schedule an office appointment by email or phone with the course instructor within the first week of the semester. You may choose to maintain the confidentiality of your request by approaching the course coordinator during office hours to discuss
accommodation needs. Student should provide the instructor a copy of his/her McBurney Center VISA or accommodations may be mutually agreed upon between the instructor and student.

Rescheduling Course Activities Due To Student Absence
No exam, exercise or assignment will be rescheduled, except under extenuating circumstances. If extenuating circumstances occur (e.g., documented illness, hospitalization, official school business, death in family), the course instructor might elect to reschedule an assignment, exercise, or exam for the affected student. Rescheduling will be considered only if you have notified the course instructor prior to the relevant due date. At a minimum, you (or a friend, roommate, family member, etc.) must email the course instructor regarding the situation. No rescheduled activity or due date will be rescheduled a second time.

Technology
Students must comply with all applicable laws as well as with all University and School policies with regard to appropriate use of information technology and Internet content. They must exercise professional judgment when using information technology and take full responsibility for all electronic materials that they publish, transmit or possess. Students may not upload, post or transmit (including via email and social networking sites) content that is deemed inappropriate including any material that may be considered fraudulent, harassing, defamatory, or obscene; that is invasive of another’s privacy; that promotes illegal behavior, refers to alcohol use, or promotes any commercial interest; or that accesses or distributes unauthorized course material. Students may not access, install, use or share any materials (e.g. written materials, images, movies) that violate applicable copyrights or license agreements. Students may not disrupt or interfere with the work of other students, faculty, or staff.

Netiquette
As a respectful community of adult learners it is important to remember some basic netiquette principles:

- In an on-line class, our main mode of communication is written. Therefore, it is important that you re-read your written communication. The "tone" is a very important part of electronic communication. When you read your message out loud, does it sound the way you would speak to another student in the classroom?
- When writing a reply posting, delete all extraneous information except the specific phrase, sentence, or comment to which you are replying. This not only helps the reader know what you are replying to, but also helps the reader save time by not wading through a long post, or worse, the entire included thread. It also makes it quicker for classmates to download or print a particular posting.
Be specific, especially when asking questions.
Humor can be difficult to convey in text, so make sure everyone realizes when you are trying to be funny. It is easy for messages to be misinterpreted since there are no physical gestures or voice inflections that accompany the text.
Assume the best intentions of others in the class and be forgiving when you think that the tone of someone's post is offensive. It is easy to misread the tone of someone's written communication. If in doubt, ask an open, honest question about what the person meant so that you can clarify before making assumptions that damage your perception of your colleague.
Stick to standard fonts -- Times New Roman, Arial, Helvetica, 12 or 14 pt. -- and colors -- black or blue.
DON'T WRITE THE ENTIRE POSTING WITH YOUR CAPS LOCK ON. USE OF CAPS IS CONSIDERED YELLING IN ONLINE COMMUNICATION.

Grammar, Spelling and Fonts
Your writing style should not detract from the message. Clear communication is an essential skill for all professionals. Slang, abbreviations or incorrect grammar do not demonstrate professionalism. Use the spell check in your word processing program.

Grievance Procedures
Students who have a concern about fair treatment may convey their concern and receive a prompt hearing of their grievance. Complaints may be related to grades, classroom treatment, program admission, or other issues. A detailed description of School of Education Procedures may be found at:
http://handbook.education.wisc.edu/GrievancePolicy.ashx

VI. Resource Materials

Required Texts

Select one of the following to read and report:

One of the following:


Other Required Readings
Will be posted on the course website throughout course.

Optional Reading


Course Website
The course has a website which provides access to important class documents such as the syllabus, assignment guides, case studies, and links to resources. Grades will also be posted on the site. All students enrolled in the course should be listed on the site. Please check that you have access to the website within the first few days of class opening. If you are not able to log on, notify the instructor as soon as possible. The website will be updated regularly and, therefore, it is important to check on a regular basis.

Technical Support
DoIT’s Help Desk is available via LiveChat, phone and email for 19 hours a day, seven days a week, for walk-in customers eight hours a day, five days a week, and via a Web knowledgebase at all hours. The Help Desk knowledgebase has more than 3,000 documents, which were accessed online more than three million times during the year.
To chat with the Help Desk staff, click the LiveChat icon to initiate a chat session. Then, simply fill out the short form to start chatting with a Help Desk technician.

LiveChat is available from 8am-10pm, 7 days a week (excluding holidays)
No account information may be given out via LiveChat
Users of LiveChat must be affiliated with the UW and have a valid NetID
If you have problems initiating a LiveChat session, or need assistance with your NetID, password, or other account information, please call the DoIT Help Desk at +1-608-264-4357 (264-HELP)

Course specific Technology questions may be directed to:

*Insert Instructor/TA information*

Division of Continuing Studies
608-262-1156
info@dcs.wisc.edu

### VII. Assignments

<table>
<thead>
<tr>
<th>Assignment</th>
<th>Due Date</th>
<th>Percentage of Grade</th>
</tr>
</thead>
<tbody>
<tr>
<td>Asynchronous Online Discussion</td>
<td>Weekly</td>
<td>15%</td>
</tr>
<tr>
<td>Focus on theories of leadership, inter-</td>
<td></td>
<td></td>
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<tr>
<td>professional styles, cultures, power and</td>
<td></td>
<td></td>
</tr>
<tr>
<td>politics. Strategies for effective and</td>
<td></td>
<td></td>
</tr>
<tr>
<td>ethical management of behavior in the work</td>
<td></td>
<td></td>
</tr>
<tr>
<td>place. Team-based problem solving</td>
<td></td>
<td></td>
</tr>
<tr>
<td>of case scenarios.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Preparation (Depth &amp; Breadth of comments)</td>
<td></td>
<td>5%</td>
</tr>
<tr>
<td>- Participation (Frequency)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Leadership Style Self-Assessment</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Personality &amp; Leadership Assessments</td>
<td></td>
<td>5%</td>
</tr>
<tr>
<td>- Book review</td>
<td></td>
<td>15%</td>
</tr>
<tr>
<td>- Leadership style synthesis paper</td>
<td></td>
<td>15%</td>
</tr>
<tr>
<td>- Presentation to the Class</td>
<td></td>
<td>5%</td>
</tr>
<tr>
<td>Professional Development Plan &amp; Portfolio</td>
<td></td>
<td>10%</td>
</tr>
</tbody>
</table>
- Professional Development Goals
- Creating Action Steps & Curriculum Plan
- Constructing Portfolio Framework
- Identification and engagement with inter-professional mentor

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>100%</td>
</tr>
</tbody>
</table>

Assignment Descriptions

**Leadership Style Synthesis:**

**Personality & Leadership Assessments:** From a list provided by the course instructor, students will select, complete and score a minimum of one personality and two leadership self-assessments. Students will also identify a colleague or supervisor and request independent completion of one of the selected leadership assessments to provide the student an alternative view regarding his or her leadership style. Insights and information gained during this exercise will be incorporated into the Leadership Style Synthesis paper and presentation.

**Book review:** From the list of leadership books provided above under “Required Texts”, the student will select one book to read during the first half of the semester. Depending on the number of pages in the book, the student should divide the book into four (4) sections which will be read during the first 4 modules of the class. Upon completion of the book, the student will write a review of the book including the underlying leadership theories on which it is based, the basic tenets of leadership which the author(s) espouse, key principles or practices for successful leadership, a critique of the book, its strengths, and limitations. Insights and information gained during this exercise will be incorporated into the Leadership Style Synthesis paper and presentation.

**Leadership style synthesis paper:** Students will write a synthesis paper in which they reflect on what they have learned about leadership theories and practices as well as their own leadership style. The synthesis paper should include references to readings, the literature and to the self-assessments completed in the course. At the end of the paper, the student should identify three professional goals for growth in leadership skills. The paper should not exceed 5 double-space pages.

**Presentation:** Students will prepare a brief presentation (maximum of 15 slides) for the class on what was learned during the semester regarding leadership. The
student’s professional development goals and action steps for implementation should be included.

**Professional Development Plan & Portfolio:**

One aim of the OTD program is to promote the professional development of enrolled students. Upon entering the program students will consult with their academic adviser to identify an individual to serve as an inter-professional mentor. The adviser and mentor will meet online periodically with the student to assist in the development of a professional development plan.

**Professional Development Goals:** The first step in the development of the plan will be to conduct the leadership self-assessment as described above. Students will then write professional development goals and submit to the course instructor, academic adviser and inter-professional mentor for feedback.

**Creating Action Steps & Curriculum Plan:** Once identified, students will create specific action steps to achieving the professional development goals. A plan with the goals, action steps and timeline will be created and submitted to the course instructor, academic adviser and inter-professional mentor for feedback.

**Constructing Portfolio Framework:**

**Engagement with inter-professional mentor:**

**Assignment Submission**

Unless otherwise stated, each assignment must be electronically submitted to the course website prior to class on the assigned due date. In order to ensure equitable grade assignment, all assignments must be turned in on the due date. **Assignments turned in late will not receive full credit.** For every day that an assignment is late, 10% of the student’s earned points for that assignment will be deducted. **Assignments will NOT be accepted more than one week late.**

**Guidelines for Assignment Format**

Unless otherwise stated on the assignment guidelines:

1. All assignments should be typed, double-spaced, and use a font size no smaller than 14 characters per inch (e.g. Verdana 10-point font or Times New Roman 12-point font).
2. Use a 1-inch margin on all sides.
3. Insert page number for all assignments that are longer than 1 page.
4. All assignments should be written professionally using full sentences and paragraphs as appropriate.

5. Except for assignments to be written as occupational therapy documentation or otherwise specified, following the guidelines in the APA manual for writing style, including, but not limited to, headings, number, table format, citations, and reference list.

6. Clear and concise communication is a critical skill for OTs. Adhere to all page and space limits on assignments. Portions of the assignments exceeding page/space limits will not be considered in grading.

VIII. Student Evaluation

Course grading is based on the successful completion of all assignments, and is broken down according to the following percentages and awarded points.

Final grade assignment will use the following scale:

<table>
<thead>
<tr>
<th>%</th>
<th>Grade</th>
</tr>
</thead>
<tbody>
<tr>
<td>94-100</td>
<td>A</td>
</tr>
<tr>
<td>90-93.99</td>
<td>AB</td>
</tr>
<tr>
<td>84-89.99</td>
<td>B</td>
</tr>
<tr>
<td>80-83.99</td>
<td>BC</td>
</tr>
<tr>
<td>70-79.99</td>
<td>C</td>
</tr>
</tbody>
</table>

IX. Schedule

<table>
<thead>
<tr>
<th>Week</th>
<th>Readings</th>
<th>Activities/Assignments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Module 1: Leadership</td>
<td><strong>Readings:</strong></td>
<td>Activities:</td>
</tr>
<tr>
<td></td>
<td><em>Text:</em></td>
<td>- Introductions</td>
</tr>
<tr>
<td></td>
<td>Ledlow &amp; Coppola</td>
<td>- Review of syllabus</td>
</tr>
<tr>
<td></td>
<td>- Chapter 1 Leadership Thought</td>
<td>- Identify a leader or mentor from another</td>
</tr>
<tr>
<td></td>
<td>- Chapter 2 Determining Your</td>
<td>- Profession other</td>
</tr>
<tr>
<td>Foundations</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
- Own Leadership Style
  - Chapter 3 Understanding Leadership as Theory
  - Chapter 4 Chronology of Leadership Study and Practice
  - Section 1 of chosen leadership book

**E-articles:**

- As a group, select a case scenario of an ineffective leader. Propose a leadership theory, model or style that you believe would better suit the scenario. Provide your rationale.

**Discussion Prep:**
- Watch at least two Ted Talks on leadership and be prepared to critique the tenets of each speaker using theories of leadership from the readings to support or refute your arguments.

### Module 2: Personal Leadership Style

<table>
<thead>
<tr>
<th>Readings:</th>
<th>Activities:</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Text:</strong></td>
<td>- Complete a minimum of 3 Leadership Assessments/</td>
</tr>
<tr>
<td>Ledlow &amp; Coppola</td>
<td></td>
</tr>
<tr>
<td>- Chapter 5 Leadership</td>
<td></td>
</tr>
</tbody>
</table>
### Competence I
- Chapter 6 Leadership

### Competence II
- Section 2 of chosen leadership book

### E-articles:

### Case Study Prep:
- Coleman, Gulati & Segovia Chapter 6 The MBA of Hard knocks pg 203 – 209.

### Inventories from the list provided.
- Identify a colleague who is willing to complete an inventory of your leadership abilities/style
- Compare and contrast your own scores on the inventory with those of your colleague
- Reflect on your leadership style based on the theories in the Stewart article.

### Discussion Prep:
- Identify the complexities in your employment setting with regards to the diversity of the workforce and the environmental and societal expectations. Be prepared to discuss the competencies (e.g. building interpersonal relationships, influencing processes, motivating others, communication, etc.) essential for leadership in this setting.

### Case Study:
- Analyze the Hard Knocks story using the cogent points from Ledlow and Coppola and theories in Stewart references.

### Module 3: Leadership in Practice

<table>
<thead>
<tr>
<th>Readings:</th>
<th>Activities:</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Text:</strong></td>
<td>- Create a leadership model for a health organization. Relate</td>
</tr>
<tr>
<td>- Ledlow &amp; Coppola – Chapter</td>
<td></td>
</tr>
</tbody>
</table>
7 Leadership Assessment and Research
- Chapter 8 Leadership Models in Practice Section 3 of chosen leadership book

E-articles:

your model to constructs found in models in this week’s readings. Write a paragraph describing the attributes of your model and how it improves upon two models described in Chapter 8. Use programs like Power Point with shapes, smart art and charts to assist you in creating your model.

- Be prepared to answer these questions about your model.
  1. What are the assumptions, advantages and disadvantages of this model?
  2. Is funding needed to implement this model?
  3. How will the model’s owner create a ‘buy in’ from the employees?

- Create the ideal health leadership position that you want to have within 5 years. Be specific, not by business names, but by job titles.
- Develop a five-year plan based on the crawl-walk-run model that will help
### Module 4: Organizational Culture & Ethical Leadership

#### Readings:

**Text:**
- Ledlow & Coppola – Chapter 9 Leadership and the complex health organization: managing the org before it manages you
- Chapter 10 Ethics in Health

#### Activities:
- Review copies of the mission and vision statements for the organization you currently work for. If possible, obtain a copy of your organization’s goals.

### Case Study Prep:


### Discussion Prep:

- Using an organization you are currently employed by or have worked with in the past, consider the interworking’s of your organization. What examples of Bolman & Deal’s structural, human resource, political or symbolic frameworks exist in this organization?

### Case Study questions:

- What model is being used at the opera?
- How could you influence change here? What leadership style would you use?

You obtain your ultimate position in a leadership role. Use the suggestions in the Stoffel article to help you reach your goals.
- Develop a personal checklist to help you reach your goal.
<table>
<thead>
<tr>
<th>Module 5: Executive Roles of Health Care Leadership &amp; Stakeholders</th>
<th>Readings:</th>
<th>Activities:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Text: Ledlow &amp; Coppola</td>
<td>- In a one page paper, identify the steps, characteristics and behaviors a health leader should take to build relationships with stakeholders.</td>
</tr>
<tr>
<td></td>
<td>- Chapter 11 Measuring the Outcomes of Leadership Initiative</td>
<td>- Compare and contrast two or more models of health leader’s assessment and evaluation, and analyze the process of capturing the matrix for these assessments.</td>
</tr>
<tr>
<td></td>
<td>- Chapter 12 Understanding the Executive Roles of Health Leadership</td>
<td></td>
</tr>
<tr>
<td></td>
<td>E-articles:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>- Anthony T. Lo Sasso, A.T.;</td>
<td></td>
</tr>
</tbody>
</table>

**E-articles:**

- Section 4 of chosen leadership book

**Discussion Prep:**

- Be prepared to discuss your organization’s mission and vision statement using the CAAVE theoretical model (Fig 9-6 and Fig 9-8).
- Compare and contrast three ethical frameworks. Interpret the moral practices associated with those frameworks.

**Care**

**Care E-articles:**


**Discussion Prep:**

- Be prepared to discuss your organization’s mission and vision statement using the CAAVE theoretical model (Fig 9-6 and Fig 9-8).
- Compare and contrast three ethical frameworks. Interpret the moral practices associated with those frameworks.

**Module 5: Executive Roles of Health Care Leadership & Stakeholders**

**Online guest discussion leader:**

Sharon Gwinn, PhD, OTR/L President, Rehabilitation Innovations, Inc. Rehabilitation Innovations, Inc. 4466 William

**Activities:**

- In a one page paper, identify the steps, characteristics and behaviors a health leader should take to build relationships with stakeholders.
- Compare and contrast two or more models of health leader’s assessment and evaluation, and analyze the process of capturing the matrix for these assessments.
<table>
<thead>
<tr>
<th></th>
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</thead>
<tbody>
<tr>
<td>Dr. Gwinn is an occupational therapist with over 30 years’ experience. She started Rehabilitation Innovation 15 years ago. Her rehabilitation business has remained profitable within the ever changing landscape of reimbursement, standards and Medicare/cadid requirements.</td>
<td></td>
<td>Discussion Prep:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Based on your readings, prepare discussion questions to ask Dr. Gwinn. For example these could be about the stakeholders for her business, how to stay on top of the ever-changing reimbursement schemes, how cultural difference influence her decision making for her business, or how one manages decision making when Medicare and Medicaid are the payers.</td>
</tr>
<tr>
<td><strong>Case Study:</strong> Ledlow &amp; Coppola  - Crystal Riley, pp 427-430.</td>
<td></td>
<td>Case Study Prep:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- How would you have handled the situation Crystal was in? Based on your knowledge of leadership, if you had been Crystal’s supervisor, how would you have guided her? Support your answer with the course readings.</td>
</tr>
</tbody>
</table>

| Module 6 Readings: |  | Module 6 Activities: |
| Book Reviews | Text: Ledlow & Coppola  
|--------------|---------------------------------------------------------------|
| Guest Online  
Speaker, Past  
AOTA President, Dr. Virginia Stoffel. |
| - Chapter 14 Leadership: A Critical Factor for the Future Success of the Industry  
- Chapter 15 Leading nonperforming employees  
| - Prepare your book reviews for discussion. |
| Discussion Prep: |
| - Identify and describe how your book confirms or opposes the major premises set out in the Ledlow & Coppola text. |
| - Be prepared to discuss occupational therapy leadership values and styles with Dr. Stoffel. Are OT leadership styles different than other leaders? |
| Case Study Prep: |
| - Coleman, Gulati & Segovia, Fig A-4, Beliefs & Attitudes of Young leaders, pg 262. |
| Case Study: |
| - Study Figure A-4. How do these figures reflect, challenge or refute the Ledlow & Coppola information? |
| - Pretend you are Ledlow or Coppola. How would one of these men describe Stoffel’s leadership style? |

| Module 7  
Final  
Presentations |
|--------------|---------------------------------------------------------------|
| Readings:  
Text: Ledlow & Coppola  
- Chapter 13 Leading People and Managing Resources  
- Chapter 16 Responsibilities of Mentorship and Succession Planning |
| Activities:  
Students will prepare their final paper for presentation. |
| Case study:  
- Compare and contrast the Ledlow |

| | | |
| Case Study Prep: |
|------------------|------------------|
| - Gulati & Segovia, Chapter 3 People, Nonconforming Culture. | & Coppola text with Coleman, Gulati & Segovia text. Which aspects of these ring most true for you, your leadership style and experiences? Support your answer with both specific examples and literature. |
# Appendix

## Personality and Leadership Assessments

<table>
<thead>
<tr>
<th>Test Type</th>
<th>Description</th>
<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>The Bridgespan Group</td>
<td>The Bridgespan Group helps to pinpoint weaknesses in nonprofit leadership teams and organizations. To help address this challenge, we have developed a free diagnostic survey to help leaders understand where their organizations are strong – and what can be improved.</td>
<td><a href="http://www.bridgespan.org/getdoc/08770e97-afba-42fb-809a-66cc3fdafd45/Building-Future-Leaders-Diagnostic-Survey.aspx">http://www.bridgespan.org/getdoc/08770e97-afba-42fb-809a-66cc3fdafd45/Building-Future-Leaders-Diagnostic-Survey.aspx</a></td>
</tr>
<tr>
<td>Center for Coaching &amp; Mentoring (CCM) Mission</td>
<td>Company works with all levels of management and teams in various organizations and industries to develop and deliver training, consulting services and materials that facilitates change. Leadership Quizzes: <strong>Personal strengths or weaknesses how do you view development and training?</strong> <strong>What is the focus of your Performance Management Process?</strong> <strong>How Do You Influence Others?</strong> <strong>Coaching Up - Test Your Readiness</strong> <strong>How’s Your Team Spirit</strong> <strong>Test Your Coaching Skills</strong> <strong>The Empowering Work Environment</strong> <strong>Evaluate Your Organization's Coaching Climate</strong> <strong>Finding a Coach</strong> <strong>Are You Ready To Manage In The 21st Century?</strong> <strong>How In Step Are You With Generation X?</strong> <strong>What’s Your Commitment to Yourself?</strong> <strong>Leadership Trustworthiness: How Far Can They Throw You?</strong></td>
<td><a href="http://www.coachingandmentoring.com/quizzes.htm">http://www.coachingandmentoring.com/quizzes.htm</a></td>
</tr>
<tr>
<td>Myers Briggs Type Indicator</td>
<td>The Myers Briggs Type Indicator or the MBTI, identifies and describes 16 distinctive personality types that result from the interactions among the preferences.</td>
<td><a href="http://www.myersbriggs.org/my-mbti-personality-type/take-the-mbti-instrument/">http://www.myersbriggs.org/my-mbti-personality-type/take-the-mbti-instrument/</a></td>
</tr>
<tr>
<td>Ipersonic Personality Type</td>
<td>Our free personality test is extrapolated from a typology which was originally developed by the psychoanalyst Carl Gustaf Jung and later differentiated by Isabel Meyers and Katherine Briggs. This typology is based on different temperaments and attitudes respectively that are widely held to be hereditary. They take influence on our perceptions, thought process, feelings and behavior. This typology is based on four opposite pairs of personality dimensions.</td>
<td><a href="http://www.ipersonic.com/personality-types.html">http://www.ipersonic.com/personality-types.html</a></td>
</tr>
<tr>
<td>VARK</td>
<td>VARK is a questionnaire that provides users</td>
<td><a href="http://vark-">http://vark-</a></td>
</tr>
<tr>
<td>Visual, auditory, reading or kinesthetic test</td>
<td>with a profile of their learning preferences. These preferences are about the ways that they want to take-in and present information</td>
<td>learn.com/home/</td>
</tr>
</tbody>
</table>
Course Syllabus
Occ Ther 812
Current Trends Shaping Occupational Therapy Practice
Spring 1
3 credits

I. Course Instructor:
Elizabeth Larson, Ph.D., Associate Professor, Occupational Therapy Program
608-252-0520
blarson@education.wisc.edu
Office hours/Chat hours: Wednesdays 5:00-6:00
Or By Appointment

The course instructor will be available online during regularly scheduled office hours during which you may use the instant messaging/chat feature to communicate. If you are not able to meet during scheduled office hours, you may arrange an individual appointment with the course instructor or send questions via email. Email is most effective for questions that are relatively simple (e.g., verifying factual information). If your questions relate to conceptual issues (e.g., explaining course content or assignments), then direct communication is encouraged.

II. Course Description & Objectives

Course Description
Occupational therapy’s role in the history and continuing evolution of health care, education, and social welfare will be discussed in this course. Students will investigate and describe historical and current trends in theory, evidence, and policy that influence occupational therapy practice in different settings. The course will emphasize the development of skills to become active leaders in shaping, advocating and guiding occupational therapy through a continually evolving practice landscape.

Course Objectives
Upon course completion, the student will be able to:

1. Outline key trends and issues facing the delivery of occupational therapy services.
2. Describe the organization and dynamics of the delivery and financing systems for public health, education and social systems in the United States.
3. Identify and discuss key theories, current evidence, historical events and activities
influencing the evolution of inter-professional systems across practice settings.

4. State the status of current policy and legislative initiatives having the potential to impact service delivery including, but not limited to, ADA, IDEA, The Affordable Care Act, Medicare, Medicaid and Social Security.

5. Articulate the role of public policy on the delivery of occupational therapy services in a specific context.

6. Apply the principles and methods of policy analysis to one key national, state, or local occupational therapy practice issue and submit a policy statement to an advocacy, media or legislative body.

7. Discuss the ethical issues inherent in a selected reimbursement, regulatory, legal or intervention delivery problem.

III. Prerequisite Knowledge

Academic Knowledge
Degree in Occupational Therapy, Master’s degree in OT or equivalent per Admissions requirements

Minimum Technical Skills
1. Using the UW-Madison learning management system
2. Using email with attachments
3. Creating and submitting files in commonly used word processing program formats; Copying and pasting content; Using review and tracking features to edit and comment within documents
4. Downloading and installing software
5. Using spreadsheet programs

IV. Course Operation

Class Meeting
This course is offered in an online format. Students may be required to participate in synchronous or asynchronous online discussions or presentations of material. See course schedule for detail.

You are expected to have completed all assigned materials in advance of the relevant class session. If an extenuating circumstance arises and you are unable to attend a scheduled synchronous lecture, discussion or activity, inform the course instructor in advance so that adjustments to the planned activity structure can be made.

Course Format
This class will use online lectures, videos, interactive discussions, readings, and assignments to accomplish course objectives.
V. Course Policies

Academic Honesty and Integrity
You are required to adhere to all University, School of Education, Department of Kinesiology and OT Program standards regarding academic integrity. If you are not familiar with these standards, you are responsible for accessing, reading and understanding them.

University academic standards are outlined in Chapter 14 of the Wisconsin Administrative Code (UWS 14). Further information detailing University policies and procedures related to these standards is available at the Dean of Students Office, 75 Bascom Hall. Online documents include: Student Code of Conduct (http://www.wisc.edu/students/saja/misconduct/misconduct.html), Academic Misconduct (http://www.wisc.edu/students/saja/misconduct/academic_misconduct.html), and Student Academic Misconduct Policy & Procedures (http://www.wisc.edu/students/pdf/UWS-14%20Policy%20&%20Procedures.pdf).

OT Program standards are defined in OT Student Handbook (link to be added when Handbook is complete)

As members of a scholarly community dedicated to healthy intellectual development, students and faculty are expected to share responsibility for maintaining high standards of honesty and integrity in their academic work. Each student should reflect this sense of responsibility toward the community by submitting work that is a product of his or her own effort in a particular course, unless the instructor has directed otherwise.

The following are examples of violations of standards for academic honesty and are subject to sanction: Using resources beyond those specified by the instructor during exams; submitting collaborative work as one’s own; falsifying records, achievements, field or laboratory data, or other course work; stealing examinations or course materials; submitting work previously submitted in another course, unless specifically approved by the present instructor; falsifying documents or signing an instructor’s or administrator’s name to any document or form; plagiarism, or aiding in any of the above actions.

Quoting and Paraphrasing
To assist you in making certain that work you submit includes proper recognition of sources that you have used, a helpful resource is Quoting and Paraphrasing Sources from the UW Writing Center’s Writer’s Handbook (http://www.wisc.edu/writing/Handbook/QuotingSources.html). It clarifies standards for using references.

Collaboration
Group study and discussion can substantially enhance student learning and the subject matter covered in this course frequently lends itself well to such group consideration. You are permitted – in fact, you are encouraged – to discuss course material with your classmates, your practice colleagues and others. However, with the exception of lecture notes or when specifically noted
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Academic Dishonesty during any component of the course may result in a course letter grade of F, and/or other disciplinary action as determined by the course coordinators. All violations of Academic Standards will be vigorously pursued since violation of the Academic Standards indicates serious character flaws incompatible with professional education.

**Assignment Submission**
All assignments should be completed by the assigned due date and submitted according to instructions in the assignment guidelines. Points will be deducted for late assignments. Reading assigned material prior to class lectures or discussions is essential to understanding course concepts and demonstrating acquired knowledge during assignments.

**Class Decorum**
Behavior that is appropriate in a health professional program is the same as behavior that is appropriate in professional practice: respectful, attentive, and well-mannered. Passive incivilities (e.g., lateness, inattention), disruptions (e.g., cell phone use, conversations during class), and overt incivilities (e.g., vulgarity, insulting comments, physical threats) all indicate disrespect. Such unprofessional behavior – whether directed toward class colleagues or course staff – is not acceptable and will be dealt with as necessary.

**Course Communication**
Email and news or information postings on the course webpage will be the primary means for communication. It is imperative that you check these sources regularly. Faculty will respond to student emails as quickly as possible and generally within ____ hours. Communications regarding any changes in course assignments, grading, or scheduling may be done during synchronous class discussion and will be provided in a written form as well.

**Accommodations**
It is the policy of the instructor of this course and the University of Wisconsin-Madison to provide an accessible, accommodating and supportive teaching and learning environment for all students. Students requiring special accommodation related to a disability should contact McBurney Disability Resource Center (702 W. Johnson Street, Suite 2104, Madison, WI 53715; website: [http://www.mcburney.wisc.edu/](http://www.mcburney.wisc.edu/); phone: 608-263-2741; text: 608-225-7956; fax: 608-265-2998; email: mcburney@studentlife.wisc.edu) for information about services and campus-related disability policies and to determine eligibility for services.

If you are requesting any accommodations in this class on the basis of disability, you should schedule an office appointment by email or phone with the course instructor within the first week
of the semester. You may choose to maintain the confidentiality of your request by approaching the course coordinator during office hours to discuss accommodation needs. Student should provide the instructor a copy of his/her McBurney Center VISA or accommodations may be mutually agreed upon between the instructor and student.

Rescheduling Course Activities Due To Student Absence
No exam, exercise or assignment will be rescheduled, except under extenuating circumstances. If extenuating circumstances occur (e.g., documented illness, hospitalization, official school business, death in family), the course instructor might elect to reschedule an assignment, exercise, or exam for the affected student. Rescheduling will be considered only if you have notified the course instructor prior to the relevant due date. At a minimum, you (or a friend, roommate, family member, etc.) must email the course instructor regarding the situation. No rescheduled activity or due date will be rescheduled a second time.

Technology
Students must comply with all applicable laws as well as with all University and School policies with regard to appropriate use of information technology and Internet content. They must exercise professional judgment when using information technology and take full responsibility for all electronic materials that they publish, transmit or possess. Students may not upload, post or transmit (including via email and social networking sites) content that is deemed inappropriate including any material that may be considered fraudulent, harassing, defamatory, or obscene; that is invasive of another’s privacy; that promotes illegal behavior, refers to alcohol use, or promotes any commercial interest; or that accesses or distributes unauthorized course material. Students may not access, install, use or share any materials (e.g. written materials, images, movies) that violate applicable copyrights or license agreements. Students may not disrupt or interfere with the work of other students, faculty, or staff.

Netiquette
As a respectful community of adult learners it is important to remember some basic netiquette principles:

- In an on-line class, our main mode of communication is written. Therefore, it is important that you re-read your written communication. The “tone” is a very important part of electronic communication. When you read your message out loud, does it sound the way you would speak to another student in the classroom?
- When writing a reply posting, delete all extraneous information except the specific phrase, sentence, or comment to which you are replying. This not only helps the reader know what you are replying to, but also helps the reader save time by not wading through a long post, or worse, the entire included thread. It also makes it quicker for classmates to download or print a particular posting.
- Be specific, especially when asking questions.
- Humor can be difficult to convey in text, so make sure everyone realizes when you are trying to be funny. It is easy for messages to be misinterpreted since there are no physical gestures or voice inflections that accompany the text.
- Assume the best intentions of others in the class and be forgiving when you think that the
tone of someone’s post is offensive. It is easy to misread the tone of someone’s written communication. If in doubt, ask an open, honest question about what the person meant so that you can clarify before making assumptions that damage your perception of your colleague.

- Stick to standard fonts -- Times New Roman, Arial, Helvetica, 12 or 14 pt. -- and colors -- black or blue.
- DON’T WRITE THE ENTIRE POSTING WITH YOUR CAPS LOCK ON. USE OF CAPS IS CONSIDERED YELLING IN ONLINE COMMUNICATION.

Grammar, Spelling and Fonts
Your writing style should not detract from the message. Clear communication is an essential skill for all professionals. Slang, abbreviations or incorrect grammar do not demonstrate professionalism. Use the spell check in your word processing program.

Grievance Procedures
Students who have a concern about fair treatment may convey their concern and receive a prompt hearing of their grievance. Complaints may be related to grades, classroom treatment, program admission, or other issues. A detailed description of School of Education Procedures may be found at: http://handbook.education.wisc.edu/GrievancePolicy.ashx

VI. Resource Materials

Required Texts
Will be posted on the course website throughout course.

Course Website
The course has a website which provides access to important class documents such as the syllabus, assignment guides, case studies, and links to resources. Grades will also be posted on the site. All students enrolled in the course should be listed on the site. Please check that you have access to the website within the first few days of class opening. If you are not able to log on, notify the instructor as soon as possible. The website will be updated regularly and, therefore, it is important to check on a regular basis.

Technical Support
DoIT's Help Desk is available via LiveChat, phone and email for 19 hours a day, seven days a week, for walk-in customers eight hours a day, five days a week, and via a Web knowledgebase at all hours. The Help Desk knowledgebase has more than 3,000 documents, which were accessed online more than three million times during the year. See https://kb.wisc.edu/helpdesk/
Phone: 608-264-4357
Email: help@doit.wisc.edu (Response may not be immediate)

To chat with the Help Desk staff, click the LiveChat icon to initiate a chat session. Then, simply fill out the short form to start chatting with a Help Desk technician.
LiveChat is available from 8am-10pm, 7 days a week (excluding holidays)
No account information may be given out via LiveChat
Users of LiveChat must be affiliated with the UW and have a valid NetID
If you have problems initiating a LiveChat session, or need assistance with your NetID, password, or other account information, please call the DoIT Help Desk at +1-608-264-4357 (264-HELP)

Course specific Technology questions may be directed to:

Elizabeth Larson
608-252-0520
blarson@education.wisc.edu

Division of Continuing Studies
608-262-1156
info@dcs.wisc.edu

VII. Assignments

<table>
<thead>
<tr>
<th>Assignment</th>
<th>Due Date</th>
<th>Percentage of Grade</th>
</tr>
</thead>
<tbody>
<tr>
<td>Individual/Group posts</td>
<td>As assigned</td>
<td>30%</td>
</tr>
<tr>
<td>Policy Statement</td>
<td>Week</td>
<td>10%</td>
</tr>
<tr>
<td>Interprofessional practice priorities analysis</td>
<td>Week 5</td>
<td>10%</td>
</tr>
<tr>
<td>Global issues paragraph &amp; presentation</td>
<td>Week 8</td>
<td>10%</td>
</tr>
<tr>
<td>On-line modules/Case studies</td>
<td>As assigned</td>
<td>10%</td>
</tr>
<tr>
<td>Student policy presentation</td>
<td>Week 14 or 15</td>
<td>30%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td><strong>100%</strong></td>
</tr>
</tbody>
</table>

Individual/Group Posts: As noted on the course schedule, you will post answers to the week’s question on the website discussion thread. In groups you each take a role in summarizing, analyzing, and extending your group’s weekly discussion.

Policy Statement: Revisit one issue you previously described in weeks 1-5. Do an in-depth analysis of the issue. This should include: researching the topic, developing the arguments on both sides, conduct an “assessment” of the pros/cons and then generating a policy statement. Finally you will meet with a legislator or policy maker to discuss the policy and present your analysis. You will submit your analysis and a description of the meeting with the policy maker.

Interprofessional Practice Priorities Analysis: Visit the webpages of three other healthcare professions or professions that you collaborate with in your practice. Examine the mission statements and priorities of each profession. Analyze and describe the similarities and differences in the alignment of the professions’ goals.
Global Issues Paragraph & Presentation: Based on your experiences on an international listserv, write a paragraph describing your view of key issues in health promotion and healthcare services. You will post a 5-10 slide powerpoint that describes the issue, a needs analysis, current knowledge and practices, and suggestions for improving practice.

On-line Modules:
Student Policy Presentation: You will create a 20-minute narrated slideshow to present a) a key issue in your practice area, the legislation impacting this area of practice, b) the gaps and needs (underserved populations etc.), and c) proposed changes to practice (models of service delivery, interprofessional collaborations/ team management, legislation changes) that would address the issue and improve service delivery. Also prepare two discussion questions for the audience.

Assignment Submission
Unless otherwise stated, each assignment must be electronically submitted to the course website prior to class on the assigned due date. In order to ensure equitable grade assignment, all assignments must be turned in on the due date. **Assignments turned in late will not receive full credit.** For every day that an assignment is late, 10% of the student’s earned points for that assignment will be deducted. **Assignments will NOT be accepted more than one week late.**

Guidelines for Assignment Format
Unless otherwise stated on the assignment guidelines:

1. All assignments should be typed, double-spaced, and use a font size no smaller than 14 characters per inch (e.g. Verdana 10-point font or Times New Roman 12-point font).
2. Use a 1-inch margin on all sides.
3. Insert page number for all assignments that are longer than 1 page.
4. All assignments should be written professionally using full sentences and paragraphs as appropriate.
5. Except for assignments to be written as occupational therapy documentation or otherwise specified, following the guidelines in the APA manual for writing style, including, but not limited to, headings, number, table format, citations, and reference list.
6. Clear and concise communication is a critical skill for OTs. Adhere to all page and space limits on assignments. Portions of the assignments exceeding page/space limits will not be considered in grading.

Course Participation
Students are expected to: 1) be on time on-line for participation in weekly discussions (as noted on the syllabus), 2) complete discussion initial posts by Sunday 12 P.M. (noon) and complete group discussion roles tasks by Tuesday 11:59 P.M., and 3) complete and post assignments in the dropbox or on the discussion page as appropriate by 11:59 P.M. on the assigned due date. Students will notify the course instructor in advance if they are unable to attend class. Student’s posts should reflect a thoughtful complete consideration of the topic.
VIII. Student Evaluation

Course grading is based on the successful completion of all assignments, and is broken down according to the following percentages and awarded points.

Final grade assignment will use the following scale:

<table>
<thead>
<tr>
<th>%</th>
<th>Grade</th>
</tr>
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<tbody>
<tr>
<td>94-100</td>
<td>A</td>
</tr>
<tr>
<td>90-93.99</td>
<td>AB</td>
</tr>
<tr>
<td>84-89.99</td>
<td>B</td>
</tr>
<tr>
<td>80-83.99</td>
<td>BC</td>
</tr>
<tr>
<td>70-79.99</td>
<td>C</td>
</tr>
</tbody>
</table>

IX. Schedule

Insert course schedule per each syllabus.

<table>
<thead>
<tr>
<th>Week 1</th>
<th>(Objectives/)Readings</th>
<th>Activities/ Assignments</th>
</tr>
</thead>
</table>
| History & evolution of OT within healthcare                                                                                     1-Complete your profile on the website
| Cassidy, J.C. (1988). Access to health care: A clinician’s opinion about an ethical issue. *American Journal of Occupational Therapy*, 42, 295-299. 3-In a website post, describe a quandary or issue related to state or national heath care policy that influences your current practice
<p>| Week 4 | Global Issues in Occupational Therapy | Rogers, S. (2012). Leadership through an occupational lens: Celebrating our territory. Australian Journal of Occupational Therapy, 59, 172-179. Rogers, S., Clark, M., Banks, R. et al. (2009). A comparison of international occupational therapy competencies: Implications for Australian standards in the new millennium. Australian Occupational Therapy Journal, 56, 372-383. 1-Identify current international OT associations and visit their websites. On one of these sites, sign up for a listserv to receive posts/ participate in international discussions. Post once a week, for four weeks, on policy and/or practice issues. 2-Share your thoughts/experiences on these discussions in a website post to your discussion circle on week 8. 3- Online asynchronous discussion compare three international journals on a topic specific to your practice area; describe similarities and differences in approaches |
| Week 5 | Intersections of healthcare professions | 1-Write a definition of interprofessional |</p>
<table>
<thead>
<tr>
<th>Week 6</th>
<th>Policies guiding current practice</th>
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Week 6 - Priority

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<tr>
<th>Week 7</th>
<th>Visioning the future: Policy change in practice</th>
</tr>
</thead>
</table>

Week 7 - Practice and identify key elements.
1-Review relevant provisions of laws that govern practice and reimbursement in your practice area. These may include: Affordable Care Act, IDEA, Medicare & Medicaid laws.
2-Visit the AOTPAC website. What are the current priorities of AOTA in legislation?
3-Describe in a post how the above laws impact your practice, and how your visions for health care reform align with the AOTPAC activities. Expand upon the gaps and the prioritization of issues in your post.
4- Skype talk with AOTA Lobbyist

<table>
<thead>
<tr>
<th>Week 8</th>
<th>Emerging practice environments</th>
</tr>
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</table>

Week 8 - Prepare a brief paragraph and short powerpoint to share the global/international issues from your participation in an international listserve. Prepare and post a brief paragraph and short 5 minute powerpoint. Review powerpoints and reply to queries about...
<table>
<thead>
<tr>
<th>Week</th>
<th>Topic</th>
<th>References</th>
</tr>
</thead>
</table>
| 9    | Using technology to extend & enhance practice | Hollenberg, Daniel; Lytle, Millennia; Walji, Rishma; et al. (2013). "Telerehabilitation: Current Perspectives Addressing provider shortage in underserviced areas: The role of traditional, complementary and alternative medicine (TCAM) providers in Canadian rural healthcare." European Journal of Integrative Medicine, 5, SI15-26.  
<table>
<thead>
<tr>
<th>Week 13</th>
<th>Issues in Aging</th>
</tr>
</thead>
<tbody>
<tr>
<td>Complete on-line module/case study.</td>
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</table>

<table>
<thead>
<tr>
<th>Week 14</th>
<th>Student presentations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create a 20-minute narrated slideshow (using any program—Explain Anything App, Prezzi, Microsoft Powerpoint etc.) to present a) a key issue in your practice area, the legislation impacting this area of practice, b) the gaps and needs (underserved populations etc.), and c) proposed changes to practice (models of service delivery, interprofessional collaborations/ team management, legislation changes) that would address the issue and improve service delivery. Also prepare two discussion questions and post them.</td>
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</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Week 15</th>
<th>Student presentations</th>
</tr>
</thead>
</table>
I. Course Instructor:
Deborah Bebeau, (Ed.D.), MS, OTR
608-262-0093
dbebeau@education.wisc.edu
Office hours/Chat hours: By Appointment

The course instructor will be available online during regularly scheduled office hours during which you may use the instant messaging/chat feature to communicate. If you are not able to meet during scheduled office hours, you may arrange an individual appointment with the course instructor or send questions via email. Email is most effective for questions that are relatively simple (e.g., verifying factual information). If your questions relate to conceptual issues (e.g., explaining course content or assignments), then direct communication is encouraged.

II. Course Description & Objectives

Course Description

“The focus on workforce retraining to build interprofessional teamwork and team-based care continues, particularly in the context of improving institutional quality (effectiveness) and safety (Agency for Healthcare Research and Quality, 2008; Baker et al., 2005a, 2005b; King et al., 2008). Growing evidence supports the importance of better teamwork and team-based care delivery and the competencies needed to provide that kind of care.”
Interprofessional Education Collaborative Expert Panel (2011)

In this course, students will differentiate and define the unique role their profession plays in interprofessional practice. Students will also articulate the role of the client and the philosophy, guiding theories, practice models and roles of other professional disciplines on an interprofessional team. The training requirements of other disciplines on the team as well as the competencies for interprofessional education will be compared and contrasted as students seek to grow in their professional identity. Students will create a situated, interactive case scenario demonstrating a community of practice addressing a client problem. Appropriate models of interprofessional practice in the chosen setting and the evidence supporting possible interventions to address the problem will be identified. Students will generate and implement
strategies for the team to effectively work towards improving quality of care. Students will also learn efficient methods for evaluating the effectiveness of the chosen intervention and demonstrating continuous quality improvement in the practice setting.

**Course Objectives**
Upon course completion, the student will be able to:

1. Define and collaboratively create an evidence based solution to an interprofessional problem related to his/ her practice area while maintaining a climate of mutual respect and shared values.
2. Define one’s own role and those of other professions to appropriately lead a team in assessing and addressing the needs of an individual, system or population in a setting applicable to his/her practice area.
3. Identify the evidence based approaches that support innovative communication with clients, families, communities, and other professionals in a responsive and responsible manner that supports a team approach to intervention.
4. Identify and apply relationship-building values and the principles of team dynamics to perform effectively in different team roles to plan and deliver quality care that is safe, timely, efficient, effective, and equitable.
5. Examine and understand the need for a common language of functioning: the International Classification of Functioning, Disability, and Health.
6. Identify the challenges and benefits to interprofessional practice dependent on the philosophy and culture of various settings.
7. Articulate the unique role of his/ her profession on the interprofessional team for a chosen practice setting and discuss how his/ her discipline interfaces with other professions identifying areas of similarity and difference.
8. Identify and implement strategies for achieving one goal that will strengthen the student’s professional identity within an interprofessional team.
9. Describe the power of case scenarios for leading teams in learning collaborative skills and solving practice problems.
10. Build a model of interprofessional collaboration and test its effectiveness in a practice setting.
11. Create a continuous quality improvement plan to address a specific practice intervention.


**III. Prerequisite Knowledge**

**Academic Knowledge**
Degree in Occupational Therapy, Master’s degree in OT or equivalent per Admissions requirements
Minimum Technical Skills
1. Using the UW-Madison learning management system
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Students must comply with all applicable laws as well as with all University and School policies with regard to appropriate use of information technology and Internet content. They must
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Phone: 608-264-4357
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Course specific Technology questions may be directed to:
Deborah Bebeau MS, OTR
608-262-0093
dbebeau@education.wisc.edu
Division of Continuing Studies
VII. Assignments

<table>
<thead>
<tr>
<th>Assignment</th>
<th>Due Date</th>
<th>Percentage of Grade</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personal Bio</td>
<td>Week 1</td>
<td>5%</td>
</tr>
<tr>
<td>Annotated Bibliography</td>
<td>Week 8</td>
<td>15%</td>
</tr>
<tr>
<td>Discussions</td>
<td>Bi-weekly</td>
<td>20%</td>
</tr>
<tr>
<td>Interprofessional Interview</td>
<td>Week 4</td>
<td>15%</td>
</tr>
<tr>
<td>Journal Reflections</td>
<td>Bi-weekly</td>
<td>20%</td>
</tr>
<tr>
<td>Interprofessional CS/CR</td>
<td>Final date</td>
<td>25%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td><strong>100%</strong></td>
</tr>
</tbody>
</table>

Assignments are organized within eight modules and each module lasts approximately 2 weeks.

- **Personal Bio** – Purpose of this assignment is to share with classmates and instructor information about yourself. Create a Movenote that contains the following information: your name, current area of practice, current interprofessional issue of interest to you, fun fact about you, and goal for course.

  Movenote allows you to send a video message accompanied with a Power Point slide show. For this assignment your Movenote presentation should be 5-minutes or less. Please create 5 slides for this presentation. You should use your 5-minute narration to describe your slides in detail.

  When using Movenote it's best to complete your slides first in Power Point and then save the PP files as a pdf file before uploading to Movenote. For some reason pdf files work better in Movenote and the text & images don't move around when they're uploaded. You can sign up for Movenote at: [http://www.movenote.com/](http://www.movenote.com/). Movenote should take you less than a half hour to master.

  I encourage everyone to listen to each other's Movenote messages. Be sure to introduce yourself at the beginning of your message since I have not met most of you.

- **Learn@UW & Group Discussion** - All modules will include on-line discussion questions. Each student is required to post at least one primary comment that represents his/her position and/or thoughts about the discussion question. This primary post is to be approximately 200 words in length. The deadlines for posting are in the course schedule section of the syllabus.

  As well, it is required that each student make 2 other comments/reactions/questions regarding the posts of colleagues (of approximately 50 words in length). These responses are expected to make a contribution to the discussion.
You are encouraged to participate to a greater extent on the discussion board questions. The above represents the minimum amount of participation to earn the allotted points.

- **Self-Reflection Journals** - Each student will write a bi-weekly reflection journal (one for each module). The reflection can be about anything that he/she found particularly interesting or important from the week’s readings and/or discussions. Each journal is to be approximately 400 words in length. The deadline for posting your weekly journal entry is Sundays at noon. The journals will not be posted for general viewing.

- **Interview** - Each student will interview someone who works in an area of practice other than OT or a person who holds a leadership position of interest to you (i.e. supervisor, administrator, researcher, instructor, etc). You will develop the questions but you will want to get a better understanding of the major issues facing their institution in regard to interprofessional communication, interaction, and professionalism.

  You will post to Learn@UW a PowerPoint presentation of the main findings from the interview. What did you learn? What surprised you? How do their thoughts support or contract what you have read thus far in the class?

- **Annotated Bibliography** – Each student will create an annotated bibliography about a topic of his/her choosing related to an interprofessional issue. The interview may help with selection of a topic. This is due at the midpoint of the course (check course calendar for the exact date), but you should start planning the topic you will research so that you have enough time to adequately complete the literature overview, analysis of research and literature, and to summarize your thinking about the research/current literature in a coherent, concise paper.

  This learning activity has 3 parts:
  
  - Identify your topic (e-mail your idea(s) to course faculty; topic identification should be completed at the beginning of the module)
  - After "approval" from the course faculty, begin your literature overview activities (continues through the course)
  - Write and submit your annotated bibliography (due at the mid-point of the course in Module 4, check syllabus/calendar for exact date)

- **Case Scenario/Case Reader** – Each student will create a case scenario via the CSCR software for the purpose of use as a training tool for leading teams in learning collaborative skills and solving practice problems in a preferred context determined by the student. Specific directions to use of the tool and assignment guide can be found on Learn@UW.

**Assignment Submission**

Unless otherwise stated, each assignment must be electronically submitted to the course website prior to class on the assigned due date. In order to ensure equitable grade assignment, all assignments must be turned in on the due date. **Assignments turned in late will not receive full credit.** For every day that an assignment is late, 10% of the student’s earned points for that assignment will be deducted. **Assignments will NOT be accepted more than**
one week late.

Guidelines for Assignment Format

Unless otherwise stated on the assignment guidelines:

1. All assignments should be typed, double-spaced, and use a font size no smaller than 14 characters per inch (e.g. Verdana 10-point font or Times New Roman 12-point font).
2. Use a 1-inch margin on all sides.
3. Insert page number for all assignments that are longer than 1 page.
4. All assignments should be written professionally using full sentences and paragraphs as appropriate.
5. Except for assignments to be written as occupational therapy documentation or otherwise specified, following the guidelines in the APA manual for writing style, including, but not limited to, headings, number, table format, citations, and reference list.
6. Clear and concise communication is a critical skill for OTs. Adhere to all page and space limits on assignments. Portions of the assignments exceeding page/space limits will not be considered in grading.

VIII. Student Evaluation

Course grading is based on the successful completion of all assignments, and is broken down according to the following percentages and awarded points.

Final grade assignment will use the following scale:

<table>
<thead>
<tr>
<th>%</th>
<th>Grade</th>
</tr>
</thead>
<tbody>
<tr>
<td>94-100</td>
<td>A</td>
</tr>
<tr>
<td>90-93.99</td>
<td>AB</td>
</tr>
<tr>
<td>84-89.99</td>
<td>B</td>
</tr>
<tr>
<td>80-83.99</td>
<td>BC</td>
</tr>
<tr>
<td>70-79.99</td>
<td>C</td>
</tr>
</tbody>
</table>
## IX. Schedule

<table>
<thead>
<tr>
<th>Module (Each module is 2 weeks)</th>
<th>Readings</th>
<th>Activities/ Assignments</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Module 1:</strong> Welcome and Course Orientation</td>
<td><strong>Readings:</strong> Review Course Syllabus</td>
<td><strong>Activities:</strong> 1. Syllabus Help Discussion post 2. Personal Bio 3. Participate in Learn@UW Discussion questions 4. Post journal entry</td>
</tr>
<tr>
<td><strong>Module 2:</strong> Research Connections/ An Interprofessional Approach to Rehabilitation</td>
<td><strong>Readings:</strong> Ch. 3 (Dean text), Review tips for Writing at: <a href="https://owl.english.purdue.edu/owl/resource/614/01/">https://owl.english.purdue.edu/owl/resource/614/01/</a> White, MJ, Gutierrez, A, McLaughlin, C, Ezaiakonwa, C, Newman, LS, White, M, Thayer, B, Davis, K, Williams, M, Asselin, G. (2013). A pilot for understanding interdisciplinary teams in rehabilitation practice. <em>Rehabilitation Nursing</em>, 38(3), 142-152.</td>
<td><strong>Activities:</strong> 1. Identify an interprofessional issue/challenge related to your practice area to research for your annotated bibliography. Post your issue to the Discussion board and begin an “abbreviated” review of current literature 2. Participate in the Learn@UW Discussion questions 3. Complete interview with selected professional and upload PPT to Learn@UW 4. Post journal entry</td>
</tr>
<tr>
<td><strong>Module 3:</strong> Introduction to the International Classification of Functioning, Disability and Health – There is a need for a common language</td>
<td><strong>Readings:</strong> Ch. 2 (Dean text)</td>
<td><strong>Activities:</strong> 1. Participate in Learn@UW Discussion questions 2. Post journal entry</td>
</tr>
<tr>
<td>Module 5: Interprofessional Leadership</td>
<td>Readings:</td>
<td></td>
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<td>--------------------------------------</td>
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<tr>
<td>Review the following website for the CSCR assignment: <a href="http://engage.wisc.edu/software/cscr/">http://engage.wisc.edu/software/cscr/</a></td>
<td></td>
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</tbody>
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<table>
<thead>
<tr>
<th>Module 6: Interprofessional communication</th>
<th>Readings:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brooks V., Rhodes B., Tefft N. (2014). When opposites don't attract: one rehabilitation hospital's journey to improve communication and collaboration</td>
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</table>

<table>
<thead>
<tr>
<th>Activities:</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Participate in Learn@UW Discussions</td>
</tr>
<tr>
<td>2. Post journal entry</td>
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</table>
### Module 7: Metrics for Success

**Readings:**

**Activities:**
1. Submission of Interprofessional collaborative CS/CR project
2. Participate in Learn@UW discussions
3. Post journal entry

### Module 8: Wrap Up

**Activities:**
1. Participate in Learn@UW Discussions
2. Post journal entry
Course Syllabus
Occ Ther 814
Communicating OT to Interprofessional Audiences
Summer 3
3 credits

I. Course Instructor:
Karla Ausderau, PhD, OTR/L
608-262-0653
kausderau@wisc.edu
Office hours/Chat hours: By Appointment

The course instructor will be available online during regularly scheduled office hours during which you may use the instant messaging/chat feature to communicate. If you are not able to meet during scheduled office hours, you may arrange an individual appointment with the course instructor or send questions via email. Email is most effective for questions that are relatively simple (e.g., verifying factual information). If your questions relate to conceptual issues (e.g., explaining course content or assignments), then direct communication is encouraged.

II. Course Description & Objectives

Course Description
Leaders frequently must communicate their ideas and knowledge to a variety of audiences in a compelling manner. In this course students will learn the necessary skills for effectively designing and implementing professional presentations in a variety of interprofessional contexts including educational settings, professional conferences, practice workshops, and scholarly contributions. The key principles for building effective presentations, whether oral, written or interactive, will be presented. The course will include the review and critique of communication from various media presented by occupational therapy leaders as well as peers enrolled in the program. Students will apply the principles learned to a specific project for presentation to an interprofessional audience.

Course Meeting
Class will meet online Thursday evenings from 6:00-8:00 pm.
Course Objectives
Upon course completion, the student will be able to:

1. Compare and contrast adult learning theories and their application in various interprofessional learning situations.
2. State and apply key principles of effective communication to the presentation of information through oral, written and interactive media.
3. Choose effective communication tools and techniques, including information systems and communication technologies, to facilitate discussions and interactions that enhance effective communication in interprofessional settings.
4. Prepare a professional manuscript for a relevant professional publication or academic journal on a topic related to current practice or capstone project using professional language and writing style to communicate information incorporating the specific publication format.
5. Prepare and present a presentation using appropriate technology and style for targeted audience and demonstrate modifications necessary to the presentation for a different interprofessional audience.
6. Critique the work of peers, providing constructive feedback on their interprofessional presentations and writing.

III. Prerequisite Knowledge

Academic Knowledge
Degree in Occupational Therapy, Master’s degree in OT or equivalent per Admissions requirements

Minimum Technical Skills
1. Using the UW-Madison learning management system
2. Using email with attachments
3. Creating and submitting files in commonly used word processing program formats; Copying and pasting content; Using review and tracking features to edit and comment within documents
4. Downloading and installing software
5. Using spreadsheet programs

IV. Course Operation

Class Meeting
This course is offered in an online format. Students may be required to participate in synchronous or asynchronous online discussions or presentations of material. See course schedule for detail.
You are expected to have completed all assigned materials in advance of the relevant class session. If an extenuating circumstance arises and you are unable to attend a scheduled synchronous lecture, discussion or activity, inform the course instructor in advance so that adjustments to the planned activity structure can be made.

Course Format
This class will use online lectures, videos, interactive discussions, readings, and assignments to accomplish course objectives.

V. Course Policies

Academic Honesty and Integrity
You are required to adhere to all University, School of Education, Department of Kinesiology and OT Program standards regarding academic integrity. If you are not familiar with these standards, you are responsible for accessing, reading and understanding them.

University academic standards are outlined in Chapter 14 of the Wisconsin Administrative Code (UWS 14). Further information detailing University policies and procedures related to these standards is available at the Dean of Students Office, 75 Bascom Hall. Online documents include:
Student Code of Conduct (http://www.wisc.edu/students/saja/misconduct/misconduct.html),
Academic Misconduct (http://www.wisc.edu/students/saja/misconduct/academic_misconduct.html), and

OT Program standards are defined in OT Student Handbook (link to be added when Handbook is complete)

As members of a scholarly community dedicated to healthy intellectual development, students and faculty are expected to share responsibility for maintaining high standards of honesty and integrity in their academic work. Each student should reflect this sense of responsibility toward the community by submitting work that is a product of his or her own effort in a particular course, unless the instructor has directed otherwise.

The following are examples of violations of standards for academic honesty and are subject to sanction: Using resources beyond those specified by the instructor during exams; submitting collaborative work as one’s own; falsifying records, achievements, field or laboratory data, or other course work; stealing examinations or course materials; submitting work previously submitted in another course, unless specifically approved by the present instructor; falsifying documents or signing an instructor’s or administrator’s name to any document or form; plagiarism, or aiding in any of the above actions.

Quoting and Paraphrasing
To assist you in making certain that work you submit includes proper recognition of sources that
you have used, a helpful resource is *Quoting and Paraphrasing Sources* from the UW Writing Center’s *Writer’s Handbook* ([http://www.wisc.edu/writing/Handbook/QuotingSources.html](http://www.wisc.edu/writing/Handbook/QuotingSources.html)). It clarifies standards for using references.

**Collaboration**

Group study and discussion can substantially enhance student learning and the subject matter covered in this course frequently lends itself well to such group consideration. You are permitted – in fact, you are encouraged – to discuss course material with your classmates, your practice colleagues and others. However, with the exception of lecture notes or when specifically noted by the course instructor, you are not permitted to share materials related to course assignments, background questions, papers, or exams. This includes all draft and all finished work that you produce, in written and/or electronic form. If you have any questions regarding this policy in general or how it applies to a specific situation, you are responsible for asking the course instructor for clarification before you collaborate.

**Academic Dishonesty**

Academic Dishonesty during any component of the course may result in a course letter grade of F, and/or other disciplinary action as determined by the course coordinators. All violations of Academic Standards will be vigorously pursued since violation of the Academic Standards indicates serious character flaws incompatible with professional education.

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Course specific Technology questions may be directed to:

Karla Ausderau, PhD
608-262-0653
kausderau@wisc.edu

Division of Continuing Studies
608-262-1156
info@dcs.wisc.edu

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<table>
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</thead>
<tbody>
<tr>
<td>Personal Bio</td>
<td>Week 1</td>
<td>Required</td>
</tr>
<tr>
<td>Discussions</td>
<td>Bi-weekly</td>
<td>20%</td>
</tr>
<tr>
<td>Critique of Slagle Lectures</td>
<td>Mid-Semester</td>
<td>10%</td>
</tr>
<tr>
<td>Critique of Class Presentations</td>
<td>Throughout Course</td>
<td>10%</td>
</tr>
<tr>
<td>Interprofessional Presentation/Self Reflection</td>
<td>Final Date</td>
<td>30%</td>
</tr>
<tr>
<td>Professional Publication Manuscript</td>
<td>Final Date</td>
<td>30%</td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td>100%</td>
</tr>
</tbody>
</table>
• **Personal Bio** – Purpose of this assignment is to share with classmates and instructor information about yourself and the interprofessional context where you work. Create a Movenote that contains the following information: your name, current area of practice, interprofessional context, fun fact about you, and goal for course.

Movenote allows you to send a video message accompanied with a Power Point slide show. For this assignment your Movenote presentation should be 5-minutes or less. Please create 5 slides for this presentation. You should use your 5-minute narration to describe your slides in detail. Please focus 1-2 slides on information introducing yourself with the remainder of the slides focusing on your interprofessional work context and related communication needs.

When using Movenote it's best to complete your slides first in Power Point and then save the PP files as a pdf file before uploading to Movenote. For some reason pdf files work better in Movenote and the text & images don't move around when they're uploaded. You can sign up for Movenote at: http://www.movenote.com/. Movenote should take you less than a half hour to master.

Please listen to each other's Movenote messages. The discussion questions for week one will build on your Movenote messages. Be sure to introduce yourself at the beginning of your message since I have not met most of you.

• **Learn@UW & Group Discussion:** Weekly discussion questions will be posted by instructor and students. Questions will be posted by Tuesday and all responses will need to be posted by Sunday at midnight. Each student is required to post at least one primary comment that represents his/her position and/or thoughts about the discussion question. This primary post is to be approximately 200 words in length and contain at least one reference from a peer reviewed journal. Please read discussion questions closely as their might be slight modifications in the requirements for the posts depending on the specific question for the week.

As well, it is required that each student make 2 other comments/reactions/questions regarding the posts of colleagues (of approximately 50 words in length). These responses are expected to make a contribution to the discussion. At least one of your additional comments must include a reference from a peer-reviewed journal.

You are encouraged to participate to a greater extent on the discussion board questions. The above represents the minimum amount of participation to earn the allotted points.

Each student will lead or co-lead a minimum of two weeks of the synchronous discussion. The student facilitators must assign 1 to 2 additional readings for the class that must be distributed a minimum of one week prior to class. The student/s facilitator will send the instructor the outline for the assigned synchronous discussion by 11:59 the
day before. The discussion must build on the required foundational readings but may be taken in the direction of additional readings as desired by facilitators.

- **Slagle Lectures**: Each student will read, critique, and compare three Slagle lectures. You will compare and contrast the lectures considering aspects such as the communication of the purpose, effectiveness, organization, and style. See assignment guide for further details.

- **Interprofessional Presentation**: Each student will present a project/lecture related to their particular area of practice or capstone project to the class and a community partner. Class members will critique class presentations, audience members will provide feedback on the community partner presentation, and each student will provide a self-critique. See assignment guide for presentation details.

- **Professional Publication Manuscript**: Each student will produce a manuscript to be submitted to either a professional or academic publication. The manuscript topic should be directly related to your area of practice or capstone project and reflect effective communication in the format of the chosen publication format. See assignment guide for further details.

**Assignment Submission**

Unless otherwise stated, each assignment must be electronically submitted to the course website prior to class on the assigned due date. In order to ensure equitable grade assignment, all assignments must be turned in on the due date. **Assignments turned in late will not receive full credit.** For every day that an assignment is late, 10% of the student’s earned points for that assignment will be deducted. **Assignments will NOT be accepted more than one week late.**

**Guidelines for Assignment Format**

Unless otherwise stated on the assignment guidelines:

1. All assignments should be typed, double-spaced, and use a font size no smaller than 14 characters per inch (e.g. Verdana 10-point font or Times New Roman 12-point font).
2. Use a 1-inch margin on all sides.
3. Insert page number for all assignments that are longer than 1 page.
4. All assignments should be written professionally using full sentences and paragraphs as appropriate.
5. Except for assignments to be written as occupational therapy documentation or otherwise specified, following the guidelines in the APA manual for writing style, including, but not limited to, headings, number, table format, citations, and reference list.
6. Clear and concise communication is a critical skill for OTs. Adhere to all page and space limits on assignments. Portions of the assignments exceeding page/space limits will not be considered in grading.
VIII. Student Evaluation

Course grading is based on the successful completion of all assignments, and is broken down according to the following percentages and awarded points.

Final grade assignment will use the following scale:

<table>
<thead>
<tr>
<th>%</th>
<th>Grade</th>
</tr>
</thead>
<tbody>
<tr>
<td>94-100</td>
<td>A</td>
</tr>
<tr>
<td>90-93.99</td>
<td>AB</td>
</tr>
<tr>
<td>84-89.99</td>
<td>B</td>
</tr>
<tr>
<td>80-83.99</td>
<td>BC</td>
</tr>
<tr>
<td>70-79.99</td>
<td>C</td>
</tr>
</tbody>
</table>

IX. Schedule

<table>
<thead>
<tr>
<th>Week</th>
<th>Readings</th>
<th>Activity/ Assignment</th>
</tr>
</thead>
</table>
| Week 1: Welcome and Course Overview | **Readings:** Adult Learner: Chapters 1, 2, 3 & 5  
Interpersonal Relationships: Chapter 1 | 1. Identify a topic and interprofessional audience related to your practice area or OTD program goals where you will give your final presentation. Post topic, audience, and if appropriate the venue to the Discussion Board.  
2. Post Personal Bio  
3. Post Journal Entry  
4. Participate in learn@UW discussion questions/discussion  
5. Online Meet Up |
| Learning Theory and Models |                                              |                                                                                        |
| Week 2: Andragogical and Pedagogical | **Readings:** Adult Learner: Chapters 4, 6 | 1. Post Journal Entry  
2. Participate in learn@UW discussion questions/discussion |
<table>
<thead>
<tr>
<th>Approaches</th>
<th>Interpersonal Relationships: Chapters 2 and 3</th>
<th>Additional Student Assigned Readings: TBD</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Week 3:</strong> Andragogical Learning Principles and Analysis</td>
<td><strong>Readings:</strong></td>
<td>3. Online Meet Up and Student Facilitated Discussion</td>
</tr>
<tr>
<td>Introduction to Learning Styles</td>
<td>Adult Learner : Chapter 7</td>
<td></td>
</tr>
<tr>
<td>Communication as a Health Care Professional</td>
<td>Interpersonal Relationships: Chapters 9, 13, and 15</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Additional Student Assigned Readings: TBD</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Week 4: Perspectives on Andragogy</th>
<th>Readings:</th>
<th>1. Identify a topic and the professional publication format for final paper.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Professional Communication</td>
<td>Adult Learner : Chapter 9</td>
<td>2. Post Journal Entry</td>
</tr>
<tr>
<td></td>
<td>Interpersonal Relationships: Chapters 9</td>
<td>3. Participate in learn@UW discussion questions/discussion and Student Facilitated Discussion</td>
</tr>
</tbody>
</table>
| Week 5: Cognition and Learning | Readings: Adult Learner: Chapter 10  
Additional Student Assigned Readings: TBD | 1. Post Journal Entry  
2. Participate in learn@UW discussion questions/discussion  
3. Online Meet Up and Student Facilitated Discussion |
|---|---|---|
| **Week 6:** Development of Educational Information for Variable Populations  
Cultural Competency | Readings: Interpersonal Relationships: Chapter 11  
Additional Student Assigned Readings: TBD | 1. Post Journal Entry  
2. Participate in learn@UW discussion questions/discussion  
3. Online Meet Up and Student Facilitated Discussion |
| Week 7: Development of Educational Information for Variable Populations | Readings: Adult Learner: Chapters 13, 14  
Additional Student Assigned Readings: TBD | 1. Post Journal Entry  
2. Participate in learn@UW discussion questions/discussion  
3. Online Meet Up and Student Facilitated Discussion |
(continued) Understanding Health Literacy and its Barriers (CBM 2004-1). Current Bibliographies in Medicine 2004-1

Assessing and Developing Health Materials: Harvard School of Public Health
http://www.hsph.harvard.edu/healthliteracy/practice/innovative-actions/
and
http://www.hsph.harvard.edu/healthliteracy/additional-resources-for-creating-and-assessing-materials/

Additional Student Assigned Readings: TBD

<table>
<thead>
<tr>
<th>Week 8: Communicating Occupational Therapy</th>
<th>Readings:</th>
</tr>
</thead>
</table>

1. Post Journal Entry
2. Participate in learn@UW discussion questions/discussion
3. Online Meet Up and Student Facilitated Discussion
<table>
<thead>
<tr>
<th>Week</th>
<th>Course Title</th>
<th>Readings:</th>
<th>Additional Student Assigned Readings: TBD</th>
<th>Assignments:</th>
</tr>
</thead>
</table>
| Week 9: | Learning Contracts Competency Based Learning | Adult Learner : Chapters 15, 16 | Additional Student Assigned Readings: TBD | 1. Draft of Practice Publication Due  
2. Post Journal Entry  
3. Participate in learn@UW discussion questions/discussion  
4. Online Meet Up and Student Facilitated Discussion |
| Week 10: | Andragogy & Personal Learning Styles | Adult Learner : Chapter 17 | Additional Student Assigned Readings: TBD | 1. Post Journal Entry  
2. Participate in learn@UW discussion questions/discussion  
3. Online Meet Up and Student Facilitated Discussion  
4. Online Meet Up and Student Facilitated Discussion |
| Week 11: | Computer Based Instruction for the Adult Learner | Adult Learner : Chapter 18 Trujillo, L. G. (2007). Distance education pedagogy and instructional design and development for occupational therapy educational programs. Occupational therapy in health care, 21(1-2), 159-174. | Additional Student Assigned Readings: TBD | 1. Peer Feedback on Practice Publications Due:  
2. Post Journal Entry  
3. Participate in learn@UW discussion  
4. Discuss Peer Feedback and Publication Process |
2. Participate in learn@UW discussion questions/discussion  
3. Online Meet Up and Student Facilitated Discussion |
| Week 13: | Readings: | | | 1. Post Journal Entry |
| Applied Application of Principles Discussed | Three Self-Selected Slagle Lectures: TBD  | 2. Participate in learn@UW discussion questions/discussion  
|                                             | Topic/Communication                        | 3. Online Meet Up and Student Facilitated Discussion  |
|                                             | Additional Student Assigned Readings: TBD  |  |

| Week 14: Final Presentations | Readings: None | 1. Post Journal Entry  
2. Participate in learn@UW discussion questions/discussion  
3. Online Meet Up for Final Presentations  |
| Week 15: Closing Discussion Slagle Lectures | Readings: None | 1. Final Practice Publication Due  
2. Interprofessional Presentation Due along with feedback from audience member  
3. Post Journal Entry  
4. Participate in learn@UW discussion questions/discussion  
5. Online Meet Up and Slagle Lecture Facilitation |
Course Syllabus
Occ Ther 872
Using Information to Optimize Practice
Spring 2
3 credits

I. Course Instructor:
Ruth Benedict, DrPH, OTR
Associate Professor, Occupational Therapy Program
608-262-0543
rbenedict@education.wisc.edu
Office hours/Chat hours: Tuesdays 1:15-2:15
Or By Appointment

The course instructor will be available online during regularly scheduled office hours during
which you may use the instant messaging/chat feature to communicate. If you are not able to
meet during scheduled office hours, you may arrange an individual appointment with the course
instructor or send questions via email. Email is most effective for questions that are relatively
simple (e.g., verifying factual information). If your questions relate to conceptual issues (e.g.,
explaining course content or assignments), then direct communication is encouraged.

II. Course Description & Objectives

Course Description
Research in the practice arena presents opportunities and challenges for practitioners.
Controlled and systematic collection of data for the purpose of applied inquiry can promote the
prevention, diagnosis, and effective treatment of conditions encountered in occupational therapy
practice. Specifically, the field of informatics which involves the acquisition, storage, retrieval,
and use of information to guide problem solving and decision making, can be a powerful source
for practice-based research. It incorporates the design and optimization of information systems
to generate data which can be used to improve practice, public health initiatives and research.
Tools supporting this broad area of inquiry include computers, mobile technologies, practice
guidelines, formal terminologies, and information and communication systems. More
specifically, informatics applies health care, education or other systematically collected data to
practice to enhance identification, referral, interventions or program planning. In this course,
students will learn the key principles, methods and processes for generating, storing and
retrieving relevant practice information at both the individual and population level. The benefits
and issues associated with the electronic storage of information will be discussed. Students will
also explore the ethical issues surrounding electronic records, the role of standards in the
development and use of systems, and the laws and policies governing the compilation and use
of personal data. The course will present strategies and methods for generating, accessing and
analyzing data from public and proprietary electronic sources. Students will build skills in
developing practice-relevant questions which can be answered using available data. An
introduction to appropriate designs, data management procedures and statistical analysis tools
will provide the foundation for completing a project using information available in the practice
setting.

Course Objectives
Upon course completion, the student will be able to:

1. Discuss the discipline of informatics, its history, application in health, education and
   community environments, and emerging trends.
2. Identify various information systems, technologies and applications utilized in the context
   of practice.
3. Communicate the value of administrative, clinical, and decision-support technologies in
   improving organizational performance.
4. Articulate the strengths, challenges, purpose and impact of informatics on practice.
5. Debate the advantages and disadvantages of electronic data collection for clients,
   populations and providers, including ethical considerations.
6. Discuss the factors influencing adoption and use of various information systems and
   technologies in practice settings.
7. Identify information that can be used to support Evidence Based Practice and discuss
   the advantages and disadvantages of relying on secondary data.
8. Apply knowledge of informatics, data management and analysis to answering a practice-
   related question.

III. Prerequisite Knowledge

Academic Knowledge
Degree in Occupational Therapy, Master’s degree in OT or equivalent per Admissions
requirements

Minimum Technical Skills
1. Using the UW-Madison learning management system
2. Using email with attachments
3. Creating and submitting files in commonly used word
   processing program formats; Copying and pasting content;
   Using review and tracking features to edit and comment
   within documents
5. Downloading and installing software
6. Using spreadsheet programs
IV. Course Operation

Class Meeting
This course is offered in an online format. Students may be required to participate in synchronous or asynchronous online discussions or presentations of material. See course schedule for detail.

You are expected to have completed all assigned materials in advance of the relevant class session. If an extenuating circumstance arises and you are unable to attend a scheduled synchronous lecture, discussion or activity, inform the course instructor in advance so that adjustments to the planned activity structure can be made.

Course Format
This class will use online lectures, videos, interactive discussions, readings, and assignments to accomplish course objectives.

V. Course Policies

Academic Honesty and Integrity
You are required to adhere to all University, School of Education, Department of Kinesiology and OT Program standards regarding academic integrity. If you are not familiar with these standards, you are responsible for accessing, reading and understanding them.

University academic standards are outlined in Chapter 14 of the Wisconsin Administrative Code (UWS 14). Further information detailing University policies and procedures related to these standards is available at the Dean of Students Office, 75 Bascom Hall. Online documents include:

Student Code of Conduct
(http://www.wisc.edu/students/saja/misconduct/misconduct.html),

Academic Misconduct
(http://www.wisc.edu/students/saja/misconduct/academic_misconduct.html), and

Student Academic Misconduct Policy & Procedures

OT Program standards are defined in OT Student Handbook
(link to be added when Handbook is complete)

As members of a scholarly community dedicated to healthy intellectual development, students and faculty are expected to share responsibility for maintaining high standards of honesty and integrity in their academic work. Each student should reflect this sense of responsibility toward the community by submitting work that is a product of his or her own effort in a particular course, unless the instructor has directed otherwise.

The following are examples of violations of standards for academic honesty and are subject to sanction: Using resources beyond those specified by the instructor during exams; submitting
collaborative work as one’s own; falsifying records, achievements, field or laboratory data, or other course work; stealing examinations or course materials; submitting work previously submitted in another course, unless specifically approved by the present instructor; falsifying documents or signing an instructor’s or administrator’s name to any document or form; plagiarism, or aiding in any of the above actions.

**Quoting and Paraphrasing**
To assist you in making certain that work you submit includes proper recognition of sources that you have used, a helpful resource is *Quoting and Paraphrasing Sources* from the UW Writing Center’s *Writer’s Handbook* (http://www.wisc.edu/writing/Handbook/QuotingSources.html). It clarifies standards for using references.

**Collaboration**
Group study and discussion can substantially enhance student learning and the subject matter covered in this course frequently lends itself well to such group consideration. You are permitted – in fact, you are encouraged – to discuss course material with your classmates, your practice colleagues and others. However, with the exception of lecture notes or when specifically noted by the course instructor, you are not permitted to share materials related to course assignments, background questions, papers, or exams. This includes all draft and all finished work that you produce, in written and/or electronic form. If you have any questions regarding this policy in general or how it applies to a specific situation, you are responsible for asking the course instructor for clarification before you collaborate.

**Academic Dishonesty**
Academic Dishonesty during any component of the course may result in a course letter grade of F, and/or other disciplinary action as determined by the course coordinators. All violations of Academic Standards will be vigorously pursued since violation of the Academic Standards indicates serious character flaws incompatible with professional education.

**Assignment Submission**
All assignments should be completed by the assigned due date and submitted according to instructions in the assignment guidelines. Points will be deducted for late assignments. Reading assigned material prior to class lectures or discussions is essential to understanding course concepts and demonstrating acquired knowledge during assignments.

**Class Decorum**
Behavior that is appropriate in a health professional program is the same as behavior that is appropriate in professional practice: respectful, attentive, and well-mannered. Passive incivilities (e.g., lateness, inattention), disruptions (e.g., cell phone use, conversations during class), and overt incivilities (e.g., vulgarity, insulting comments, physical threats) all indicate disrespect. Such unprofessional behavior – whether directed toward class colleagues or course staff – is not acceptable and will be dealt with as necessary.

**Course Communication**
Email and news or information postings on the course webpage will be the primary means for communication. It is imperative that you check these sources regularly. Faculty will respond to student emails as quickly as possible and generally within ____ hours. Communications regarding any changes in course assignments, grading, or scheduling may be done during synchronous class discussion and will be provided in a written form as well.

**Accommodations**

It is the policy of the instructor of this course and the University of Wisconsin-Madison to provide an accessible, accommodating and supportive teaching and learning environment for all students. Students requiring special accommodation related to a disability should contact McBurney Disability Resource Center (702 W. Johnson Street, Suite 2104, Madison, WI 53715; website: [http://www.mcburney.wisc.edu/](http://www.mcburney.wisc.edu/); phone: 608-263-2741; text: 608-225-7956; fax: 608-265-2998; email: mcburney@studentlife.wisc.edu) for information about services and campus-related disability policies and to determine eligibility for services.

If you are requesting any accommodations in this class on the basis of disability, you should schedule an office appointment by email or phone with the course instructor within the first week of the semester. You may choose to maintain the confidentiality of your request by approaching the course coordinator during office hours to discuss accommodation needs. student should provide the instructor a copy of his/her McBurney Center VISA or accommodations may be mutually agreed upon between the instructor and student.

**Rescheduling Course Activities Due To Student Absence**

No exam, exercise or assignment will be rescheduled, except under extenuating circumstances. If extenuating circumstances occur (e.g., documented illness, hospitalization, official school business, death in family), the course instructor might elect to reschedule an assignment, exercise, or exam for the affected student. Rescheduling will be considered only if you have notified the course instructor prior to the relevant due date. At a minimum, you (or a friend, roommate, family member, etc.) must email the course instructor regarding the situation. No rescheduled activity or due date will be rescheduled a second time.

**Technology**

Students must comply with all applicable laws as well as with all University and School policies with regard to appropriate use of information technology and Internet content. They must exercise professional judgment when using information technology and take full responsibility for all electronic materials that they publish, transmit or possess. Students may not upload, post or transmit (including via email and social networking sites) content that is deemed inappropriate including any material that may be considered fraudulent, harassing, defamatory, or obscene; that is invasive of another’s privacy; that promotes illegal behavior, refers to alcohol use, or promotes any commercial interest; or that accesses or distributes unauthorized course material. Students may not access, install, use or share any materials (e.g. written materials, images, movies) that violate applicable copyrights or license agreements. Students may not disrupt or interfere with the work of other students, faculty, or staff.
**Netiquette**

As a respectful community of adult learners it is important to remember some basic netiquette principles:

- In an on-line class, our main mode of communication is written. Therefore, it is important that you re-read your written communication. The "tone" is a very important part of electronic communication. When you read your message out loud, does it sound the way you would speak to another student in the classroom?

- When writing a reply posting, delete all extraneous information except the specific phrase, sentence, or comment to which you are replying. This not only helps the reader know what you are replying to, but also helps the reader save time by not wading through a long post, or worse, the entire included thread. It also makes it quicker for classmates to download or print a particular posting.

- Be specific, especially when asking questions.

- Humor can be difficult to convey in text, so make sure everyone realizes when you are trying to be funny. It is easy for messages to be misinterpreted since there are no physical gestures or voice inflections that accompany the text.

- Assume the best intentions of others in the class and be forgiving when you think that the tone of someone's post is offensive. It is easy to misread the tone of someone's written communication. If in doubt, ask an open, honest question about what the person meant so that you can clarify before making assumptions that damage your perception of your colleague.

- Stick to standard fonts -- Times New Roman, Arial, Helvetica, 12 or 14 pt. -- and colors -- black or blue.

- **DON'T WRITE THE ENTIRE POSTING WITH YOUR CAPS LOCK ON. USE OF CAPS IS CONSIDERED YELLING IN ONLINE COMMUNICATION.**

**Grammar, Spelling and Fonts**

Your writing style should not detract from the message. Clear communication is an essential skill for all professionals. Slang, abbreviations or incorrect grammar do not demonstrate professionalism. Use the spell check in your word processing program.

**Grievance Procedures**

Students who have a concern about fair treatment may convey their concern and receive a prompt hearing of their grievance. Complaints may be related to grades, classroom treatment, program admission, or other issues. A detailed description of School of Education Procedures may be found at: [http://handbook.education.wisc.edu/GrievancePolicy.ashx](http://handbook.education.wisc.edu/GrievancePolicy.ashx)

**VI. Resource Materials**

**Required Texts**

Other Required Readings
Will be posted on the course website throughout course.

Course Website
The course has a website which provides access to important class documents such as the syllabus, assignment guides, case studies, and links to resources. Grades will also be posted on the site. All students enrolled in the course should be listed on the site. Please check that you have access to the website within the first few days of class opening. If you are not able to log on, notify the instructor as soon as possible. The website will be updated regularly and, therefore, it is important to check on a regular basis.

Technical Support
DoIT's Help Desk is available via LiveChat, phone and email for 19 hours a day, seven days a week, for walk-in customers eight hours a day, five days a week, and via a Web knowledgebase at all hours. The Help Desk knowledgebase has more than 3,000 documents, which were accessed online more than three million times during the year. See https://kb.wisc.edu/helpdesk/
Phone: 608-264-4357
Email: help@doit.wisc.edu (Response may not be immediate)

To chat with the Help Desk staff, click the LiveChat icon to initiate a chat session. Then, simply fill out the short form to start chatting with a Help Desk technician.

LiveChat is available from 8am-10pm, 7 days a week (excluding holidays)
No account information may be given out via LiveChat
Users of LiveChat must be affiliated with the UW and have a valid NetID
If you have problems initiating a LiveChat session, or need assistance with your NetID, password, or other account information, please call the DoIT Help Desk at +1-608-264-4357 (264-HELP)

Course specific Technology questions may be directed to:

Ruth Benedict, DrPH, OTR, Associate Professor
608-262-0543
rbenedict@education.wisc.edu

Division of Continuing Studies
608-262-1156
info@dcs.wisc.edu
## VII. Assignments

<table>
<thead>
<tr>
<th>Assignment</th>
<th>Due Date</th>
<th>Percentage of Grade</th>
</tr>
</thead>
<tbody>
<tr>
<td>Homework (5)</td>
<td></td>
<td>25% (5% each)</td>
</tr>
<tr>
<td>1. Research and create a list of information sources available in a practice environment.</td>
<td>Week 2</td>
<td></td>
</tr>
<tr>
<td>2. Categorize within selected information taxonomy the data types and describe a potential application to address a practice issue.</td>
<td>Week 4</td>
<td></td>
</tr>
<tr>
<td>3. Case study discussing the legal and ethical implications of a practice scenario.</td>
<td>Week 6</td>
<td></td>
</tr>
<tr>
<td>4. Identify and describe one available practice dataset including the types of information in the dataset (i.e. variables), the requirements for use of the data, a critique of the strengths and limitations, and one practice question that the data could potentially answer.</td>
<td>Week 8</td>
<td></td>
</tr>
<tr>
<td>5. Conduct an appropriate analysis and produce a visual representation for assigned set of data.</td>
<td>Week 10</td>
<td></td>
</tr>
<tr>
<td>Asynchronous Online Discussion</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Preparation (Depth &amp; Breadth of comments)</td>
<td>Weekly</td>
<td>15%</td>
</tr>
<tr>
<td>- Participation (Frequency)</td>
<td></td>
<td>5%</td>
</tr>
<tr>
<td>Knowledge &amp; Concept Quizzes</td>
<td></td>
<td>10%</td>
</tr>
<tr>
<td>Practice Question</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Write a problem statement and develop a relevant question related to a structural, process or outcome goal which can be answered using available data in your practice setting</td>
<td>Week 7</td>
<td>15%</td>
</tr>
<tr>
<td>Final analysis project</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Analyze available data to answer the question and address the problem noted above. Using the results, discuss the implications and develop recommendations for practice.</td>
<td>Week 15</td>
<td>30%</td>
</tr>
</tbody>
</table>

| Total                                   |            | 100%                |

### Assignment Submission

Unless otherwise stated, each assignment must be electronically submitted to the course website prior to class on the assigned due date. In order to ensure equitable grade assignment,
all assignments must be turned in on the due date. **Assignments turned in late will not receive full credit.** For every day that an assignment is late, 10% of the student’s earned points for that assignment will be deducted. **Assignments will NOT be accepted more than one week late.**

**Guidelines for Assignment Format**

Unless otherwise stated on the assignment guidelines:

1. All assignments should be typed, double-spaced, and use a font size no smaller than 14 characters per inch (e.g. Verdana 10-point font or Times New Roman 12-point font).
2. Use a 1-inch margin on all sides.
3. Insert page number for all assignments that are longer than 1 page.
4. All assignments should be written professionally using full sentences and paragraphs as appropriate.
5. Except for assignments to be written as occupational therapy documentation or otherwise specified, following the guidelines in the APA manual for writing style, including, but not limited to, headings, number, table format, citations, and reference list.
6. Clear and concise communication is a critical skill for OTs. Adhere to all page and space limits on assignments. Portions of the assignments exceeding page/space limits will not be considered in grading.

**VIII. Student Evaluation**

Course grading is based on the successful completion of all assignments, and is broken down according to the following percentages and awarded points.

Final grade assignment will use the following scale:

<table>
<thead>
<tr>
<th>%</th>
<th>Grade</th>
</tr>
</thead>
<tbody>
<tr>
<td>94-100</td>
<td>A</td>
</tr>
<tr>
<td>90-93.99</td>
<td>AB</td>
</tr>
<tr>
<td>84-89.99</td>
<td>B</td>
</tr>
<tr>
<td>80-83.99</td>
<td>BC</td>
</tr>
<tr>
<td>70-79.99</td>
<td>C</td>
</tr>
</tbody>
</table>
### IX. Schedule

<table>
<thead>
<tr>
<th>Date</th>
<th>Topic &amp; Readings</th>
<th>Activity/ Assignment</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><strong>Objectives:</strong>&lt;br&gt;1. To outline major policy changes in the health, education and social arenas during the dawning of the “Information Age”.&lt;br&gt;2. To describe the evolution of informatics and the challenges and opportunities the field presents for enhancing the OT health and education missions.&lt;br&gt;3. To define major categories of information analytics and their primary uses.&lt;br&gt;4. To discuss the challenges and opportunities associated with the analysis of health and educational data.</td>
<td></td>
</tr>
<tr>
<td>Week 2</td>
<td><strong>Data &amp; Information Systems</strong>&lt;br&gt;<strong>Readings:</strong>&lt;br&gt;Text: Burke: Chapter 3 - The Four Enterprise Disciplines of Health Analytics&lt;br&gt;Brown, Patrick &amp; Pasupathy: Chapter 2 – Biomedical Vocabulary and Standards: Information Building Blocks&lt;br&gt;E-articles: Whyte, J., Dijkers, M. P., Hart, T., Zanca, J. M., Packel, A., Ferraro, M., &amp; Tsouris, T. (2014). Development of a Theory-Driven Rehabilitation Treatment Taxonomy: Conceptual Issues. <em>Archives of Physical Medicine and Rehabilitation</em>, 95(1), S24-S32.e22. doi: 10.1016/j.apmr.2013.05.034</td>
<td><strong>Activities:</strong>&lt;br&gt;- Discussion&lt;br&gt;- Group Project: Identifying classification systems or taxonomies that can be applied to practice&lt;br&gt;- Homework 1 Due: Research and create a list of information sources available in a practice environment&lt;br&gt;<strong>Discussion Prep:</strong> Identify and interview a Health Information Management or IT professional in a practice environment</td>
</tr>
</tbody>
</table>

Objectives:
1. To explain the characteristics of a concept-based vocabulary and its advantages and disadvantages for information systems data gathering and analysis.
2. To describe the disciplines involved in information analytics and the competencies required for successful integration, analysis and application of data.
3. To identify and apply taxonomies used by OT or a related discipline to the gathering of relevant assessment, treatment, outcome or management data.

Week 3 Ethical Issues in Information Use
Readings:
E-articles:
“The Ethics of Electronic Health Records” at: http://www.clinicalcorrelations.org/?p=2211
Review:

Objectives:
1. To state the strengths and limitations of complex information systems and the ethical challenges inherent in their use.
2. To apply ethical principles of occupational therapy and inter-professional practice to the appropriate use of sensitive personal information.

Activities:
- Review assigned videos with case examples of ethical issues
- Identify and share your own case study of an ethical issue encountered in practice involving client information

Discussion Prep:
Critically appraise the case study you share using the ethical principles of Beneficence, Non-maleficence, Autonomy and Confidentiality, Social Justice, Procedural Justice, Veracity, and Fidelity

Week 4 Privacy, HIPPA & FERPA
Readings:
Text:
Brown, Patrick & Pasupathy: Chapter 13 – Health Information Privacy and Security
E-Article:
E-Resources:
UW-Madison Human Research Protection Program (http://grad.wisc.edu/respolcomp/hrpp/)

Objectives:
1. To define privacy, security and safety with regards to practice in the health, social and educational systems.

Activities:
- Discussion
- Homework 2 Due: Categorization/taxonomy of the data types and potential application to address a practice issue

Discussion Prep:
Complete CITI Human Subjects Research & HIPPA training
2. To state the principles of fair information practices and argue their importance.
3. To describe the role of an IRB in practice-based research and the principles of protecting human subjects.
4. To discuss the safeguards of HIPAA and FERPA Rules and the potential risks they are intended to address.
5. To identify the risks to various stakeholders when accessing and analyzing health and educational data.

**Week 5**

**The Digital Data Revolution**

**Readings:**

**Text:**
- *Burke:*
  - Chapter 4 – Dealing with Data
- *Brown, Patrick & Pasupathy:*
  - Chapter 3 – Selection and Implementation of EMR Systems

**E-articles:**
- Explore “Health Data Interactive” at: [http://www.cdc.gov/nchs/hdi.htm](http://www.cdc.gov/nchs/hdi.htm)
- Watch Video: [Hans Rosling: The best stats you’ve ever seen](http://www.ted.com/playlists/77/11_must_see_ted_talks)

**E-Resources:**

**Objectives:**

1. To identify the types and levels of digital data having the potential to inform decisions in clinical, administrative, financial and behavior change case scenarios.
2. To state the strengths and weaknesses of digital information, considerations in the selection and design of electronic records systems and their application in practice.
3. To use publicly available data to answer a practice-related question.

**Activities:**
- Review assigned videos on EMR systems and their success or failure in creating data repositories.
- **Discussion Prep:** Conduct a search of the Internet to identify relevant publicly available data for your practice area.

**Week 6**

**Quality Care: Structure, Process and Outcomes**

**Text:**
- *Burke:*
  - Chapter 5 – BEST Care, First Time, Every Time
  - Chapter 7 - Health Outcomes Analysis
  - Chapter 12 – Quality & Safety
- *Brown, Patrick & Pasupathy:*
  - Chapter 8 – Knowledge-based Clinical Decision Making

**E-articles:**

**Activities:**
- Online Lecture
- Homework 3 Due: Ethics case study
- **Discussion Prep:** Gather information on the systems, standards and practices used in a familiar practice setting to determine quality of care.

**Objectives:**
1. To define the components of quality care.
2. To discuss the potential of information systems for measuring quality of care.
3. To identify key performance indicators that can contribute to the evaluation of the structure, processes, and outcomes of care.

### Week 7  Measuring Structure & Processes – Accountability and the Business Model

**Text:**
*Brown, Patrick & Pasupathy:*
Chapter 7 – The Coming of the Corporation: Transforming Clinical Work Processes

**E-article:**


**Objectives:**
1. To state the role of clinical guidelines, accepted practices and organizational policies and procedures in promoting standards of care.
2. To discuss the issues surrounding the measurement of quality care in the health and education environments.
3. To identify areas of practice where quality of care is in need of improvement and possible tools for measurement of change.

### Activities:
- Knowledge & concept quiz; individual and group responses
- Watch “Measuring Health Care Quality Tutorial” @ Kaiser Family Foundation Website (http://kff.org/interactive/measuring-health-care-quality-tutorial/)
- Watch Tools and Techniques for Quality Improvement in Healthcare (https://www.youtube.com/watch?v=e_BiY351Zx8)

**Discussion Prep:**
Gather background information and prepare your Practice Question assignment. Use the discussion forum for peer feedback on the assignment and to brainstorm ideas for appropriate quality measures.

### Week 8  Basic Analytic Skills: Descriptive & Inferential Statistics, Estimation & Hypothesis Testing

**Activities:** (Team-based learning)
<table>
<thead>
<tr>
<th>Week 9</th>
<th>Visual Analytics</th>
</tr>
</thead>
</table>
| **Text:** | *Portney & Watkins*  
Chapter 17 - Descriptive Analysis  
Chapter 18 - Statistical Inference  
Chapter 19 - Comparing Two Means: The t-test  
**Objectives:**  
1. To describe the power of statistics for programmatic assessment, planning, and decision making.  
2. To hypothesize, measure and test changes associated with provision of OT and inter-professional services.  
3. To apply knowledge generated to the improvement of structural, process or outcome objectives. |
| **Activities:** | (Team-based learning)  
- Knowledge & concept quiz; individual and group responses  
- Using the case example provided, work in teams to analyze data using descriptive and inferential statistics. Apply the results to recommend changes in programming or treatment.  
- Homework 4 Due: Description of dataset  
**E-articles:**  
**Objectives:**  
1. To describe the power of visual analytics for assessment, planning, and decision making.  
2. To convert data to graphical representations that support visualization and analysis.  
3. To produce a representation of data that can be used to communicate information regarding a practice issue to an appropriate audience.  
**E-articles:**  

<table>
<thead>
<tr>
<th>Week 10</th>
<th>Predictive Analytics</th>
</tr>
</thead>
</table>
| **Text:** | *Brown, Patrick & Pasupathy:*  
Chapter 9 – Predictive Analytics in Knowledge Management  
**E-articles:**  
| **Activities:** | (Team-based learning)  
- Watch "Introduction to Predictive Analytics"@ [https://www.youtube.com/watch?v=DJS-WvHmoB0](https://www.youtube.com/watch?v=DJS-WvHmoB0)  
- From the literature, identify at least 2 examples of the use of predictive analytics in OT or inter-professional practice. As a team, critique the examples, using principles of
### Objectives:
1. To state principles of predictive analytics for assessment, planning, and decision making.
2. To apply the principles to specific case examples.
3. To generate ideas for the use of predictive analytics to enhance service delivery.

### Weeks 11-13
**Theory to Practice**

**Activities:**
- Students will work with stakeholders (e.g. clients, colleagues, managers, administrators) to answer their practice question using appropriate data. Principles and concepts of informatics will be applied to identify effective tools and strategies for measurement, analysis and presentation.

### Week 14
**Future Trends in Practice Analytics**

**Text:**
- *Burke:*
  - Chapter 13 – The New Research and Development
- *Brown, Patrick & Pasupathy:*
  - Chapter 15 – Health Systems in an Information Age

**E-article:**

**Activities:**
- Online guest discussant with expertise in cutting edge practice analytics for OT or inter-professional practice
- Updates/revisions to professional development plan

### Week 15
**Presentation of Results**

**Activities:**
- Students will present results of their selected analytic project.
Course Syllabus
Occ Ther 873
Advanced Outcome Measurement in Occupational Therapy
Fall 2
3 credits

I. Course Instructor:
   Dorothy Farrar Edwards, PhD
   608-262-7421
dfrdwards@wisc.edu
   Office hours/Chat hours: By Appointment

   The course instructor will be available online during regularly scheduled office hours during which you may use the instant messaging/chat feature to communicate. If you are not able to meet during scheduled office hours, you may arrange an individual appointment with the course instructor or send questions via email. Email is most effective for questions that are relatively simple (e.g., verifying factual information). If your questions relate to conceptual issues (e.g., explaining course content or assignments), then direct communication is encouraged.

II. Course Description & Objectives

   Course Description
   Occupational therapy practice and research rely on outcome measures to document efficacy and effectiveness of clinical programs and interventions. OT XXX will explore quality assurance in OT service delivery (including consumer satisfaction) and objective and subjective functional and occupational performance measures of OT interventions. The course will include an overview of principles of measurement (reliability, validity and clinical utility) This course will also examine general themes and trends in healthcare outcomes research as well as issues germane to specific areas of OT practice. The course will also review the new measurement “toolboxes” such as the NIH Toolbox developed to standardize assessment and outcome measurement in many areas of biomedical research. Strategies for assessing the psychometric properties and clinical utility of a variety of outcomes measures are reviewed. In this course, students will identify and evaluate the current state of measurement in their area and then develop a comprehensive plan for measuring outcomes needed to support evidence-based practice related decisions and improvements in their practice setting.
Course Objectives
Upon course completion, the student will be able to:

1. Identify and explain the role of outcome measures in assuring quality of OT services and efficacy of OT interventions across settings, populations and interventions.
2. Identify the domains of the World Health Organization ICF (International Classification of Function) Model most relevant for evaluating Occupational Therapy practice.
3. Describe the conceptual similarities and differences of efficacy and effectiveness.
4. Describe the measurement properties of objective and subjective measures of function, occupational performance and quality of life.
5. Evaluate the reliability, validity and clinical utility of objective and subjective measures of function, occupational performance and quality of life.
6. Identify appropriate outcome measures for evaluating service quality and effectiveness of interventions in a specific area of practice.
7. Develop an outcome measurement plan for a specific area of practice.

III. Prerequisite Knowledge

Academic Knowledge
Degree in Occupational Therapy, Master’s degree in OT or equivalent per Admissions requirements

Minimum Technical Skills
1. Using the UW-Madison learning management system
2. Using email with attachments
3. Creating and submitting files in commonly used word processing program formats; Copying and pasting content; Using review and tracking features to edit and comment within documents
5. Downloading and installing software
6. Using spreadsheet programs

IV. Course Operation

Class Meeting
This course is offered in an online format. Students may be required to participate in synchronous or asynchronous online discussions or presentations of material. See course schedule for detail.

You are expected to have completed all assigned materials in advance of the relevant class session. If an extenuating circumstance arises and you are unable to attend a scheduled synchronous lecture, discussion or activity, inform the course instructor in advance so that adjustments to the planned activity structure can be made.
Course Format
This class will use online lectures, videos, interactive discussions, readings, and assignments to accomplish course objectives.

V. Course Policies

Academic Honesty and Integrity
You are required to adhere to all University, School of Education, Department of Kinesiology and OT Program standards regarding academic integrity. If you are not familiar with these standards, you are responsible for accessing, reading and understanding them.

University academic standards are outlined in Chapter 14 of the Wisconsin Administrative Code (UWS 14). Further information detailing University policies and procedures related to these standards is available at the Dean of Students Office, 75 Bascom Hall. Online documents include:
Student Code of Conduct (http://www.wisc.edu/students/saja/misconduct/misconduct.html),
Academic Misconduct (http://www.wisc.edu/students/saja/misconduct/academic_misconduct.html), and
OT Program standards are defined in OT Student Handbook (link to be added when Handbook is complete)

As members of a scholarly community dedicated to healthy intellectual development, students and faculty are expected to share responsibility for maintaining high standards of honesty and integrity in their academic work. Each student should reflect this sense of responsibility toward the community by submitting work that is a product of his or her own effort in a particular course, unless the instructor has directed otherwise.

The following are examples of violations of standards for academic honesty and are subject to sanction: Using resources beyond those specified by the instructor during exams; submitting collaborative work as one’s own; falsifying records, achievements, field or laboratory data, or other course work; stealing examinations or course materials; submitting work previously submitted in another course, unless specifically approved by the present instructor; falsifying documents or signing an instructor’s or administrator’s name to any document or form; plagiarism, or aiding in any of the above actions.

Quoting and Paraphrasing
To assist you in making certain that work you submit includes proper recognition of sources that you have used, a helpful resource is Quoting and Paraphrasing Sources from the UW Writing Center’s Writer’s Handbook (http://www.wisc.edu/writing/Handbook/QuotingSources.html). It clarifies standards for using references.
Collaboration
Group study and discussion can substantially enhance student learning and the subject matter covered in this course frequently lends itself well to such group consideration. You are permitted – in fact, you are encouraged – to discuss course material with your classmates, your practice colleagues and others. However, with the exception of lecture notes or when specifically noted by the course instructor, you are not permitted to share materials related to course assignments, background questions, papers, or exams. This includes all draft and all finished work that you produce, in written and/or electronic form. If you have any questions regarding this policy in general or how it applies to a specific situation, you are responsible for asking the course instructor for clarification before you collaborate.

Academic Dishonesty
Academic Dishonesty during any component of the course may result in a course letter grade of F, and/or other disciplinary action as determined by the course coordinators. All violations of Academic Standards will be vigorously pursued since violation of the Academic Standards indicates serious character flaws incompatible with professional education.

Assignment Submission
All assignments should be completed by the assigned due date and submitted according to instructions in the assignment guidelines. Points will be deducted for late assignments. Reading assigned material prior to class lectures or discussions is essential to understanding course concepts and demonstrating acquired knowledge during assignments.

Class Decorum
Behavior that is appropriate in a health professional program is the same as behavior that is appropriate in professional practice: respectful, attentive, and well-mannered. Passive incivilities (e.g., lateness, inattention), disruptions (e.g., cell phone use, conversations during class), and overt incivilities (e.g., vulgarity, insulting comments, physical threats) all indicate disrespect. Such unprofessional behavior – whether directed toward class colleagues or course staff – is not acceptable and will be dealt with as necessary.

Course Communication
Email and news or information postings on the course webpage will be the primary means for communication. It is imperative that you check these sources regularly. Faculty will respond to student emails as quickly as possible and generally within ____ hours. Communications regarding any changes in course assignments, grading, or scheduling may be done during synchronous class discussion and will be provided in a written form as well.

Accommodations
It is the policy of the instructor of this course and the University of Wisconsin-Madison to provide an accessible, accommodating and supportive teaching and learning environment for all students. Students requiring special accommodation related to a disability should contact McBurney Disability Resource Center (702 W. Johnson Street, Suite 2104, Madison, WI 53715; website: http://www.mcburney.wisc.edu/; phone: 608-263-2741; text: 608-225-7956; fax: 608-
265-2998; email: mcburney@studentlife.wisc.edu) for information about services and campus-related disability policies and to determine eligibility for services.

If you are requesting any accommodations in this class on the basis of disability, you should schedule an office appointment by email or phone with the course instructor within the first week of the semester. You may choose to maintain the confidentiality of your request by approaching the course coordinator during office hours to discuss accommodation needs. Student should provide the instructor a copy of his/her McBurney Center VISA or accommodations may be mutually agreed upon between the instructor and student.

Rescheduling Course Activities Due To Student Absence
No exam, exercise or assignment will be rescheduled, except under extenuating circumstances. If extenuating circumstances occur (e.g., documented illness, hospitalization, official school business, death in family), the course instructor might elect to reschedule an assignment, exercise, or exam for the affected student. Rescheduling will be considered only if you have notified the course instructor prior to the relevant due date. At a minimum, you (or a friend, roommate, family member, etc.) must email the course instructor regarding the situation. No rescheduled activity or due date will be rescheduled a second time.

Technology
Students must comply with all applicable laws as well as with all University and School policies with regard to appropriate use of information technology and Internet content. They must exercise professional judgment when using information technology and take full responsibility for all electronic materials that they publish, transmit or possess. Students may not upload, post or transmit (including via email and social networking sites) content that is deemed inappropriate including any material that may be considered fraudulent, harassing, defamatory, or obscene; that is invasive of another’s privacy; that promotes illegal behavior, refers to alcohol use, or promotes any commercial interest; or that accesses or distributes unauthorized course material. Students may not access, install, use or share any materials (e.g. written materials, images, movies) that violate applicable copyrights or license agreements. Students may not disrupt or interfere with the work of other students, faculty, or staff.

Netiquette
As a respectful community of adult learners it is important to remember some basic netiquette principles:

- In an on-line class, our main mode of communication is written. Therefore, it is important that you re-read your written communication. The “tone” is a very important part of electronic communication. When you read your message out loud, does it sound the way you would speak to another student in the classroom?
- When writing a reply posting, delete all extraneous information except the specific phrase, sentence, or comment to which you are replying. This not only helps the reader know what you are replying to, but also helps the reader save time by not wading through a long post, or worse, the entire included thread. It also makes it quicker for classmates to download or print a particular posting.
Be specific, especially when asking questions.
Humor can be difficult to convey in text, so make sure everyone realizes when you are trying to be funny. It is easy for messages to be misinterpreted since there are no physical gestures or voice inflections that accompany the text.
Assume the best intentions of others in the class and be forgiving when you think that the tone of someone's post is offensive. It is easy to misread the tone of someone's written communication. If in doubt, ask an open, honest question about what the person meant so that you can clarify before making assumptions that damage your perception of your colleague.
Stick to standard fonts -- Times New Roman, Arial, Helvetica, 12 or 14 pt. -- and colors -- black or blue.
DON'T WRITE THE ENTIRE POSTING WITH YOUR CAPS LOCK ON. USE OF CAPS IS CONSIDERED YELLING IN ONLINE COMMUNICATION.

Grammar, Spelling and Fonts
Your writing style should not detract from the message. Clear communication is an essential skill for all professionals. Slang, abbreviations or incorrect grammar do not demonstrate professionalism. Use the spell check in your word processing program.

Grievance Procedures
Students who have a concern about fair treatment may convey their concern and receive a prompt hearing of their grievance. Complaints may be related to grades, classroom treatment, program admission, or other issues. A detailed description of School of Education Procedures may be found at: http://handbook.education.wisc.edu/GrievancePolicy.ashx

VI. Resource Materials

Recommended Texts
Kane, R. (2010). Conducting Health Outcomes Research, Jones & Bartlett Learning

Non-Textbook Required Readings
Will be posted on the course website throughout course.

Course Website
The course has a website which provides access to important class documents such as the syllabus, assignment guides, case studies, and links to resources. Grades will also be posted on the site. All students enrolled in the course should be listed on the site. Please check that you have access to the website within the first few days of class opening. If you are not able to log on, notify the instructor as soon as possible. The website will be updated regularly and, therefore, it is important to check on a regular basis.
Technical Support
DoIT's Help Desk is available via LiveChat, phone and email for 19 hours a day, seven days a week, for walk-in customers eight hours a day, five days a week, and via a Web knowledgebase at all hours. The Help Desk knowledgebase has more than 3,000 documents, which were accessed online more than three million times during the year. See https://kb.wisc.edu/helpdesk/
Phone: 608-264-4357
Email: help@doit.wisc.edu (Response may not be immediate)

To chat with the Help Desk staff, click the LiveChat icon to initiate a chat session. Then, simply fill out the short form to start chatting with a Help Desk technician.
LiveChat is available from 8am-10pm, 7 days a week (excluding holidays)
No account information may be given out via LiveChat
Users of LiveChat must be affiliated with the UW and have a valid NetID
If you have problems initiating a LiveChat session, or need assistance with your NetID, password, or other account information, please call the DoIT Help Desk at +1-608-264-4357 (264-HELP)

Course specific Technology questions may be directed to:

Dorothy Farrar Edwards
608-262-7421
dfrdwards@wisc.edu

Division of Continuing Studies
608-262-1156
info@dcs.wisc.edu

VII. Assignments

<table>
<thead>
<tr>
<th>Assignment</th>
<th>Due Date</th>
<th>Percentage of Grade</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personal Outcome Statement</td>
<td>At 1 week</td>
<td>5%</td>
</tr>
<tr>
<td>ICF Review and Diagram</td>
<td>At 3 weeks</td>
<td>5%</td>
</tr>
<tr>
<td>Discussions</td>
<td>Bi-weekly</td>
<td>20%</td>
</tr>
<tr>
<td>Project Bibliography</td>
<td>At 8 weeks</td>
<td>10%</td>
</tr>
<tr>
<td>Outcome Measurement Reviews</td>
<td></td>
<td>10%</td>
</tr>
<tr>
<td>Outcome data collection</td>
<td></td>
<td>10 %</td>
</tr>
<tr>
<td>Final Project</td>
<td></td>
<td>30 %</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td><strong>100%</strong></td>
</tr>
</tbody>
</table>

Assignments are organized within eight modules and each module lasts approximately 2 weeks.

- **Personal Outcome Statement** – the purpose of this assignment is to share with classmates and instructor information about yourself and your area of interest. Create a Movenote that contains the following information: your name, current area of practice,
current outcome issue of interest to you, fun fact about you, and goal for course.

Movenote allows you to send a video message accompanied with a Power Point slide show. For this assignment your Movenote presentation should be 5-minutes or less. Please create 5 slides for this presentation. You should use your 5-minute narration to describe your slides in detail.

When using Movenote it's best to complete your slides first in Power Point and then save the PP files as a pdf file before uploading to Movenote. For some reason pdf files work better in Movenote and the text & images don't move around when they're uploaded. You can sign up for Movenote at: http://www.movenote.com/. Movenote should take you less than a half hour to master.

I encourage everyone to listen to each other's Movenote messages. Be sure to introduce yourself at the beginning of your message since I have not met most of you.

- **ICF Review** - the purpose of this assignment is to familiarize students with the ICF framework. Students will identify outcome measures appropriate for their area of practice for each domain of the ICF framework.

- **Learn@UW & Group Discussion** - All modules will include on-line discussion questions. Each student is required to post at least one primary comment that represents his/her position and/or thoughts about the discussion question. This primary post is to be approximately 200 words in length. The deadlines for posting are in the course schedule section of the syllabus.

  As well, it is required that each student make 2 other comments/reactions/questions regarding the posts of colleagues (of approximately 50 words in length). These responses are expected to make a contribution to the discussion.

  You are encouraged to participate to a greater extent on the discussion board questions. The above represents the minimum amount of participation to earn the allotted points

- **Measurement Evaluations** - Each week the student will submit a measurement review using the form provided by the instructor. This form includes a brief description of the measure, source and reliability and validity data and a brief summary of how the measure has been used in the area of practice including strengths, weaknesses and potential limitations The deadline for posting your weekly review is Sundays at noon.

- **Outcome Study Review** - Each student will review outcome studies addressing their specific area of practice. Studies must be published in peer-reviewed scientific journals. The course instructor will provide the review format. The review should include a brief statement of the purpose of the study, description of the sample and intervention and the outcome (dependent) measures used to evaluate the effectiveness of the intervention. The summary will also include: appropriateness of the measures used, problems of measurement and study outcome. These bi-weekly reports will be due on Friday at midnite.
Annotated Bibliography – Each student will create an annotated bibliography about a topic of his/her choosing related to outcome measurements used to establish evidence for their chosen area of practice. The bibliography should include information about measures representing each of the domains of the ICF related to this area of practice. This is due at the midpoint of the course (check course calendar for the exact date), but you should start planning the topic you will research so that you have enough time to adequately complete the literature overview, analysis of research and literature, and to summarize your thinking about the research/current literature in a coherent, concise paper.

This learning activity has 3 parts:
- Identify your topic (e-mail your idea(s) to course faculty; topic identification should be completed at the beginning of the module)
- After "approval" from the course faculty, begin your literature overview activities (continues through the course)
- Write and submit your annotated bibliography (due at the mid-point of the course in Module 4, check syllabus/calendar for exact date)

Outcome Measurement Project – Each student will create a measurement plan designed to provide evidence of efficacy and effectiveness for the area of practice selected by the student at the beginning of the course. The plan should include a description of the intervention, population to be treated and objective and subjective measures. Use the ICF framework to identify the domains to be assessed. Each measure description should include detailed information about the reliability and validity of the measurement tool and its use with the population of interest. Data collected using two of the measures described in the plan will be analyzed and presented.

Assignment Submission
Unless otherwise stated, each assignment must be electronically submitted to the course website prior to class on the assigned due date. In order to ensure equitable grade assignment, all assignments must be turned in on the due date. **Assignments turned in late will not receive full credit.** For every day that an assignment is late, 10% of the student’s earned points for that assignment will be deducted. **Assignments will NOT be accepted more than one week late.**

Guidelines for Assignment Format
Unless otherwise stated on the assignment guidelines:

1. All assignments should be typed, double-spaced, and use a font size no smaller than 14 characters per inch (e.g. Verdana 10-point font or Times New Roman 12-point font).
2. Use a 1-inch margin on all sides.
3. Insert page number for all assignments that are longer than 1 page.
4. All assignments should be written professionally using full sentences and paragraphs as appropriate.
5. Except for assignments to be written as occupational therapy documentation or otherwise specified, following the guidelines in the APA manual for writing style, including, but not limited to, headings, number, table format, citations, and reference list.
6. Clear and concise communication is a critical skill for OTs. Adhere to all page and space limits on assignments. Portions of the assignments exceeding page/space limits will not be considered in grading.

VIII. Student Evaluation

Course grading is based on the successful completion of all assignments, and is broken down according to the following percentages and awarded points.

Final grade assignment will use the following scale:

<table>
<thead>
<tr>
<th>%</th>
<th>Grade</th>
</tr>
</thead>
<tbody>
<tr>
<td>94-100</td>
<td>A</td>
</tr>
<tr>
<td>90-93.99</td>
<td>AB</td>
</tr>
<tr>
<td>84-89.99</td>
<td>B</td>
</tr>
<tr>
<td>80-83.99</td>
<td>BC</td>
</tr>
<tr>
<td>70-79.99</td>
<td>C</td>
</tr>
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</table>

IX. Schedule

<table>
<thead>
<tr>
<th>Week</th>
<th>Readings</th>
<th>Activities/ Assignments</th>
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</thead>
<tbody>
<tr>
<td>-------------------------------------------</td>
<td>-----------------------------------------------------------------------------------------------</td>
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</tbody>
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<tr>
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<tbody>
<tr>
<td></td>
<td>Chapter 5: Reliability</td>
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</tbody>
</table>
| Utility | Chapter 6: Validity of Measurements  
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<tr>
<th></th>
<th></th>
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<tbody>
<tr>
<td></td>
<td>ICF Diagram and narrative for a condition in your area of practice. Must include the 5 domains/elements (Body function and Structure, Activities, Participation, Environmental Factors and Personal Factors). Narrative must include at least one reliable and valid measure for each domain</td>
</tr>
</tbody>
</table>
Chapter 5: Generic Health Outcome Measures  
Chapter 6: Health Related Quality of Life  
Arbesman, M, Lieberman, D, & Metzler, CA. (2014). Health Policy Perspectives—Using evidence to promote the distinct value of occupational therapy. AJOT, 68, 381–385. | Identify and critically review two generic measures of health and/or quality of life used in outcome studies in your area of practice. |
|---------------------|-------------------------------------------------|-------------------------------------------------|
Chapter 7: Condition Specific Measures  
Chapter 8: Satisfaction with Care  
http://www.pcori.org/research-position papers on PCORI and PCORI methodology | Use the PCORI methodology guide to develop an outcome question relevant for your area of practice. Then Identify and critically review two condition specific measures of health and quality of life/life satisfaction used in outcome studies in your area of practice. |
Chapter 3: Assessment Identification and Selection  
Chapter 8: Nonstandardized Assessments | Identify and critically review two papers evaluating treatment or intervention outcomes in your practice area. Pay particular attention to the measures used to assess the study participants and evaluate the outcomes. Your review should address the strengths and weaknesses of the measures used as well as determine whether the data |
Chapter 13: Accommodating Diversity Issues in Assessment and Evaluation  
Chapter 15: Occupational Therapy Evaluation and Evidence Based Practice | Using the outcome question developed in Week 6—select your measures. What measures are needed to assess the outcomes of interest? Using the ICF framework identify the measures to be used to assess these outcomes. Obtain copies of these measures and for each measure or scale describe the measurement properties, the type of measure (generic vs disease specific) reliability and validity. |
| --- | --- | --- |
Chapter 10: Scoring and | Select 2 measures based on your review completed for Week 8. Collect data from a sample of clients/patients in your practice area. Although sample sizes will vary, based on the nature of |
### Interpretation of Results

**Chapter 11: Interpretation and Documentation**

In your practice, you must collect enough data to be able to draw conclusions about the outcomes based on your data. You will also need to collect information about the demographic and clinical characteristics of the individuals being evaluated. Score the assessments and if needed follow the directions to create standard or normalized score. Use the assignment guide to help organize/enter and analyze your data.

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<tbody>
<tr>
<td></td>
<td>Chapter 10: Scoring and Interpretation of Results</td>
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<tr>
<td></td>
<td>Chapter 11: Interpretation and Documentation</td>
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</table>

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<tbody>
<tr>
<td></td>
<td>Chapter 30: Reporting the results of clinical research</td>
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<td></td>
<td>Chapter 30: Reporting the results of clinical research</td>
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<table>
<thead>
<tr>
<th>Week 13: Presentation of Outcome Proposals and Findings</th>
<th></th>
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</table>
Course Syllabus
Occupational Therapy 891: Capstone Project I-IV

Capstone Project I - Need Identification: Development of Problem Statement (Spring Semester Yr.1)
Capstone Project II - Gathering Evidence: Theoretical, Clinical & Empirical (Fall Semester Yr. 2)
Capstone Project III - Project Design & Proposal: Program Description, Evaluation, Funding & Dissemination Plan (Spring Semester Yr.2)
Capstone Project IV - Project Implementation (Fall Semester Yr.3)

Credits: I credit per semester – 4 total credits

Format: Online

Instructor:
Graduate Faculty Mentor
Dorothy Farrar Edwards PhD
608 262-7421
dfrdwards@wisc.edu
Office hours/Chat hours: By Appointment

COURSE DESCRIPTION, OBJECTIVES, & POLICIES

Course Description

This on-line graduate course is designed to support the development and completion of the Doctoral Capstone Project (Occupational Therapy 892). Starting with the Spring semester of the first year the OTD program students register for one credit of the Doctoral Project in each subsequent fall and spring semester through the fall semester of the 3rd year. In the final semester of the program, students will register for Occupational Therapy 892 the 3 credit Capstone Project V Course. The Capstone Project is organized around the student’s proposed evaluation or innovation of an area of practice. It is in the form of a series of qualifying tasks, each of which represents a critical phase of the proposal. Guidance in the development of the doctoral project will be achieved through a combination of faculty mentorship and advising, peer mentorship, and review and comments from the Capstone Mentoring Committee comprised of
graduate faculty and professionals with content expertise in the area addressed by the doctoral project. The criteria for evaluation and project outcomes include:

I. Description of a gap or specific need in the student’s area of practice,

II. A critical review of the theoretical, clinical and empirical literature in the area to be studied,

III. A description of an innovative program, intervention or approach to the identified problem and detailed evaluation, funding, and dissemination plans,

IV. Project implementation

V. A summary report of the findings, critique of the process and generation of ideas for alternative approaches. (See syllabus for OT 892 Capstone Project V: Project Completion, Presentation & Dissemination for details of the final capstone project requirements)

Course Format
This class will use individual interactive discussions, readings, and applied assignments to accomplish course objectives. Students will work collaboratively with the capstone mentoring committee and the course instructor to accomplish specified learning activities.

Prerequisite Knowledge for this Course
Academic Knowledge: Master’s Degree in Occupational Therapy

Minimum Technical Skills:
1. Using the learning management system
2. Using email with attachments
3. Creating and submitting files in commonly used word processing program formats
4. Copying and pasting
5. Downloading and installing software

Course Objectives*
Upon course completion, the student will be able to:

- Identify a relevant clinical problem, gap in practice or specific need in the student’s area of occupational therapy practice
- Develop a clear statement of the problem or specific need
- Identify and retrieve relevant theoretical, clinical and empirical peer reviewed literature
- Develop a critical review of the literature
- Develop a comprehensive research or program development proposal
- Obtain all necessary IRB and institutional reviews and approvals
- Implement the research or program described in the proposal
• Evaluate the outcome using appropriate analytic techniques
• Develop the results and discussion sections of the final report

The types of capstone projects that students might select include, but are not limited to:

• Meta-analysis of evidence for a particular clinical intervention
• Pilot study on the efficacy of a particular intervention technique
• Development of a comprehensive quality improvement or quality assurance plan in a defined practice setting
• Program development of a new academic, clinical or community-based program
• Continuing education course development
• Program evaluation or review
• Client education materials that are evidence based
• Innovation or evaluation of new teaching method
• Legislative policy analysis
• Product development and evaluation
• Development of an evidence-based best practices or standard of care document
• A scientific research project involving the use of secondary data, a substudy of faculty research, case study or
• Management systems project

Regardless of project, students will be required to meet criteria for successful completion of each step in the process.

Each project will consist of:

1) a literature review that supports and justifies the need for the project, identifying gaps in knowledge within the domain of study
2) a description of the method(s) that will be used to achieve the project
3) an evaluation plan
4) implementation of at least a portion of the project (to be determined by the Capstone Mentor Committee in collaboration with the student)
5) description of results from the implementation
6) a discussion of the results interpreted in light of already existing knowledge
7) preparation of a professional report or manuscript related to the project
8) presentation of the final project to the faculty and fellow students and dissemination to a peer-reviewed, inter-professional audience

The capstone project provides students with direct experience in an inter-professional collaborative activity under the guidance of a mentor committee. Students will design and develop this project in the capstone project courses (7 credits) with a faculty mentor's guidance.
Criteria for development of the capstone project will, at a minimum, require the project to:

a) include ideas, concepts, or techniques beyond those currently in practice;
b) make a substantive contribution to knowledge or practice in the field;
c) demonstrate breadth of learning; and
d) advance inter-professional practice for the benefit of society.

The course instructor and OTD Program Coordinator will work with each student in identifying a mentor committee tailored to the project’s focus that meets the minimum following requirements:

- One UW-Madison Graduate faculty mentor
- One additional UW-Madison Faculty or Academic Staff with a doctoral degree
- One practitioner with a masters or doctoral degree having demonstrated expertise in the area of project content
- One certified and licensed occupational therapist (who could also fill the roles as mentor or expert practitioner)
- One expert in content outside the field of OT. (This individual may also serve as the student mentor for the portfolio project noted above.)

One member of the student mentor committee will be identified as the primary mentor.

All final capstone projects will be approved by a review committee consisting of a minimum of five Graduate Faculty, four of whom will be from UW-Madison. At least one designated Graduate Faculty Mentor from a student’s capstone project committee will serve as a member of the review committee when that student’s work is being reviewed.

During each semester, the course instructor will hold 3-5 synchronous online workshops and discussions with enrolled students. Workshop content will be relevant to the particular content of the semester topic. For example, in Capstone Project II - Gathering Evidence: Theoretical, Clinical & Empirical, the instructor will arrange for students to participate in an online workshop or tutorial on effective literature review and scientific writing. In Capstone Project III - Project Design & Proposal: Program Description, Evaluation, Funding & Dissemination Plan, an expert in grant identification and proposal writing will provide a lecture or workshop.

At the end of Capstone Project III, the course instructor will coordinate scheduling of a proposal review with the student’s mentor committee to ensure that the proposed project is: 1) of sufficient academic rigor to meet Capstone Project requirements, 2) is reflective of a doctoral-level project, and 3) scientifically and clinically sound and likely to contribute to the knowledge base of Occupational Therapy. Approval of the proposal will serve as a contract between the student and the Committee regarding the work necessary to pass the final Capstone course. The student must obtain a grade of B or
better in each Capstone Project Course prior to enrolling in the subsequent semester of the series.
UNIVERSITY OF WISCONSIN  
Department of Kinesiology  
Occupational Therapy Doctorate Program  

Course Syllabus  
Occupational Therapy 892  
Capstone Project V: Project Completion, Presentation and Dissemination  
Spring Semester Year 3  
3 Credits  

Format: Online  

Instructor:  
Graduate Faculty Advisor  
Dorothy Farrar Edwards PhD  
608 262-7421  
dfrdwards@wisc.edu  
Office hours/Chat hours: By Appointment  

COURSE DESCRIPTION, OBJECTIVES, & POLICIES  

Course Description  
The final Capstone project is organized around the student's proposed evaluation or innovation of an area of practice. It is in the form of a series of qualifying tasks, each of which represents a critical phase of the proposal. Guidance in the development of the doctoral project will be achieved through a combination of faculty mentorship and advising, peer mentorship, and review and comments from a minimum of two graduate trained professionals with content expertise in the area addressed by the Capstone project. The project outcomes include: Description of a gap or specific need in the student's area of practice, a critical review of the theoretical, clinical and empirical literature in the area to be studied, description of the proposed program, detailed evaluation plan, funding plan, dissemination plan and executive summary. The student will present his/her project to the graduate faculty and will also submit an abstract for presentation of the project findings at an appropriate professional meeting.  

Course Format  
This class will use individual interactive discussions, readings, and applied assignments to accomplish course objectives.
Prerequisite Knowledge for this Course
Academic Knowledge: Master’s Degree in Occupational Therapy and completion of 4 credits of Occupational Therapy 891

Minimum Technical Skills:
1. Using the learning management system
2. Using email with attachments
3. Creating and submitting files in commonly used word processing program formats
4. Copying and pasting
5. Downloading and installing software

Course Objectives*
Upon course completion, the student will:

- Prepare a final report describing the findings of the Capstone project including:
  - a description of a gap or specific need in the student’s area of practice,
  - a critical review of the theoretical, clinical and empirical literature in the area to be studied,
  - description of the proposed program, detailed evaluation plan, funding plan, dissemination plan and
  - executive summary
- Solicit and respond to comments of two graduate trained professionals with content expertise in the area addressed by the Capstone project.
- Revise the manuscript based on comments of faculty and professional mentors
- Prepare and present the findings of the Capstone project to the UW Occupational Therapy graduate faculty review committee
- Submit an abstract for presentation of the Capstone project findings to an appropriate inter-professional, peer-reviewed venue (journal, meeting)

Through structured ongoing, asynchronous discussions in the online environment, students will have the opportunity to exchange ideas, experiences and their learning during implementation of the Capstone Project. The instructor will schedule 3-4 online synchronous meetings of enrolled students for discussion and peer feedback at specific stages in the process. Students will engage in peer review of their final reports. Students will also prepare a poster describing the background, design, methods and results of the project for presentation at the annual Occupational Therapy Program Graduate Poster Event which will be held during a second visit to campus at the end of the program. This event is open to the public and invitations are sent to the campus community and inter-professional colleagues in practice in the surrounding region.

All final capstone projects will be approved by a review committee consisting of a minimum of five Graduate Faculty, four of whom will be from UW-Madison. At least one
designated Graduate Faculty Mentor from a student’s capstone project committee will serve as a member of the review committee when that student’s work is being reviewed.
Courses in the Professional Literacy suite will be one-credit, eight-week, interdisciplinary, instructor-led offerings with a focus on the following topics:

- Quality – The student receives high quality content, instruction, and technical support
- Flexibility – The course content focuses on professional literacies that apply to any field of study
- Convenience – The student can access and participate in course activities, anytime and anywhere
- Clarity – The student can easily navigate the course; design is simple and consistent
- Interactive Engagement – The courses will utilize a combination of student-student, student-instructor, and student-content interaction in both synchronous and asynchronous learning formats.

<table>
<thead>
<tr>
<th>Proposed Course</th>
<th>Supporting Attributes/Learning Objectives</th>
</tr>
</thead>
</table>
| Digital Literacy for Connected Professionals | • Understands and manages supporting networks  
• Understands and manages learning and work activities in the DE  
• Manages personal information in the DE                                                                 |
| Effective Communication (Two courses: written/verbal) | • Employs verbal and written communication successfully to address complex technical and business issues  
• Evaluates and addresses the needs of a variety of audiences  
• Employs processes and tools to effectively manage meetings and presentations  
• Evaluates the quality and accuracy of others’ communication                                                                 |
| Financial and Business Acumen             | • Understands and differentiates sources of financial information  
• Employs financial information in the development of business strategies and decision making  
• Employs financial information in management business operations                                                                 |
| Creating Breakthrough Innovations         | • Creates an environment of intellectual and technical curiosity  
• Challenges established technologies and practices  
• Translates innovations into viable business opportunities, assuring reliable implementation |
| Leading Teams                            | • Engages methods to build trust, cooperation, and affiliation among team members  
• Engages methods to effectively work across organizational and cultural boundaries  
• Establishes systems to enhance the functionality of team activities                                                                 |
| Project Management                       | • Applies appropriate project management methods to project scale, complexity, and context  
• Manages critical elements of projects, including scope, deliverables, schedule, resources, communications, finance, and risk  
• Implements effective measurement and control systems within a project                                                                 |
<table>
<thead>
<tr>
<th>Course Suite</th>
<th>Objectives</th>
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</thead>
</table>
| Change Management                                | • Engages a systematic approach to change management  
• Applies effective, research-based methods and tools to change management  
• Implements strategies to assure institutionalization of change initiatives |
| Business Negotiation                             | • Employs objective criteria to evaluate the quality and desirability of negotiated agreements  
• Creates proposals that provide opportunity for mutual gain  
• Separates personal interests and positions from problem solutions  
• Develops business alternatives to negotiated agreements |
| Legal Concepts for Technical Professionals       | • Understands and applies basic legal rules and concepts regarding contracts  
• Understands and applies basic legal rules and concepts of intellectual property (including patents, copyrights, trademarks, trade secrets) to business methods  
• Understands and applies basic legal rules and concepts of product liability, safety, product labeling, and consumer protection regulations to business ventures |
| Managing Information                             | • Understands information-quality heuristics and organization  
• Understands issues of security and efficiency for distributed team information management  
• Understands and applies basic email and social media management strategies |
| Professional Ethics                              | • Applies appropriate professional ethics codes and policies to solve ethical dilemmas in the workplace and industry  
• Identifies areas of potential ethical conflict  
• Engages others in fostering a climate of ethical practice the workplace and industry |
Appendix D: State Authorizations for Online Programs
## Authorized States for Distance Programs at UW-Madison

<table>
<thead>
<tr>
<th>State</th>
<th>Status</th>
<th>NO internships or clinicals</th>
<th>NO recruiting or targeted advertising</th>
</tr>
</thead>
<tbody>
<tr>
<td>GREEN - Fully authorized for distance education programs.</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>YELLOW - Partially authorized; restrictions noted</td>
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<tr>
<td>RED - Not authorized (yet); do not enroll students who live in these states.</td>
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<tr>
<td>Alabama</td>
<td>Authorized for engineering programs only.</td>
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<tr>
<td>Alaska</td>
<td>Fully Authorized</td>
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<tr>
<td>Arizona</td>
<td>Fully Authorized</td>
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<tr>
<td>Arkansas</td>
<td>Not Authorized. The process is onerous and expensive.</td>
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<tr>
<td>California</td>
<td>Authorized. No internships or clinicals.</td>
<td>X</td>
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</tr>
<tr>
<td>Colorado</td>
<td>Fully Authorized</td>
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<tr>
<td>Connecticut</td>
<td>Fully Authorized</td>
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<tr>
<td>Delaware</td>
<td>Authorized. No internships or clinicals.</td>
<td>X</td>
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<tr>
<td>District of Columbia</td>
<td>Application pending.</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Florida</td>
<td>Authorized. No internships or clinicals. No recruiting or targeted advertising.</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Georgia</td>
<td>Application pending.</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Hawaii</td>
<td>Fully Authorized</td>
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<td>Idaho</td>
<td>Fully Authorized</td>
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<tr>
<td>Illinois</td>
<td>Fully Authorized</td>
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<tr>
<td>Indiana</td>
<td>Application pending.</td>
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<tr>
<td>Iowa</td>
<td>Authorized. No internships or clinicals. No recruiting or targeted advertising.</td>
<td>X</td>
<td>X</td>
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<tr>
<td>Kansas</td>
<td>Not Authorized. The process is onerous and expensive.</td>
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<td>Kentucky</td>
<td>Authorized. No internships or clinicals. No recruiting or targeted advertising.</td>
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<td>Louisiana</td>
<td>Authorized. No internships or clinicals.</td>
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<tr>
<td>Maine</td>
<td>Authorized. No recruiting or targeted advertising.</td>
<td>X</td>
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<tr>
<td>Maryland</td>
<td>Authorized for engineering programs only.</td>
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<tr>
<td>Massachusetts</td>
<td>Not Authorized. The process is onerous and expensive.</td>
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<td>Michigan</td>
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<td>New Hampshire</td>
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<td>New Jersey</td>
<td>Fully Authorized</td>
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<tr>
<td>New Mexico</td>
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<td>X</td>
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<tr>
<td>New York</td>
<td>Authorized. No internships or clinicals.</td>
<td>X</td>
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</tbody>
</table>

For more information about state authorization, contact Sarah Kuba (sarah.kuba@wisc.edu), Academic Planning and Institutional Research, March 24, 2015
<table>
<thead>
<tr>
<th>State</th>
<th>Status</th>
<th>NO internships or clinicals</th>
<th>NO recruiting or targeted advertising</th>
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<tr>
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<td>Application pending.</td>
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<tr>
<td>Ohio</td>
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<td>x</td>
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<tr>
<td>Oklahoma</td>
<td>Authorized. No internships or clinicals. No recruiting or targeted advertising.</td>
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<tr>
<td>Oregon</td>
<td>Authorized. No internships or clinicals. No recruiting or targeted advertising.</td>
<td>x</td>
<td>x</td>
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<tr>
<td>Pennsylvania</td>
<td>Fully Authorized</td>
<td></td>
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</tr>
<tr>
<td>Rhode Island</td>
<td>Authorized. No recruiting or targeted advertising.</td>
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<td>x</td>
<td>x</td>
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<tr>
<td>South Dakota</td>
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<td>Fully Authorized</td>
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<td>Wyoming</td>
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</table>
Appendix E: Satisfactory Progress Chart
OCCUPATIONAL THERAPY - Minimum Degree Requirements and Satisfactory Progress

To make progress toward a graduate degree, students must meet the Graduate School Minimum Degree Requirements and Satisfactory Progress in addition to the requirements of the program.

Doctoral Degree:

OTD

Minimum Graduate Degree Credit Requirement

64 credits (34 beyond the M.S.)

Minimum Graduate Residence Credit Requirement

32 credits

Minimum Graduate Coursework (50%) Requirement

50% of degree coursework (32 of 64 total credits for OTD) must be completed in courses numbered 700 or above OR in any courses identified by the courses’ subject-owner as designed specifically for students in a graduate program.

Prior Coursework Requirements: Graduate Work from Other Institutions

With program approval, students are allowed to count up to 30 credits of graduate coursework from other institutions. Graduate work should be less than five years old to be considered; additional justification and/or documentation are needed for work taken between five and ten years. Work more than ten years old will not be considered.

Prior Coursework Requirements: UW–Madison Undergraduate

No undergraduate coursework will be allowed to count toward OTD requirements.

Prior Coursework Requirements: UW–Madison University Special

With program approval and payment of the difference in tuition (between Special and graduate tuition), students are allowed to count no more than 9 credits of coursework numbered 300 or above taken as a UW–Madison University Special student. These
credits are considered part of the total allowable credits available for a student to transfer. Coursework should be less than five years old to be considered; additional justification and/or documentation is needed for work taken between five and ten years. Work more than ten years old will not be considered.

Credits per Term Allowed

15 credits

Program-Specific Courses Required

The OTD has a prescribed curriculum of 64 credits. See Doctor of Occupational Therapy Curriculum

Overall Graduate GPA Requirement

Minimum 3.00 GPA required.

Other Grade Requirements

Course numbered 300 or above with a grade of A, AB, B, or S count toward minimum credit requirement; grades of BC or C count only if equal credits of AB and A offset the lower grades to average B (3.00). (For more information, see the Graduate School's Academic Policies and Procedures. See also Grading System on the Graduate School website.)

Probation Policy

The Graduate School regularly reviews the record of any student who earned grades of BC, C, D, F, or Incomplete in a graduate course (300 or above), or grade of U in research credits. This review could result in academic probation with a hold on future enrollment or in being suspended from the Graduate School.

Advisor

Every graduate student is required to have an advisor to meet UW information management needs, and accordingly, and of its own volition, the department assigns an advisor to each student. The advisor is a faculty member, or sometimes a committee, from the OTD program responsible for providing advice regarding graduate studies. The advisor may also serve on the capstone project committee.

To ensure that students are making satisfactory progress toward a degree, the Graduate School expects them to meet with their advisor on a regular basis. The OTD Program Coordinator will advise students in the early stages of their studies.
Assessments and Examinations

Curricular requirements (all didactic courses) must be passed, in conformity with GPA and grad requirements, above. Students capstone project proposal and final product must be reviewed and approved by a committee of graduate faculty.

Time Constraints

OTD degree students who have been absent for five or more consecutive years lose all credits that they have earned before their absence. Individual programs may count the coursework students completed prior to their absence for meeting program requirements; that coursework may not count toward Graduate School credit requirements.

Language Requirements

No language requirements.
Appendix F: OTD Program Assessment Plan
Program Overview

The mission of the OTD Program will be to train occupational therapists to become visionary leaders, engage in inter-professional education and practice, and facilitate research translation. The program will cultivate and grow practitioner interest in pursuit of careers in health care management, education and public service. Students enrolled in the program will already have the professional clinical training necessary for certification and licensure as occupational therapists. The degree will prepare therapists in advanced skills to become health services managers, policy advocates, and ambassadors for the clinical translation of research. Through OTD training, occupational therapists will expand their knowledge of the health and education delivery systems, the policies influencing transformation of care in these environments and will gain the tools needed to be visionary leaders in inter-professional contexts. Further, the profession is in dire need of therapists trained at the advanced practice doctoral level to serve its teaching shortages at institutions across the spectrum of education. The OTD degree will prepare therapists for positions as clinical faculty in entry-level training programs.

The curriculum is intentionally designed to expand students’ knowledge and appreciation of the power of human occupation in promoting health and well-being, broaden exposure to diverse ideas, values and culture, build skills in the translation of knowledge to the practice environment, and enhance leadership, personal and social responsibility. Curricular elements are in keeping with the Wisconsin Experience including exposure to research, global and cultural competency, leadership and activism opportunities, and application of knowledge.

The OTD Program review plan was designed to be consistent with the UW-Madison and the Graduate Faculty Executive Committee expectations for program assessment. The following is an outline of the components of that plan including:

A. The **learning goals** specifying the knowledge and/or skills a student will learn by completion of the program.

B. A matrix linking the goals to the points in the OTD curriculum where the expected learning will occur.

C. The **assessment strategies, both direct and indirect**, that will be used to demonstrate that students are meeting the expectations for learning.

D. The **plans for review** of the assessment findings, specifically addressing both the application of evidence and annual reporting.

**A. Learning Goals**

Learning goals for advanced practice Occupational Therapy Doctoral (OTD) students are inclusive of the learning goals established for entry-level Masters of Science in Occupational Therapy (MS-OT) students. The learning goals were based on the Doctoral and Masters Learning Goals, respectively, as specified by the Graduate Faculty.
Executive Committee at UW-Madison. They are also informed by the missions of the University of Wisconsin-Madison, the Graduate School, the School of Education and the Department of Kinesiology. The accreditation standards as articulated by the Accreditation Council for Occupational Therapy Education (ACOTE) for entry-level practice inform the Master’s learning goals. A set of core competencies developed by the Interprofessional Education Collaborative also informed the development of the learning goals. Table D1 provides a list of the learning goals categorized by “knowledge and skills” and “professional conduct”. Masters or entry-level learning goals are italicized and advanced practice doctoral learning goals are in bold type.

B. Where learning will occur

The matrix in Table D2 shows where in the proposed curriculum, expected learning will occur.

C. Assessment plan, strategies and measures

The student learning assessment plan will occur as an integral part of the overall program evaluation activities of the OTD Program. It will focus on the specific learning goals of the program, methods used to evaluate the goals, the process used to monitor the program over time and the action plan to implement any changes necessary to meet the goals. The student learning assessment plan is flexible so that revisions are possible.

The assessment plan includes both direct and indirect measures of learning outcomes. It draws from the varied sources of information available for both qualitative and quantitative evaluation. The Occupational Therapy Program has conducted ongoing evaluation of the MS-OT program and curriculum for accreditation and review purposes since inception of the program in 2005. The MS-OT curriculum and the program evaluation plan are closely linked to the standards required by ACOTE. Although accreditation is not required for the advanced professional OTD degree, we plan to use comparable measures in evaluating the OTD program as well as adding new measures appropriate to the assessment of advanced skills and the online delivery of course content.

Table D3 provides an overview of the program evaluation plan including the direct and indirect assessment strategies and the timeline that will be used in reviewing learning outcomes and associated curricular and program elements. The Graduate Student Learning Outcomes will primarily be assessed through the methods listed in Program Goals 1, 2 and 3. Narrative description of the assessment strategies follows the table.
D. Program review process

The OTD Program coordinator and support staff will compile the information from program evaluation activities for presentation to faculty and staff. The faculty and staff will meet once annually, at a minimum, to review and evaluative evidence, determine whether students are meeting learning goals and the program is achieving its objectives. Analysis of the findings and recommendations for program improvement will be documented and become the basis for an annual report to be submitted to the Department Executive Committee and the Office of the Provost.
Table D1: Graduate Learning Goals

<table>
<thead>
<tr>
<th>Knowledge and Skills</th>
<th>Doctoral Level</th>
<th>Occupational Therapy Doctoral Program Learning Goals (July 2015)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Articulates research problems, potentials, and limits with respect to theory, knowledge, or practice within the field of study.</td>
<td><strong>Foundational knowledge</strong></td>
</tr>
<tr>
<td></td>
<td>Formulates ideas, concepts, designs, and/or techniques beyond the current boundaries of knowledge within the field of study.</td>
<td>- Demonstrate an understanding of the physical, psychological and contextual substrates of human occupation in typical and non-typical development.</td>
</tr>
<tr>
<td></td>
<td>Creates research, scholarship, or performance that makes a substantive contribution.</td>
<td>- Discuss the role of personal and environmental factors on involvement in daily activities and community participation.</td>
</tr>
<tr>
<td></td>
<td>Demonstrates breadth within their learning experiences.</td>
<td>- Critically examine and apply theories associated with the science of human occupation and models of inter-professional practice to service delivery.</td>
</tr>
<tr>
<td></td>
<td>Advances contributions of the field of study to society.</td>
<td>- Demonstrate knowledge of one’s own role and those of other professions to appropriately assess and address the needs of clients and populations served.</td>
</tr>
<tr>
<td></td>
<td>Communicates complex ideas in a clear and understandable manner.</td>
<td>- Demonstrate in-depth knowledge of the evolution of the profession, the social and global forces influencing practice, delivery models, policies, and systems, including inter-professional and emerging areas of practice.</td>
</tr>
</tbody>
</table>

**Scientific inquiry and theory development:**
- Articulate current problems facing the profession of occupational therapy in an inter-professional context with respect to theory, knowledge and practice.
- Identify and critique current knowledge, theories and evidence to inform practice.
- Demonstrate necessary skills for designing a scholarly proposal that includes a research question, relevant literature, sample, design, measurement, and data analysis.
- Participate in scholarly activities that evaluate professional practice, service delivery, and/or professional issues.
- Articulate the knowledge, roles and practices of other professions with whom occupational therapists typically engage in practice.
- Formulate systems to gather, analyze and interpret data from a practice setting.
- Translate evidence into best practice for the continued development of the profession.
- Develop and implement an inter-professional, scholarly capstone project that addresses an identified service system, intervention or programmatic problem, relates theory to practice and demonstrates synthesis of advanced knowledge in a practice area.
- Demonstrate an understanding of the process for locating and securing grants and how grants can serve as a fiscal resource for scholarly and programmatic activities.
- Evaluate the outcomes of the capstone project and communicate findings to an inter-professional audience in a clear, understandable manner through a peer-reviewed report or presentation.

**Practice reasoning, decision making and application:**
- Appropriately assess clients’ participation in daily life activities and employ an inter-professional approach to determining the clients’ needs within the context of family and society.
- Identify factors within the environment that influence participation in home and community life.
<table>
<thead>
<tr>
<th>Doctoral Level</th>
<th>Occupational Therapy Doctoral Program Learning Goals (July 2015)</th>
</tr>
</thead>
</table>
| Knowledge and Skills (cont.) | • Plan for discharge in collaboration with the client and family and terminate occupational therapy when appropriate.  
• Empirically monitor client progress and treatment efficacy in practice.  
• Identify and apply appropriate tools for measuring practice outcomes at the individual and systems level.  
• Synthesize current knowledge, available evidence and responses to interventions to inform new approaches to practice problems.  
• Demonstrate the skills necessary to lead and manage an inter-professional team. |
| Professional Conduct | • Fosters ethical and professional conduct.  
Professional values and behaviors:  
• Articulate the values of the occupational therapy profession.  
• Work with individuals of other professions to maintain a climate of mutual respect and shared values.  
• Describe the varied roles of the occupational therapist as practitioner, educator, researcher, and entrepreneur,  
• Establish appropriate therapeutic relationships with individuals, groups, organizations and systems,  
• Use effective interpersonal communication and demonstrate effective and culturally sensitive group communication.  
• Demonstrate use of safety precautions with the client during the process of practice.  
• Demonstrate knowledge of legal and ethical issues related to care in health, education, and community settings.  
• Demonstrate commitment to professional growth through the creation, implementation and monitoring of a career development plan.  
• Demonstrate active involvement in professional development, leadership, and advocacy for the benefit of constituents and the profession. |

*Masters or entry-level (MS-OT) learning goals are italicized  
Advanced practice doctoral (OTD) learning goals are in bold type*
### Table D2: Intersection of OTD Course Content and Learning Goals

<table>
<thead>
<tr>
<th>Courses</th>
<th>OTD Learning Goals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Professional Literacy Courses</td>
<td>X</td>
</tr>
<tr>
<td>Applied Inter-professional Leadership and Management</td>
<td>X</td>
</tr>
<tr>
<td>Human Occupation and Health</td>
<td>X</td>
</tr>
<tr>
<td>Current Trends Shaping OT Practice</td>
<td>X</td>
</tr>
<tr>
<td>Advanced Practice in Inter-professional Contexts</td>
<td>X</td>
</tr>
<tr>
<td>Application of OT Evidence in the Practice Environment</td>
<td>X</td>
</tr>
<tr>
<td>Using Information to Optimize Practice</td>
<td>X</td>
</tr>
<tr>
<td>Communicating OT to Inter-professional audiences</td>
<td>X</td>
</tr>
<tr>
<td>Advanced Outcome Measurement: Theory &amp; Practice</td>
<td>X</td>
</tr>
<tr>
<td>Breadth Requirements</td>
<td>X</td>
</tr>
<tr>
<td>Capstone Project I-V</td>
<td>X X X X X</td>
</tr>
<tr>
<td>Courses</td>
<td>OTD Learning Goals (cont.)</td>
</tr>
<tr>
<td>------------------------------------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Evaluate the outcomes of the capstone project and communicate findings to an inter-professional audience in a clear, understandable manner through a peer-reviewed report or presentation.</td>
<td></td>
</tr>
<tr>
<td>Empirically monitor client progress and treatment efficacy in practice.</td>
<td></td>
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<tr>
<td>Identify and apply appropriate tools for measuring practice outcomes at the individual and systems level.</td>
<td></td>
</tr>
<tr>
<td>Synthesize current knowledge, available evidence and responses to interventions to inform new approaches to practice problems.</td>
<td></td>
</tr>
<tr>
<td>Demonstrate the skills necessary to lead and manage an inter-professional team.</td>
<td></td>
</tr>
<tr>
<td>Demonstrate commitment to professional growth through the creation, implementation, and monitoring of a career development plan.</td>
<td></td>
</tr>
<tr>
<td>Demonstrate active involvement in professional development, leadership, and advocacy for the benefit of constituents and the profession.</td>
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</tr>
<tr>
<td>Professional Literacy Courses</td>
<td>X</td>
</tr>
<tr>
<td>Applied Inter-professional Leadership and Management</td>
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<tr>
<td>Current Trends Shaping OT Practice</td>
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<tr>
<td>Advanced Practice in Inter-professional Contexts</td>
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<tr>
<td>Application of OT Evidence in the Practice Environment</td>
<td>X</td>
</tr>
<tr>
<td>Using Information to Optimize Practice</td>
<td>X</td>
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<tr>
<td>Communicating OT to Inter-professional audiences</td>
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</tr>
<tr>
<td>Advanced Outcome Measurement: Theory &amp; Practice</td>
<td>X</td>
</tr>
<tr>
<td>Breadth Requirements</td>
<td>X</td>
</tr>
<tr>
<td>Capstone Project I-V</td>
<td>X</td>
</tr>
<tr>
<td>Program Goal</td>
<td>Direct</td>
</tr>
<tr>
<td>----------------------------------------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| 1. Recruit, admit, retain and graduate highly qualified students with occupational therapy practice experience and a masters’ degree or equivalent. | - OT Licensure  
- Transcripts  
- Pre-assessment of core professional competencies | - Annually, at time of application | - Admissions and matriculation metrics including number, demographic characteristics and qualifications of prospective and entering students | - Tracked annually             |
| 2. Prepare experienced practitioners for new roles as team leaders, project managers, administrators, advocates, teachers, or entrepreneurs through didactic and interprofessional practice experiences. | - Embedded exams  
- Peer and mentor feedback on professional development plan and portfolio  
- Capstone project report and presentation | - Annually  
- Upon completion of didactic content  
- Upon completion of project | - Student course evaluations  
- OTD Program satisfaction questionnaire  
- Exit Interview  
- Alumni Survey  
- Employer Survey | - Annually  
- Annually  
- At end of program  
- 1-, 5-, 10-years post-grad  
- 2-years |
| 3. Graduate scholarly practitioners who promote and apply evidence to the development of best practices. | - Post-assessment of core professional competencies | - At end of program | - Alumni Survey  
- Employer Survey  
- External Reviews | - 1-, 5-, 10-years post-grad  
- 2-years  
- 3-year progress report to GFEC; 5-year initial review; 10-year ongoing review |
| 4. Recruit and retain faculty, academic staff, and interprofessional practice mentors who exemplify excellence in teaching and scholarship and serve as role models for the occupational therapy profession. | - Faculty Merit Review  
- Academic Staff Merit Review  
- Maintain database of qualifications of interprofessional practice mentors | - Annually  
- Annually  
- Ongoing | - Mentor survey  
- Program enrollment and fiscal status | - Annually  
- Annually with report to Department, School of Education and other appropriate bodies at 3-years |
Narrative Description of Assessment methods:

**Admissions, matriculation, and graduation metrics:** We will monitor application and enrollment characteristics including previous degrees, years of OT practice, advanced certifications and other significant professional training or achievements, mean GPA in graduate coursework, years to degree completion, and graduation rate. We will also survey non-matriculating applicants to gather information on barriers encountered in the application or admissions process.

**Assessment of core professional competencies:** A pre- and post-questionnaire will be completed by each enrolled student which will address Core Competencies for Inter-professional Collaborative Practice as defined by the Department of Engineering Professional Development (http://epdweb.engr.wisc.edu/) and the Interprofessional Education Collaborative (https://ipecollaborative.org/). Key domains include:

- **Values/Ethics for Interprofessional Practice**
  - Ethical principles
  - Legislation and legal concepts in health, education and community environments
- **Roles/Responsibilities**
  - Leading & managing
  - Project management
  - Financial and accounting principles
- **Interprofessional Communication**
  - Effective professional communication
  - Managing information
- **Teams and Teamwork**
  - Effective negotiation
  - Leading teams
  - Leveraging and use of collaboration tools including digital technology

**Embedded Exams:** Assessment will be embedded within course exams or assignments. Individual and collective performance using specified grading criteria or rubrics will be reviewed annually without instructor or student identifiers.

**Capstone Project Report and Presentation:** Faculty will create a rubric for evaluating performance on the capstone project. The rubrics will have identifiers removed prior to review at the annual program evaluation meeting at which time faculty and staff will identify areas of program strength or areas for improvement.

**Course Evaluations:** Review process will reflect current best practices in online learning and will be based on national standards and research findings. The design will include using the OTD student learning goals as outlined above. We will also include items relevant to the Quality Matters Rubric: A National Benchmark for Online Course Design (https://www.qualitymatters.org/) such as the following:

- Course Overview and Introduction
- Learning Objectives (Competencies)
- Assessment and Measurement
- Instructional Materials
- Learner Interaction and Engagement
- Course Technology
- Learner Support
- Accessibility

**Annual Satisfaction Questionnaire:** A questionnaire distributed upon completion of the first and second years of the curriculum and linked to achievement of learning outcomes described in curriculum, online delivery experience, mentoring and advising, technology support, availability of campus resources and other general characteristics of the program.

**Peer and mentor feedback on professional development plan and portfolio:** Opportunities for providing and gathering this feedback will be built into the curriculum as described above and in the course syllabi.

**Exit Interview:** At the end of the program when students make the final visit to campus, the OTD Program Director will schedule an Exit Interview with each graduating student. The interview may include other faculty or staff as deemed appropriate.

**Alumni Survey:** The survey will be tied to the professional development plan of each OTD student and fielded at one-, five- and ten-year increments post-graduation to measure professional outcomes of the program. Specifically, we will include questions such as:
- Are graduates in jobs with formal leadership responsibilities? Have they taken on new leadership roles or activities after graduation? Do any new responsibilities align with their goals for obtaining the OTD?
- Are graduates working within and benefitting the state of WI?
- In what ways are graduates actively partnering across disciplines and/or professions?
- To which audiences was the Capstone project disseminated?
- In what ways are graduates applying current evidence to achieve best practice?
- What innovative programs have graduates designed, implemented or evaluated in their work setting?

**Employer Survey:** At two-years post-graduation, we will contact employers of our graduates to seek feedback on observed changes in therapist skills, job responsibilities and professional interactions.

**Other:** Assessment related to faculty and staff recruitment and retention, mentors and fiscal status are the responsibility of the OTD Program Coordinator in collaboration with the overall OT Program Director and the Department Executive Committee. The OT Program Director is responsible for coordinating external reviews, preparing fiscal reports, and other supervision and administrative activities for OT programs.
Appendix G: Faculty Profiles
Assistant Professor Karla Ausderau, earned her doctoral degree in Occupational Science from the University of Southern California and completed an NIH funded post doctorate at the University of North Carolina-Chapel Hill. She joined the faculty of the Department of Kinesiology, Occupational Therapy Program at UW-Madison in 2012. Professor Ausderau’s research focuses on studying daily occupations, specifically eating and mealtimes, among families and children with autism spectrum disorders to elucidate the impact on the child’s health, family wellness, and overall daily participation. She also is engaged in research on the sensory features of children with autism spectrum disorder, including their development and the impact on daily participation. Professor Ausderau incorporates both graduate and undergraduate students into her research program and publications. Her teaching responsibilities have been in the areas of evidence-based research, professional writing, and pediatric occupational therapy practice. Prior to completion of her doctoral work, Professor Ausderau worked for over ten years as a clinician focusing her practice on families and children with special needs, including directing an interdisciplinary feeding clinic.

Associate Professor Ruth E. Benedict is Coordinator/Director of the Occupational Therapy (OT) Program. She joined the UW-Madison faculty in 2001 and was promoted with tenure in the Department of Kinesiology in 2008. Her graduate training in Occupational Therapy and in Public Health specializing in Maternal and Child Health were completed at the University of North Carolina, Chapel Hill. Her research expertise includes epidemiological, health services and outcomes research methodologies to enhance our understanding of the special health care needs of children. Specifically, she studies the effectiveness of the delivery system and targeted interventions in serving those needs. Professor Benedict holds an affiliate appointment and collaborates with faculty in the Department of Population Health Sciences, as well as UW-Health clinicians, the Waisman Center, and the Centers for Disease Control and Prevention (CDC). Professor Benedict’s work on the reliability and validity of conducting surveillance of functional status among children with cerebral palsy was instrumental in the implementation and ongoing monitoring of functional gross motor skills the U.S. population of children with cerebral palsy. Professor Benedict’s work in health services research examines the determinants and patterns of therapy and support services among children having functional limitations and the role of the service delivery system in meeting their needs. Her areas of teaching expertise include health care organization and management, policy and advocacy, and evidence-based practice. Professor Benedict developed and has been teaching an online course, Assistive Technology in Practice, since 2006. As Director of the OT Program, Professor Benedict will oversee the OTD program and support the coordinator in the hiring and management of personnel, implementation of the curriculum, and conducting ongoing program evaluation.

Professor Dorothy Farrar-Edwards is Chair of the Department of Kinesiology and a member of the faculty of the Occupational Therapy Program. Professor Farrar-Edwards received her PhD in Psychology from Washington University in St. Louis with an emphasis in Aging and Development. She joined the faculty of the University of Wisconsin-Madison in 2006 and was
promoted to Full Professor in 200. Professor Farrar-Edwards holds joint appointments in the Departments of Medicine and Neurology at the School of Medicine and Public Health. She formerly served as an Associate Professor of Occupational Therapy and Neurology at Washington University School of Medicine. Her research is focused on the impact of cognitive loss or change on complex activities of daily living and community participation in persons with stroke and Alzheimer’s disease. She has over 80 peer reviewed publications - the majority addressing cognition and function in persons with Alzheimer's disease (AD) and stroke, particularly among persons of color. She has a record of independent NIH funding. She is a member of the American Occupational Therapy Foundation’s Academy of Research. Professor Farrar-Edwards is currently funded by the National Institute on Aging, the National Institute of Neurological Disease and Stroke and the National Institute of Minority Health and Health Disparities. Professor Farrar-Edwards is past Chair of the Social Studies Divisional Committee and currently serves on the University Committee. Her areas of teaching expertise in the OT Program include evidence-based practice, research design and methodology, and cognitive function in persons with Alzheimer’s disease and stroke.

Associate Professor Elizabeth Larson holds an appointment in the Department of Kinesiology, Occupational Therapy Program. Dr. Larson is an occupational therapist and occupational scientist with over thirty years of clinical and research experience working with children with disabilities and their families. In her research, she uses mixed methods approaches to examine the impact of managing a child’s disability on the family and especially the caregiver. She employs multi-faceted approaches to gain a deeper understanding of the caregiver’s perspectives and daily lived experience of caregiving, including the use of participant-grounded methods such as interviews, focus groups, and participant observation within the family homes. She has employed qualitative methods in concert with well-being and physiologic measures. The overarching goal of her work is to investigate how caregiver’s organization and orchestration of daily activities, tailored to the child’s developmental needs, promotes or impedes family functioning, and in turn influences the caregiver’s health and well-being. In teaching, Dr. Larson was recently awarded a School of Education Virginia Horne Henry Grant to expand the offering of an innovative wellness course entitled Living well: Life balance and health promotion for college students. She is currently enrolled in DoIT’s Blended Learning course which will assist her in learning and using backward course design to facilitate thoughtful implementation of blended on-line and face to face learning formats. Dr. Larson’s teaching expertise is in occupational science and theory, treatment and professional practice content.

Assistant Professor Kristin Pickett is a new hire to the Department of Kinesiology, Occupational Therapy Program. She officially began her appointment in Fall 2014. Professor Pickett was a postdoctoral fellow at Washington University in St. Louis, with a joint position in the Program in Physical Therapy and the Department of Neurology’s Movement Disorders Division. Her doctoral work was completed at the University of Minnesota. Her research interests focus on individuals with neurologically based movement disorders and understanding the
neuropathophysiology underlying observed motor manifestations. She uses resting state functional MRI as well as a task-based fMRI paradigm, in concert with spatiotemporal gait analysis and clinical measures, to study individuals with Parkinson’s disease. She has held an adjunct teaching faculty position at the University of Wisconsin – River Falls and served as the primary instructor for the Biomechanics course at the University of Minnesota.

Assistant Professor Brittany Travers is another new hire to the Occupational Therapy Program who joined the faculty in August 2014. Professor Travers is not new to UW-Madison having completed three years of Post-doctoral training at the Waisman Center under the mentorship of Andrew Alexander, Richard Davidson, and Janet Lainhart. She completed her doctoral work at the University of Alabama in Cognitive Psychology under the mentorship of Drs. Mark and Laura Klinger. Professor Travers studies motor behavior among children with autism spectrum disorders (ASD). Although motor impairments are not a core diagnostic feature of ASD, her research in conjunction with the broader literature demonstrates that individuals with ASD struggle with motor difficulties and that these motor difficulties predict impairments in other core domains associated with ASD. In her work she has used methodologies as diverse as neuroimaging and video games to illuminate the underlying mechanisms of motor impairments and to test interventions for promoting motor ability and daily living skills among affected individuals. Professor Travers is contributing her expertise in research design and methodology to the training of our MS-OT students and is rapidly immersing herself in occupational therapy culture and practice.
Appendix H: Proposed Budget
### PROPOSED BUDGET - NON-POOL (Fund 131)

#### 10% Campus Assessment Year 1; 20% Beginning Year 2

<table>
<thead>
<tr>
<th>%</th>
<th>SoE Contribution to Development</th>
<th>DCS support request for Development</th>
<th>Year 1</th>
<th>Year 2</th>
<th>Year 3</th>
<th>Year 4</th>
<th>Year 5</th>
<th>Cumulative Total</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>A. Instructional Personnel - Faculty, Instructors</strong></td>
<td></td>
<td></td>
<td></td>
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<td>1. Ausderau 1.00%</td>
<td>$670</td>
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<td>$5,686</td>
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<td>4. Larson 1.00%</td>
<td>$765</td>
<td>$8,500</td>
<td>$6,600</td>
<td>$8,443</td>
<td>$8,780</td>
<td>$9,130</td>
<td>$47,803</td>
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</tr>
<tr>
<td>5. Pickett 2.00%</td>
<td>$7,707</td>
<td>$7,394</td>
<td>$7,690</td>
<td>$8,000</td>
<td>$36,214</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>6. Travers</td>
<td>$7,933</td>
<td>$7,394</td>
<td>$9,104</td>
<td>$10,846</td>
<td>$11,280</td>
<td>$11,730</td>
<td>$50,893</td>
<td></td>
</tr>
<tr>
<td>7. Bebeau 1.00%</td>
<td>$758</td>
<td>$6,317</td>
<td>$9,664</td>
<td>$10,050</td>
<td>$10,450</td>
<td>$10,870</td>
<td>$47,351</td>
<td></td>
</tr>
<tr>
<td>8. Gartland 2.00%</td>
<td>$1,010</td>
<td>$5,610</td>
<td>$6,437</td>
<td>$6,690</td>
<td>$7,240</td>
<td>$7,530</td>
<td>$40,467</td>
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</tr>
<tr>
<td>9. Affiliate 5.00%</td>
<td>$3,250</td>
<td>$7,222</td>
<td>$8,288</td>
<td>$10,050</td>
<td>$10,450</td>
<td>$10,870</td>
<td>$47,351</td>
<td></td>
</tr>
<tr>
<td><strong>Total Instructional Personnel</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>$12,581</td>
</tr>
<tr>
<td>1. Post Doctoral Associates</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>$670</td>
<td>$7,444</td>
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<tr>
<td>2. Graduate Student (PA) 33.30%</td>
<td>$11,576</td>
<td>$36,856</td>
<td>$38,330</td>
<td>$39,860</td>
<td>$149,752</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>3. Graduate Student (TA)</td>
<td>$11,576</td>
<td>$23,130</td>
<td>$36,856</td>
<td>$38,330</td>
<td>$149,752</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>4. Research Assoc/Grad Intern</td>
<td></td>
<td></td>
<td>$1,000</td>
<td>$1,040</td>
<td>$1,080</td>
<td>$1,120</td>
<td>$4,240</td>
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<tr>
<td>5. Undergraduate Students - Student Hourly</td>
<td></td>
<td></td>
<td>$2,000</td>
<td>$2,080</td>
<td>$2,160</td>
<td>$2,250</td>
<td>$8,490</td>
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<tr>
<td>7. Classified - LTE</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>$7,707</td>
<td></td>
</tr>
<tr>
<td>8. Student Services Coordinator (12 M) 25%</td>
<td>$10,974</td>
<td>$16,834</td>
<td>$17,510</td>
<td>$18,943</td>
<td>$19,700</td>
<td>$102,168</td>
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<tr>
<td>9. OTD Program Coordinator (12 M) 25%</td>
<td>$19,125</td>
<td>$19,890</td>
<td>$20,690</td>
<td>$21,520</td>
<td>$22,380</td>
<td>$103,605</td>
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<td></td>
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<tr>
<td>10. OT Program Faculty Director (9M) 5%</td>
<td>$7,650</td>
<td>$8,500</td>
<td>$3,825</td>
<td>$3,980</td>
<td>$4,140</td>
<td>$4,480</td>
<td>$29,235</td>
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<tr>
<td><strong>Total Salaries</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>$31,807</td>
<td>$96,790</td>
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<tr>
<td><strong>C. Fringe Benefits</strong></td>
<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td>$9650</td>
<td>$13,750</td>
</tr>
<tr>
<td>Development (DCS)</td>
<td>$24,400</td>
<td>$13,750</td>
<td>$8,050</td>
<td>$2,600</td>
<td>$2,600</td>
<td></td>
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<td></td>
</tr>
<tr>
<td><strong>Total S&amp;W + FB</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>$41,457</td>
<td>$96,790</td>
</tr>
</tbody>
</table>

### PROJECTED EXPENSES

10% SoE Contribution to Development

1. Post Doctoral Associates 33.30% $11,576

**SoE Support Request for Development** for Development

*A 33.7% 4.0%

*B1&B4 23.3% 46.5%

*B3 24.5% 15.9%

**Total S&W + FB**

$41,457 $96,790 $54,556 $136,149 $181,398 $234,790 $244,200 $253,970 $1,105,062
### D. Supplies and Expenses

<table>
<thead>
<tr>
<th>Item</th>
<th>%</th>
<th>Year 1</th>
<th>Year 2</th>
<th>Year 3</th>
<th>Year 4</th>
<th>Year 5</th>
<th>Cumulative Total</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total Supplies and Expenses</strong></td>
<td></td>
<td>12,400</td>
<td>-</td>
<td>23,500</td>
<td>34,250</td>
<td>27,750</td>
<td>32,850</td>
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<tr>
<td>Debt</td>
<td></td>
<td>23,500</td>
<td>22,756</td>
<td>46,256</td>
<td>18,975</td>
<td>72,105</td>
<td>113,850</td>
</tr>
<tr>
<td><strong>Total Costs</strong></td>
<td></td>
<td>53,857</td>
<td>78,056</td>
<td>212,874</td>
<td>381,009</td>
<td>456,796</td>
<td>467,797</td>
</tr>
</tbody>
</table>

### PROJECTED REVENUE

| Number of New Students                          | 15 | 15 | 18 | 20 | 20 | 20 |
| Total Number of Students                        | 15 | 29 | 45 | 50 | 54 | 54 |
| Number of Credit Hours per Student              | 11 | 11 | 11 | 11 | 11 | 11 |
| Tuition Rate/Program Fee per credit             | $1,150 | $1,150 | $1,150 | $1,150 | $1,150 | $1,150 |
| Division of Continuing Studies                  | $96,790  | $54,556  | $31,927  | $10,307  | $96,790  | $96,790  |
| **Total Revenue**                               | $96,790  | $54,556  | $31,927  | $10,307  | $628,705 | $2,530,650 |

| DCS Balance carried forward                     |   |   |   |    | $96,790 | $96,790 |
| **NET INCOME FOR YEAR**                         |   |   | $ (23,500) | $ (23,124) | $ 56,516 | $422,347 |
| **NET INCOME retained by unit (67%)**           |   | $ (23,500) | $ (23,124) | $ 56,516 | $187,760 | $203,864 |
| **NET INCOME returned to SoE (33%)**            |   | $ (23,500) | $ (23,124) | $ 56,516 | $187,760 | $203,864 |

- Specific Instructional Personnel as yet to be determined; Names reflect current staffing as placeholders for budgeting purposes
- 2% salary increases each year built into budget
- Program development expenses 2013-2015
- One-month of summer salary per course for faculty for development of online content; Dark shaded cells designate when expense will be incurred
- Attrition of 10% of students lost in first year of enrollment is included
Appendix I: Letters of Support
October 22, 2013

Dorothy Farrar-Edwards, PhD
Professor and Chair
Dept. of Kinesiology
University of Wisconsin-Madison
2000 Observatory Drive
Madison, WI 53706

Dear Dr. Edwards:

I am pleased to offer this letter in support of the Department of Kinesiology Occupational Therapy Program’s Notice of Intent to plan a post-professional Occupational Therapy Doctorate (OTD) degree. The proposed distance learning program will serve the educational needs of mid-career therapists eager to learn the skills necessary for responding to the ever-changing health and education landscape. The UW-Madison campus has a strong history of providing students with a broad range of health science training at the professional and post-professional levels. The OT Program’s 70 year history of training students to enter the occupational therapy profession will serve it well in this new venture to extend the Wisconsin Idea through the training of post-professional students. The current emphasis on Interprofessional Education in the health sciences is consistent with innovative approaches to retooling therapists for new models of practice and collaboration. The program’s goals of training students to apply research to practice, to engage in advocacy, program development, management and education are consistent with the demands of the contexts within which occupational therapists work. The proposed program will open opportunities for collaboration in inter-professional education.

Our Department is extremely sympathetic to this initiative, having had great success in hiring Clinical Faculty members who have earned their Clinical Doctorate in Audiology (the Au.D. degree) by precisely the same mechanisms and procedures described in the Department of Kinesiology Occupational Therapy’s Notice of Intent. These valued members of our Clinical Faculty have brought the outstanding leadership and instructional skills to our students, and the to the field of Audiology in general, that are projected to be the “product” of the proposed degree program.

As the Chair of Communication Sciences and Disorders, I extend my support for this Educational Innovations proposal in the spirit of interdisciplinary cooperation.

Sincerely,

Gary Weismer, Ph.D.
Oros Bascom Professor and Chair
September 16, 2013

Dorothy Farrar-Edwards, PhD
Professor and Chair
Dept. of Kinesiology
University of Wisconsin-Madison
2000 Observatory Drive
Madison, WI 53706

Dear Dr. Edwards:

I am pleased to offer this letter in support of the Department of Kinesiology Occupational Therapy Program’s Notice of Intent to plan a post-professional Occupational Therapy Doctorate (OTD) degree. The proposed distance learning program will serve the educational needs of mid-career therapists eager to learn the skills necessary for responding to the ever-changing health and education landscape. The UW-Madison campus has a strong history of providing students with a broad range of health science training at the professional and post-professional levels. The OT Program’s 70 year history of training students to enter the occupational therapy profession will serve it well in this new venture to extend the Wisconsin Idea through the training of post-professional students. The current emphasis on Interprofessional Education in the health sciences is consistent with innovative approaches to retooling therapists for new models of practice and collaboration. The program’s goals of training students to apply research to practice, to engage in advocacy, program development, management and education are consistent with the demands of the contexts within which occupational therapists work. The proposed program will open opportunities for collaboration in inter-professional education.

As the director of the Doctor of Physical Therapy Program, I extend my support for this Educational Innovations proposal in the spirit of interdisciplinary cooperation.

Sincerely,

Lisa Steinkamp, PT, MS, MBA
September 16, 2013

Dorothy Farrar-Edwards, PhD
Professor and Chair
Dept. of Kinesiology
University of Wisconsin-Madison
2000 Observatory Drive
Madison, WI 53706

Dear Dr. Edwards:

I am pleased to enthusiastically offer this letter in support of the Department of Kinesiology Occupational Therapy Program’s Notice of Intent to plan a post-professional Occupational Therapy Doctorate (OTD) degree. The proposed distance learning program will serve the educational needs of mid-career therapists eager to learn the skills necessary for responding to the ever-changing health and education landscape, and will benefit those requiring their services. The UW-Madison campus has a strong history of providing students with a broad range of health science training at the professional and post-professional levels. The OT Program’s 70 year history of training students to enter the occupational therapy profession will serve it well in this new venture to extend the Wisconsin Idea through the training of post-professional students. The current emphasis on Interprofessional Education in the health sciences is consistent with innovative approaches to retooling therapists for new models of practice and collaboration. The program’s goals of training students to apply research to practice, to engage in advocacy, program development, management and education are consistent with the demands of the contexts within which occupational therapists work. The proposed program will open opportunities for collaboration in inter-professional education.
As the Director of the Doctoral Program at the School of Social Work, I extend my full support for this Educational Innovations proposal in the spirit of interdisciplinary cooperation. I firmly believe the OT Program is in the ideal position to implement this program which has great potential to improve the quality of OT services throughout the state.

Please do not hesitate to contact me if I, or the School of Social Work, can assist you in any way.

Sincerely,

Lawrence M. Berger
Professor and Doctoral Director, School of Social Work
Faculty Affiliate, Institute for Research on Poverty
Subject: Re: Occupational Therapy Letter of Support
From: Tom Oliver <troliver@wisc.edu>
Date: 10/22/2013 11:07 AM
To: dfedwards@education.wisc.edu

Dear Dorothy,

My apologies for missing your earlier message, and thanks for sending these. We will be happy to provide a letter of support from the MPH Program!

Best regards,
Tom Oliver

On Oct 22, 2013, at 10:44 AM, Dorothy Farrar Edwards wrote:

Dear Professor Oliver,

Several weeks ago I wrote to seek your support as the Director of the UW Master of Public Health Program for the Department of Kinesiology’s Notice of Intent to Plan a post-professional Occupational Therapy Doctorate degree. The OT Program recently received an Educational Innovations grant to plan an online, blended learning training program for mid-career therapists interested in pursuing advanced professional skills. We are committed to establishing inter-professional collaborations and support for the program and would value your endorsement of our efforts. As we develop the curriculum we would like to engage in a conversation with you regarding opportunities for cross-listed content and other initiatives that would benefit both our programs.

For your convenience, I am attaching a draft of the Notice of Intent and a draft letter outlining the intent of the OTD program which I hope you will modify to suit your intent. I hope that you will be willing to help us with this request.

Thank You,

Dorothy Edwards

--
Dorothy Farrar Edwards, PhD
Professor and Chair Department of Kinesiology
Departments of Kinesiology-Occupational Therapy Program, Neurology and Medicine
University of Wisconsin, Madison
2176 Medical Science Center
1300 University Avenue
Madison, WI 53706-1532

Office: (608) 262-7421 Office (608)262-0048
Fax: (608) 262-1639
Email: dfedwards@education.wisc.edu

<Notice of Intent - OTD Program.docx><Letter of support_NOI(1).docx>