Canadian Guidelines for Fieldwork Education in Occupational Therapy (CGFEOT)

Guiding Principles, Responsibilities and Continuous Quality Improvement Process

Prepared by the:

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Approved by UFCC, ACOTUP and CAOT

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A Vision for Canadian Occupational Therapy Fieldwork Education

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

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

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

Section 1 of the guidelines includes principles to promote optimum fieldwork education.

Section 2 presents the responsibilities of fieldwork education partners: students, preceptors and university programs. Finally, section 3 proposes tools and processes for supporting quality in fieldwork education.

Section 1: Principles Guiding the Canadian Occupational Therapy Fieldwork Experience

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

The fieldwork experience should:

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

Section 2: Responsibilities of Fieldwork Education Partners

Students are expected to:

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

Preceptors are expected to:

- Act as role models for students;
- Become familiar with the university fieldwork education program (learning objectives, educational tools, fieldwork evaluation tool, expected student performance in accordance with placement level) and with the supervision process;
- Offer a welcoming environment, a comprehensive orientation and provide space for student use, as available within the site's resources;

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

University fieldwork education professors/coordinators are expected to:

- Assist students to develop a good understanding of their "professional growth" with respect to core competencies as described in the *Profile of Occupational Therapy Practice in Canada (2007)* by offering fieldwork preparation (e.g. orientation and resources) and debriefing sessions (e.g. integration of theory with practice) to students;
- □ Provide fieldwork educators with orientation and educational resources related to the university academic and fieldwork education programs and the supervision process;
- Coordinate offers and requests for placements and whenever possible match students and sites according to students' academic and fieldwork profiles and interests;
- □ Ensure students make suitable choices with regard to establishing a varied fieldwork education profile (clienteles and fieldwork settings);
- Offer ongoing support and problem solving to students and fieldwork educators in dealing with student learning challenges;

- □ Recognize fieldwork partners who contribute time and expertise in supervising students;
- □ Provide sites with a fieldwork agreement, either temporary or long term, describing the liability and responsibilities of each party;
- □ Ensure students are provided with appropriate liability coverage and work site insurance;
- □ Regularly assess the content and quality of supervision given and provide recommendations to fieldwork sites and feedback to fieldwork educators.
- Regularly assess the content and quality of the environment in which the placement occurs to ensure appropriate resources are available and provide recommendations to fieldwork sites.

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

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

- 1. The university fieldwork professor / coordinator will ensure that any site used for occupational therapy student fieldwork education has read Section 1 and 2 of this document. An example of a fieldwork site agreement form is outlined in appendix A and may be used for this purpose if the university so chooses.
- 2. The university fieldwork professor / coordinator will provide each site with a fieldwork site profile to complete. The aim of this profile is to provide important information to the university which enables an understanding of the student learning experience within the site. In light of this intent, the fieldwork site profile is completed by the site representative after consultation with administrators, program managers, professional coordinators, fieldwork educators and all persons involved in the fieldwork education experience. This document will be requested within a reasonable timeframe as determined by both the site contact person and the university fieldwork coordinator. The following list describes information to be provided:
 - Site and contact information
 - Characteristics of occupational therapy services
 - Learning opportunities and resources
 - Administrative resources
 - Site requirements for students
 - Amenities

The UBC fieldwork site profile form is outlined in appendix B and should be completed and returned to osot.fieldwork@ubc.ca

Following each fieldwork placement, students should complete a fieldwork site evaluation form. The aim of this evaluation process is to gain an understanding of how the student's learning experience at the site contributed to his or her professional development. The UBC student fieldwork site evaluation form is outlined in appendix C.

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

- 3. On a regular basis (to be determined by the university), the university fieldwork coordinator will review the documents pertaining to particular fieldwork sites: the fieldwork site profile, the relevant student fieldwork site evaluation forms, and the relevant preceptor experience evaluations. The university fieldwork education coordinator will compile and analyze the available information and share a summary with the fieldwork site contact person. It is recommended that the university fieldwork coordinator will provide this feedback to the site at least once every 5 years.
- 4. If issues with a fieldwork site arise, the university fieldwork education professor / coordinator, in conjunction with the fieldwork site contact person, will propose a plan for improving or optimizing the student learning opportunities. When such a plan is put forth, a timeframe will be set regarding improvements to be made to ensure the future quality of the fieldwork education experience for students.

Depending upon specific needs and programs developed, it is anticipated that each university will be responsible for designing and implementing additional quality improvement measures

that are deemed appropriate for their region.

Appendix A: Fieldwork site agreement

Please complete and send to osot.fieldwork@ubc.ca

Fieldwork Site Agreement

Site Nar	me:						
Name of person responsible for occupational therapy student fieldwork coordination and signing on behalf of the organization:							
Title of	person named above:						
Univers	ity name:						
Name o	of university fieldwork education coordinator(s):						
	Declaration of Site Representative						
	I have read and am in agreement with Section 1 of this document, 'A Vision for Canadian Occupational Therapy Fieldwork Education						
	I have read and am in agreement with Section 2 of this document, 'Principles Guiding the Canadian Occupational Therapy Fieldwork Experience						
	I understand that occupational therapists at this site acting as preceptors for occupational therapy students will have at least one year of experience as a practicing occupational therapist, as per the Canadian Association of Occupational Therapy recommendations.						
<u>Name</u> :							
<u>Date</u> :							

Appendix B: Fieldwork site profile

<u>Association of Canadian Occupational Therapy University Programs (ACOTUP)</u>

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

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

Please complete the site profile on the next page and send to osot.fieldwork@ubc.ca

FIELDWORK SITE PROFILE

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

A.	SIT	TE AND AD	MINISTRATION		Da	te:			
	1.	Name of I	Facility:						
	2.	Address:							
	3. Person to whom all clinical correspondence should be directed:								
		Nam	e:		T	itle:			
		Telep	ohone #:		E	xtension:			
		Fax #	t:		E	-mail address:			
	4.	Regular w	orking hours are:	a.m. to	p.m.				
	5.	Dress Coo	le:						
	6. Ple	Other req and CPR) ease State:	uirements: (NOTE: Stu	idents are requi	ired to do crir	ninal record checks	& have c	urrent First Aid	
В.	LE	ARNING EX	(PERIENCE						
 ref 	Stu	 Supe Tead Adm Rese Prof Inte Cons Prog Other 		t personnel) uction of patien rvice/educatior ngs (rounds, cor inary, family, co	n sessions) nferences) mmunity age		Yes	No N	
C. 1. 2.	Lib Ac (If	commodat yes, please	ies available: :ion: e attach details related		lale: Yes son, type of a		ts, etc.)	No No No	
3.	IVIE	eals:	(available at facility)				Yes	NOL	

D. ADDITIONAL INFORMATION

Please attach pertinent documents and/or descriptions to expand on any of the above sections or to include essential information that is not asked above.

Appendix C: Student site evaluation form

UNIVERSITY OF BRITISH COLUMBIA

DEPARTMENT OF OCCUPATIONAL SCIENCE AND OCCUPATIONAL THERAPY

STUDENT EVALUATION OF FIELDWORK EXPERIENCE

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

	FACILITY:										
	SUPERVISOR'S NAM	1E:									
	STUDENT'S NAME:				START DATE						
	STUDENT'S LEVEL:	_			END DATE:						
					_						
	Check the boxes tha	t desc	cribe your fieldwork experi	ence.							
	acute		physical dysfunction		hospital-based	d			urba	n	
	rehab mental health community-bas								rural		
	☐ long term		combined		day centre-ba	sed					
								S	tate _		
	Indicate age span of	client	:S:								
						1			1		
OR	IENTATION					MIDT	TERM		FINA	\L	
We	ere you oriented to t	he fo	llowing:			Y	N	N/A	Y	N	N/A
a)	physical layout (inc	luding	: library, cafeteria)								
b) philosophy and mandate of the facility, general policies (ex: emergency											
	procedrues)										
c)	the staff, other tea	n me	mbers								
						1					

d) physical layout (including: supplies, equipment)]			
		Ш						
e) departmental policies & procedures (ex: charting, home visit,								
reservations, other)								
				<u> </u>				
<u>Comments:</u>								
LEARNING EXPECTATIONS, GOALS & OBJECTIVES	MID	TERM		FINA	FINAL			
	Υ	N	N/A	Υ	N	N/A		
a) Were learning objectives clearly stated at the beginning of placement?								
b) Were learning objectives negotiated based on resources and your	\vdash							
previous experience?								
Comments								
Comments:								
Comments:								
Comments:								
<u>Comments:</u>								
<u>Comments:</u>								
<u>Comments:</u>								
Comments: Supervision	Mio	ΓERM		Fina	AL.			
	Mio ⁻	TERM N	N/A	FINA	AL N	N/A		
SUPERVISION Did the supervisor: a) communicate in an effective manner despite possible differences in			N/A			N/A		
SUPERVISION Did the supervisor: a) communicate in an effective manner despite possible differences in communication style? b) provide you with timely and appropriate feedback (both positive and			N/A			N/A		
SUPERVISION Did the supervisor: a) communicate in an effective manner despite possible differences in communication style?			N/A			N/A		
SUPERVISION Did the supervisor: a) communicate in an effective manner despite possible differences in communication style? b) provide you with timely and appropriate feedback (both positive and			N/A			N/A		

e) consistently clarify expectations?	
f) make themselves available and accessible to questions?	
g) encourage you to develop self-directed learning skills?	
h) encourage you to critically evaluate your own performance?	
Comments regarding the supervision process:	
Suggestions to further your learning experience through the second half of	of this placement:

W	AS THERE OPPORTUNITY TO PRACTICE?		FINAL				
		Y	N	N/A	Υ	N	N/A
a)	interviews						
b)	assessments, tests, measures						
c)	develop problem/asset lists						
d)	plan intervention, target outcomes						
e)	implement intervention plans/therapeutic modalities						
f)	documentation						
g)	evaluation of effects of intervention/outcome						
h)	from a client-centred model of practice						
i)	opportunity to exchange with members of the team,						
	department or program and with other students						
j)	opportunity to participate in various meetings:						
	- in-services, visits to other department						
	- unit or program meetings						
	- case discussions						
,					•	•	
Cor	mments:						
LEA	ARNING EXPECTATIONS, GOALS & OBJECTIVES				FINAL		
					Υ	N	N/A
a)	Was progress towards achieving objectives discussed &	re-evaluat	ted regular	ly?			

b) Do you feel you achieved your learning goals and objectives?		
	1	
<u>Comments:</u>		
What were the most positive aspects of this placement?		
If you could do this placement again, what would you suggest could be done differentl	<u>y?</u>	

Do you have	e any additional comments?		
		Signature:	
			Student
			Therapist
			·
			Date
Copies to:	Student		
	Site/program		
	LIBC (with student evaluation)		
	UBC (with student evaluation)		

Appendix D: Preceptor experience evaluation example survey

A link to the online version of the survey below is sent out to preceptors at the end of each placement block.

Preceptor Feedback Survey

Start of Blo	ck: Genera	l Informa	tion								
The purpose of the infortake this op	mation you portunity t	provide o advise (will remair	n completing the fiel	ely confide dwork pro	ential - if y gram.	ou have a	iny sugges	tions plea		
Q1 Please e	enter the fo	llowing ir	nformation								
○ Fac	ility (Optio	nal) (1) _									
O You	ır Name (O	ptional) ((2)								
O Lev	el of Placer	ment (4)									
O Sta	rt & End Da	ite (5)									
Q2 Check th	he boxes th		be your fie								
Acute (1)	Rehab (2)	Long Term (3)	Phys. Dys. (4)	Mental Health (5)	Combin ed (6)	Hospita I Based (7)	Comm. Based (8)	Day Centre Based (9)	Urban (10)	Rural (11)	Other (12)

Skip To: Q4 If Check the boxes that describe your fieldwork area: != Other	
Q3 Please describe your practice area:	-
Q4 Please indicate the age span of clients:	
End of Block: General Information	
Start of Block: Pre-Placement Organization	
Q5 Was your package and pre-placement information complete, accurate, and recommanner?	eived in a timely
O Yes (1)	
O No (2)	
○ N/A (3)	
Q6 Were your questions about the placement responded to in a helpful, collaborat manner by the Academic Fieldwork Coordinator or assistant?	cive, and timely
O Yes (1)	
O No (2)	
O N/A (3)	

Q7 Were instructions for forms and procedures clear?	
O Yes (1)	
O No (2)	
O N/A (3)	
Q8 Please enter any general comments you have regarding the organization of the p	placement:
End of Block: Pre-Placement Organization	
Start of Block: Preceptor Support	
Q9 Did you receive helpful and timely support in dealing with student (or other) issu	ues?
O Yes (1)	
O No (2)	
O N/A (3)	

Q10 Did you access any information on the Fieldwork Education section of the UBC Occurscience & Occupational Therapy department website? (www.osot.ubc.ca/fieldwork/clinical)	
O Yes (1)	
O No (2)	
O N/A (3)	
I was not aware there was a website (4)	
Q11 Do you have any suggestions for content you would like to see included in the Fields section of our website?	work Education
Q12 Did you access any information on the UBC OT Fieldwork Education Blog? (www.ubcfieldwork.wordpress.com)	
O Yes (1)	
O No (2)	
O N/A (3)	
I was not aware there was a fieldwork education blog (4)	

Q13 Do you Education Bl	have any suggest og?	ions for conter	nt you would lik	e to see include	ed on the UBC C	OT Fieldwork
nd of Block	: Preceptor Supp	ort				
	k: Student Exper		enared for thei	r level of places	ment? (Please)	keen in mind
-	nowledge related	· · ·	-			
	Definitely Unprepared (1)	Somewhat Unprepared (2)	Neither Unprepared or Prepared (3)	Somewhat Prepared (4)	Definitely Prepared (5)	Don't Know/Can't Answer (6)
(1)	0	0	0	0	0	0
Q15 Do you 	have any comme	nts regarding s	tudent prepara	tion? 		

	Definitely Unreasonable (1)	Somewhat Unreasonable (2)	Neither Unreasonable or Reasonable (3)	Somewhat Reasonable (4)	Definitely Reasonable (5)	Don't Know/Can Answer (6
(1)	0	0	0	0	0	0
7 Please e	explain:					

End of Block: Student Experience