



COLLEGE of **PHARMACY** *and* **HEALTH SCIENCES**  
DEPARTMENT of **OCCUPATIONAL THERAPY**

## DOCTORAL EXPERIENTIAL CAPSTONE MANUAL

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Department of Occupational Therapy  
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This manual is intended to provide instruction and guidance regarding the Western New England University (WNE) Occupational Therapy Doctoral Experiential (DEX) Capstone program. The handbook contents are subject to change, and the program reserves the right to make partial or whole adjustments at any time. These policies are reviewed annually and revised as necessary. WNE Occupational Therapy Doctoral students are responsible for adhering to the manual guidelines and procedures throughout their program attendance.

# DOCTORAL EXPERIENTIAL CAPSTONE WELCOME

The entry-level Doctor of Occupational Therapy (OTD) is a first-professional (or clinical) graduate education credential. The first OTD program was accredited by the American Occupational Therapy Association (AOTA)/Accreditation Council of Occupational Therapy Education (ACOTE) in 1998. Of the over 600 OT education programs in the United States, there are currently 102 accredited OTD programs. In 2019, Western New England University became the third OTD program in New England to earn AOTA/ACOTE accreditation. The program is very proud of this achievement and pledges to continue making changes that support AOTA and ACOTE guidelines.

At Western New England University, the Doctoral Capstone is called the Doctoral Experiential Capstone or the “DEx”. The DEx Capstone provides us with opportunities to apply OT education in innovative ways. This can occur with a variety of populations in both traditional and non-traditional settings, and in settings where there has never been occupational therapy. DEx teams use collaborative inter-professional strategies, attend to the strengths and needs of populations and settings, and bring the most current research and scholarship to the “front lines” of service in our community. These opportunities for advocacy and program development place students, faculty, and community partners in the position of leading the profession forward.

I am pleased to introduce this transformational educational opportunity to you in the pages of the Doctoral Experiential (DEx) Capstone manual. Whatever your reason for reading this, it is my hope that you will be involved and engaged in our DEx projects, whether as a student, a mentor, an observer, a planner, a participant, or a reviewer. We believe that we can make a positive difference in our community and contribute to education, healthcare, and social services in meaningful ways. The faculty and leadership of the Department of Occupational Therapy at WNE support your educational endeavors and we look forward to witnessing your contributions to the profession of Occupational Therapy.



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# ENTRY-LEVEL DOCTOR OF OCCUPATIONAL THERAPY DOCTORAL EXPERIENTIAL CAPSTONE MANUAL

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## DEPARTMENT OF OCCUPATIONAL THERAPY

### WESTERN NEW ENGLAND UNIVERSITY DOCTORAL EXPERIENTIAL CAPSTONE MANUAL

This manual describes the general policies and procedures for the Western New England University (WNE) entry-level Doctor of Occupational Therapy (OTD) program, including the responsibilities of students, faculty mentors, and site mentors.

### MISSION AND VALUES

The Department of Occupational Therapy advances the mission of Western New England University (WNE) through its commitment to developing and sustaining a professional education program that will contribute to the global healthcare workforce of the future. The academic division is well-positioned to deliver an innovative entry-level doctoral program that prepares its graduates to be transformative agents of change in the healthcare marketplace of today and tomorrow. This is the outcome of supporting a professional faculty, who combine practice expertise, teaching excellence, and commitment to scholarship.

Beyond the educational preparation of ethical, autonomous, culturally competent, and client-centered occupational therapy practitioners, the Doctor of Occupational Therapy (OTD) Program is unique in its commitment to developing professional scholars and community leaders who will shape new visions of occupational therapy practice. Guided by population health and interprofessional practice and interprofessional education perspectives, this commitment is exemplified by:

*Course content on occupational justice, health disparities, health literacy, and information/assistive technology.*

*Case-based laboratory simulation experiences promote the development of real-time problem solving and clinical reasoning.*

*Opportunities for multiple field-based experiences in traditional and community-based practice areas and organizations; and*

*Student-driven collaborative team building which supports an interprofessional framework for site-specific services.*

## PROGRAM GOALS

To develop and implement a forward-thinking entry-level Doctor of Occupational Therapy (OTD) Program that prepares graduates for leadership in global health care, education, and community service.

To ensure that graduates are provided with a conceptual framework and applied strategies to excel at client-centered, evidence-based, collaborative interprofessional practice. This will result in a critical outcome of the OTD program; a means to transform the way that patients/clients receive care in medical, educational, and community-based settings.

Academically develop and support a high-quality graduate occupational therapy faculty who excel in professional teaching, learner mentorship, and scholarship roles in ways that will enhance the reputation of the Department, the College of Pharmacy and Health Sciences (COPHS), and Western New England University (WNE).

To report doctoral capstone outcomes annually to Administration (ACOTE Standard A.6.3.).

Enhance the image and visibility of the Department of Occupational Therapy within the College of Pharmacy and Health Sciences.

## THE DOCTORAL EXPERIENTIAL CAPSTONE

The purpose of the Doctoral Experiential Capstone is for students to apply the knowledge and skills gained during their OTD academic courses and Level I and II fieldwork experiences in ways that challenge and perhaps transform the delivery of health, educational, and social services. Through designing and implementing a community experiential and a scholarly project that specifically responds to the needs of a population and setting, students experience the roles of reflective practitioner, transformative leader, and innovative designer. The Doctoral Experiential Capstone includes a complex interrelated field experience and a scholarly project that is coordinated by a student, university, and community team.

## ACCREDITATION

The profession of occupational therapy has only recently begun offering and accrediting entry-level (first professional degree) doctoral programs. The newly developed accreditation standards emphasize leadership, advocacy, scholarship, consultation, and advanced practice as central to the doctorate in occupational therapy. These accreditation standards, the literature on graduate and professional education in occupational therapy and other professions, and collaborative consultation from other occupational therapy education programs form the basis for the development of our program and especially of our Doctoral Experiential Capstone project.

The entry-level (first professional degree) Doctor of Occupational Therapy (OTD) Program at Western New England University (WNE) has been designed to meet and exceed the standards set for OTD programs by the Accreditation Council for Occupational Therapy Education (ACOTE) standards for the entry-level OTD require

a Capstone Experience and a Capstone Project. The Occupational Therapy Practice Framework-4 (2020) provides the definition. "Capstone Project: A project that is completed by a doctoral-level student that demonstrates the student's ability to relate theory to practice and to synthesize in-depth knowledge in a practice areas that relates to the capstone experience". At WNE, we refer to these as the Doctoral Experiential Capstone or the DEx. This includes a Community Experiential (Capstone Experience) and a Scholarly Project (Capstone Project) that have been designed to meet or exceed the following ACOTE (effective July 31, 2025) standards:

*"D.1.0. DOCTORAL CAPSTONE*

*The goal of the [doctoral capstone](#) is to provide in-depth exposure to one or more of the following areas in occupational therapy:*

- *Clinical skills*
- *Research skills*
- *Administration*
- *Program development and evaluation*
- *Policy development*
- [Advocacy](#)
- *Education*
- *Leadership*

*The doctoral capstone consists of two parts:*

- *Capstone experience*
- *Capstone project*

*The student will complete a 14-week capstone experience and an individual related capstone project to demonstrate synthesis and application of knowledge gained.*

*The doctoral capstone coordinator will:*

*D.1.1. Collaboration for Designing the Doctoral Capstone*

*Ensure that the doctoral capstone is designed through collaboration with the student, a faculty member in the occupational therapy educational program who holds a doctoral degree, and an individual with documented expertise in the content area of the capstone.*

*D.1.2. Content Expert for Doctoral Capstone*

*Document that the content expert is informed of the plan for and purpose of the doctoral capstone and has content expertise in the focus area.*

*D.1.3. Design and Preparation of Doctoral Capstone*

*Document that the doctoral capstone is an integral part of the program's curriculum design and:*

- *Reflects the mission and philosophy of the program.*

- *Contributes to the development of in-depth knowledge in the designated area of interest.*
- *Includes preparation consisting of a literature review, needs assessment, goals/objectives, and a plan to evaluate project outcomes. This must be completed prior to the commencement of the 14-week doctoral capstone experience.*

*The doctoral capstone must be started after completion of all coursework and Level II Fieldwork.*

#### *D.1.4. Experiential Plan and Written Agreements for Doctoral Capstone*

*Document that the process for ensuring valid written agreements between the organization and the program are in effect prior to and for the duration of the capstone experience. Ensure that there is a valid plan for the individual doctoral capstone experience that, at a minimum, includes:*

- *Individualized specific doctoral capstone experience objectives*
- *Plans for evaluation, supervision, and mentoring*
- *Responsibilities of all parties*

*This agreement must be signed by parties.*

#### *D.1.5. Length of Doctoral Capstone Experience*

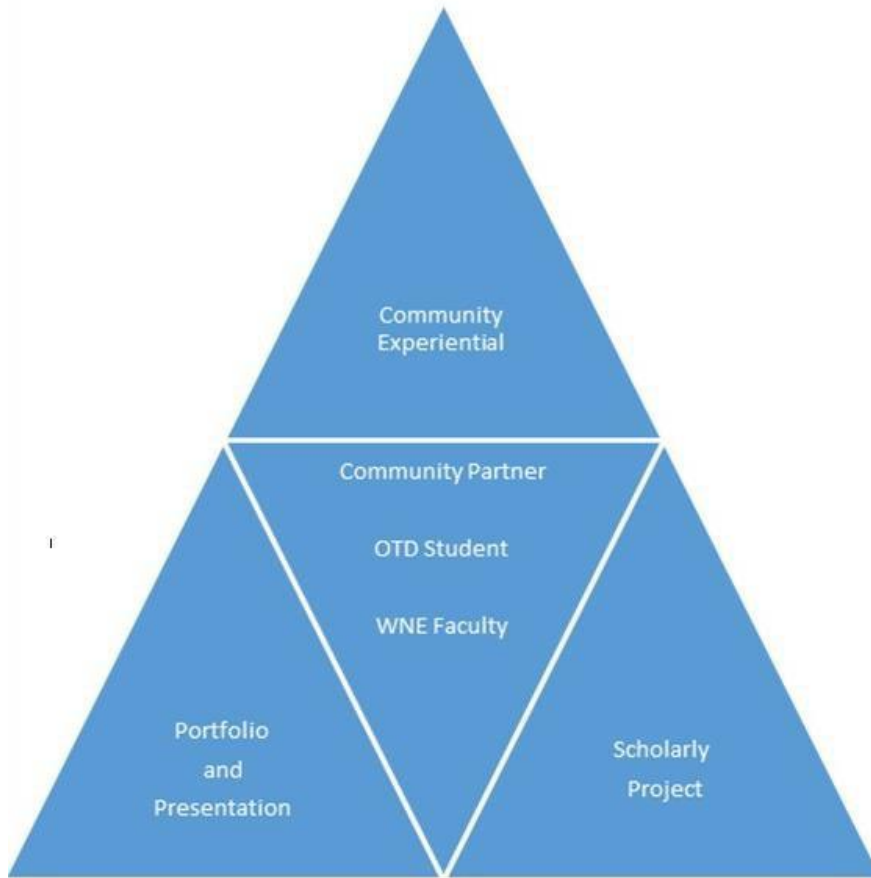
*Require that the length of the doctoral capstone experience be a minimum of 14 weeks' full-time, and a minimum of 32 hours per week. This may be completed on a part-time basis as agreed upon by the organization and must be consistent with the individualized specific objectives and capstone project. This must be equivalent in length to 14 full-time weeks of at least 32 hours per week. The program must have a mechanism to document that the students meet the requirements for capstone length. Prior fieldwork or work experience may not be substituted for this doctoral capstone experience.*

#### *D.1.6. Doctoral Capstone Project*

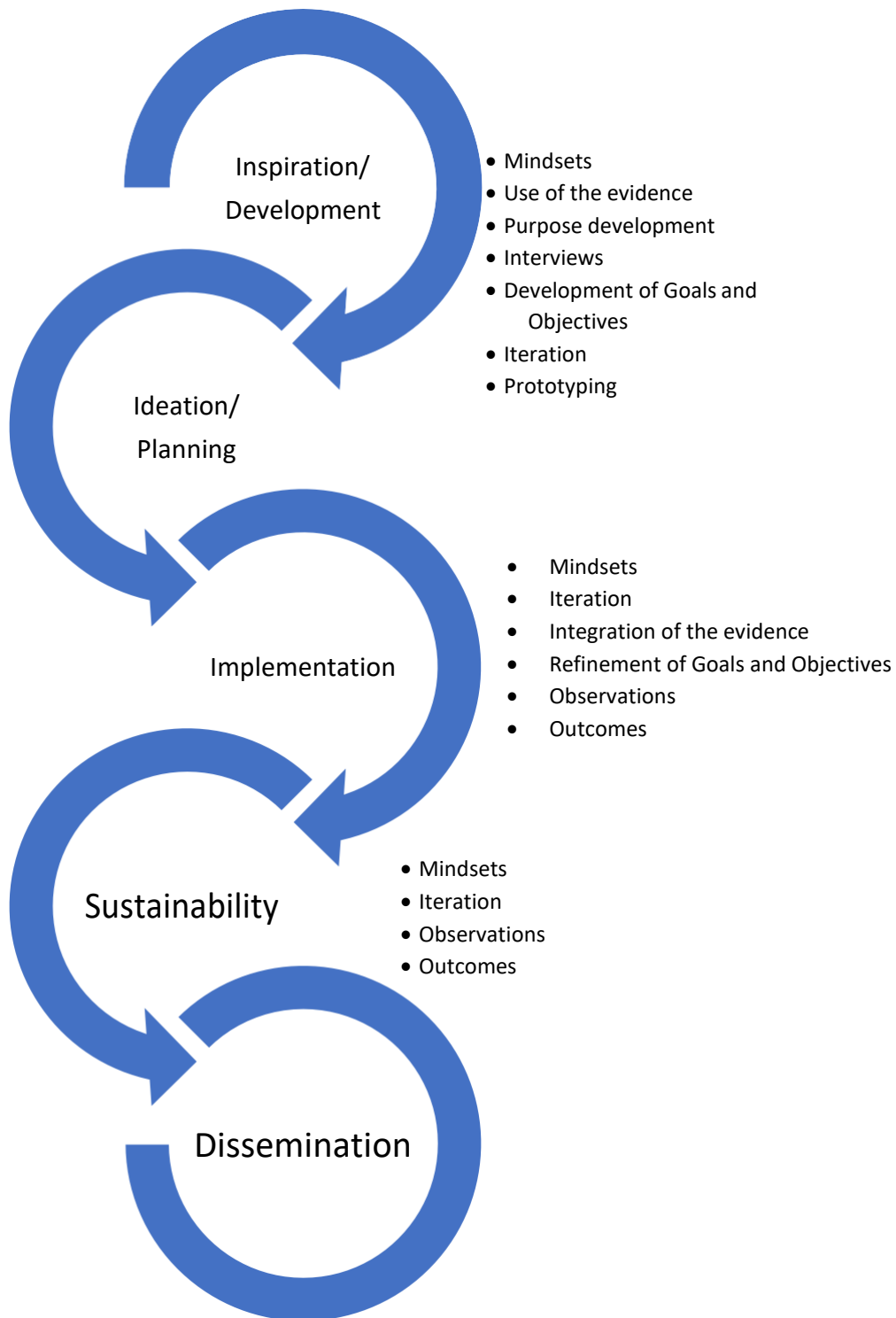
*Ensure completion and dissemination of an individual doctoral capstone project that relates to the doctoral capstone experience and demonstrates synthesis of in-depth knowledge in the focused area of study.*

#### *D.1.7. Evaluation of Doctoral Capstone*

*Document a formal evaluation mechanism for objective assessment of the student's performance during and at the completion of the doctoral capstone (ACOTE, 2023)''*



Deiuliis, E. D., & Bednarski, J. A. (2020). *The entry level occupational therapy doctorate capstone: a framework for the experience and project*. Slack Incorporated.

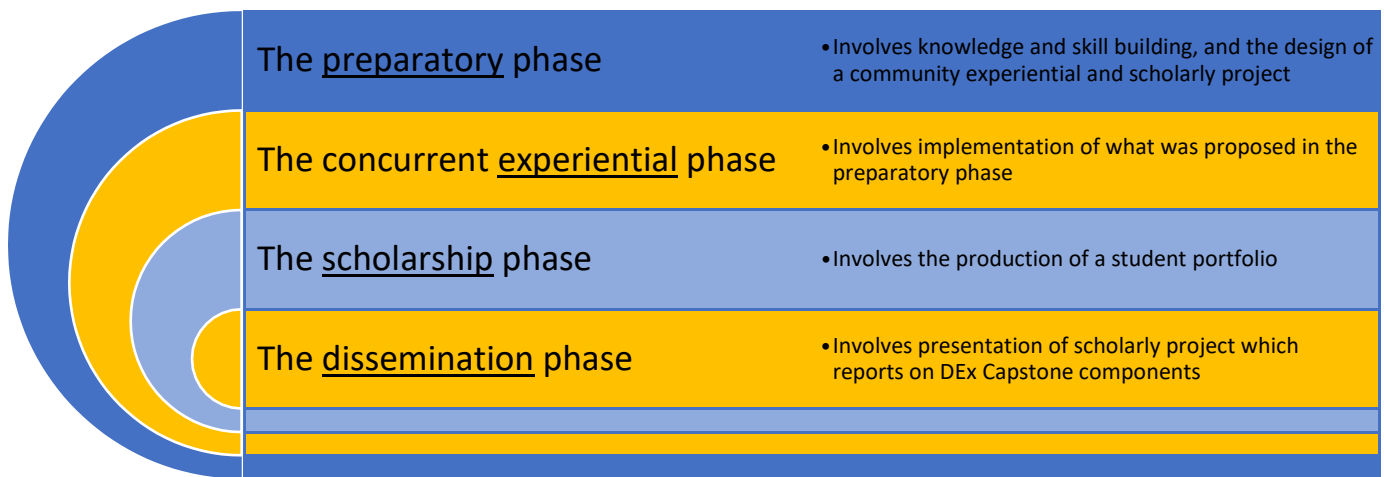


The WNE OTD DEx Capstone is designed to assess and serve the needs of the population and setting of a community partner organization such as a hospital, clinic, school, health care, social service, advocacy, or educational organization. It has two components. One is a community experiential, and the other is a scholarly project. Both take place during a 14-week (448 hour) DEx Capstone placement at a community organization. Throughout the preparation for the project, students engage in scaffolded active learning experiences that are transformative in their professional journey. These experiences offer a foundation that students apply within their individual but diverse project settings. Initially, using a service learning and consultation approach, students learn about the population, communities, and organizations serving them. They assess organizational strengths and challenges related to services provided and population needs. They also participate in the daily activities of the organization as needed. At this time, the DEx Capstone team (student, faculty, site, and peer mentors) focuses on updating the preliminary needs assessment and literature review, incorporating any new information into the DEx Capstone proposal/plan. Then, specific projects and activities, targeted at the identified needs, are designed and implemented. For example, in a DEx Capstone 2020 project, aimed at assisting a hospital with falls prevention research and service, the DEx Capstone team identified a need to update teaching materials. In response, they incorporated their knowledge about falls prevention, media and instructional design, occupational therapy, and cultural humility into a significant revision of the program's falls prevention PowerPoint presentation and patient education materials. This work was scholarly in and of itself, representing Boyer's Scholarship of Teaching and Learning and Boyer's Scholarship of Integration. However, they further investigated the success of their revised program by pilot testing it on a small audience, with good results. This illustrates how the specific roles and responsibilities of the OTD student evolve during the community experiential and the scholarly project and that they are determined via an ongoing collaborative planning process and documented in a continually evolving DEx Proposal/Plan.

Appropriate supervision and mentorship are built into the planning and implementation processes. As OTD students will not have completed their OTD professional educational program by the time they begin the community experiential and the scholarly project, they are not yet able to practice occupational therapy independently. All student plans and activities must be within the limits of the practice act for their state. The DEx Capstone can occur in a setting where there is no OT, and the site mentor/consultant can be someone qualified in another field. This is encouraged because these opportunities are believed to facilitate the practice of interprofessional collaboration, provide insight into the needs of different populations and settings, and allow exploration of the potential role and contributions of OT in new areas.

Through experiential education, students are expected to learn about themselves and their community, imagine and innovate in response to identified need, understand organizational development and function, and apply the skills and knowledge gained in the academic and fieldwork components.

## WNE OTD DOCTORAL EXPERIENTIAL CAPSTONE: FOUR PHASES



Deluliis, E. D., & Bednarski, J. A. (2020). *The entry level occupational therapy doctorate capstone : a framework for the experience and project*. Slack Incorporated.

The preparatory phase occurs first, beginning in Year One, Semester Three of the OTD program, and extending through the Year Two, Semester Two. It is synchronous with academic and Level I fieldwork courses. In this phase, students learn foundational research and evidence-based practice strategies to complete the Doctoral Experiential Capstone. They learn how to conduct a needs assessment and develop both a scholarly project proposal and a community experiential project plan. At the culmination of that phase, they present a written DEx Capstone Proposal, including a work plan with delineation of responsibilities and timelines for project completion, to a faculty panel for review and approval. A format for this proposal and detailed instructions is provided by the WNE OTD program (Appendix A). The proposal includes:

For the scholarly project: Plans for ongoing review of the literature, a clearly stated preliminary research question, a methodology for answering that question, and planned strategies for data collection and analysis.

For the community experiential: A detailed outline of planned activities which include a formal needs assessment as well as daily participation - working with and learning about the population and services of their partner organization.

The experiential phase may occur in sequence, or simultaneously, depending on the design of the DEx Capstone. Although there is often preparation in advance the focus of the DEx Capstone implementation activities includes both experiential and scholarship.

The scholarship phase may occur in a sequence or simultaneously with the experiential phase.

The dissemination phase follows the completion of the doctoral community experiential and scholarly project and involves presentation(s) to a faculty panel, the WNE community, and the site organization.



The development of the DEx Capstone proposal/plan begins during the summer semester of the first year of the program in OTD 541 Doctoral Experiential 1: Needs Assessment & Program Development, and OTD 544 Doctoral Experiential 1: Mentorship Seminar. It is further developed during the fall semester of the second year of the OTD program in the courses OTD 631 Doctoral Experiential 2: Proposal Development and OTD 634 Doctoral Experiential 2: Mentorship Seminar. Final refinement, planning, and development occur during the spring of the second year in OTD 651 Doctoral Experiential 3: Pre-Implementation Planning and OTD 654 Doctoral Experiential 3: Mentorship Seminar. Descriptions of these courses can be found in Appendix B.

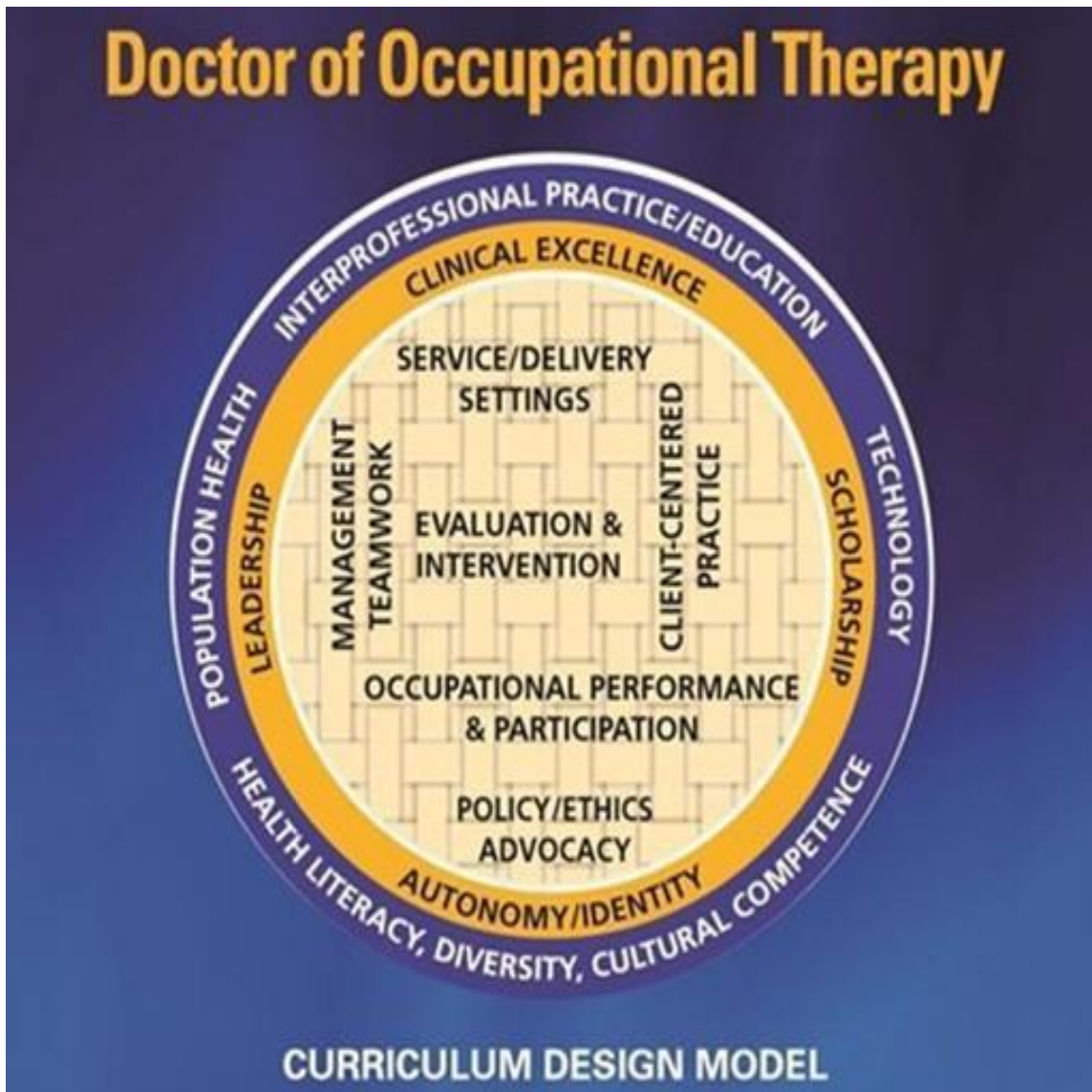
During the Summer of Year Two and Fall of Year Three, OTD students complete their six-month full-time Level II Fieldwork Experiences. During this time, students and mentors are expected to be in contact with each other and with the Doctoral Experiential Coordinator to ensure that the DEx proposal and other required documents are complete and up to date and that any necessary arrangements (i.e., transportation, housing) and plans are in place well in advance of the start of the DEx.

The experiential and scholarship phases of the project usually occur during the 14-week time period scheduled for DEx Capstone Implementation, as they are deeply connected activities. The DEx Capstone is scheduled to run from January through April of the third year, immediately following the completion of Level II Fieldwork. For example, a student group may have conducted a literature review and needs assessment related to homelessness in the Springfield area which reveals a need for support and education for care providers. Their proposal for the Doctoral Experiential Capstone summarizes these findings and then articulates a research question such as “Will an occupation-based in-service training program increase caregiving competencies and reduce stress for staff at homeless shelters and day programs?” It will also include a brief description of how the students will spend the required 448 hours of experiential learning at local homeless shelter(s), how they will design, provide and evaluate the occupation-based in-service education program, how they will collect and analyze data about staff competencies and stress, and how they might best prepare (format) and present their project findings. The implementation of the proposal, including the 448-hour community experiential and the scholarly project will occur in the final semester of the third year of the program in OTD 781 Doctoral Experiential 4: Implementation/Capstone and OTD 784 Doctoral Experiential 4: Mentorship.

Students prepare for the dissemination phase beginning in the second and third years of the program as they finalize plans for their project(s), collaborate with their mentors, and begin to execute their Doctoral Experiential Capstone workplan. At that time, they will decide what is the best format to represent and disseminate their project results (i.e., Poster, PowerPoint presentation, Video, Lecture, Publishable Paper, etc.). This phase culminates in the preparation and presentation of a reflective e-portfolio, which includes a copy of the approved Doctoral Experiential Capstone proposal, the community experiential product(s), the scholarly product(s), a copy of their professional presentation, responses to reflective questions, references and resources. This e-portfolio with a final project presentation is then presented to a faculty and external reviewer panel, the WNE community, and the site organization during the summer semester of the third year of the OTD program. Students also present a professional poster to the WNE and surrounding community and submit a final report that is published to the WNE Library. These experiences are components of courses OTD 781 and OTD 784. Once completed, the student is eligible to graduate.

# RELATIONSHIP OF THE DOCTORAL EXPERIENTIAL CAPSTONE TO THE OTD CURRICULUM

Not unlike a tapestry, the WNE OTD curriculum design represents a series of interconnected conceptual themes (outer border), programmatic threads (inner border), and interwoven filaments (core), illustrated here. These core components are exemplified in AOTA's Vision for 2025, operationalized in the Occupational Therapy Practice Framework: Domain and Practice -4<sup>th</sup> edition (AOTA, 2020), and codified in the Occupational Therapy Official Documents. The curriculum model is evident in all academic, lab, and field experiences offered by the program.



The WNE OTD curriculum has been designed so that didactic and fieldwork courses lead to and culminate in the Doctoral Experiential Capstone. The Doctoral Experiential Capstone directly links interprofessional practice and interprofessional education with scholarship. Collaboration with sponsoring sites for educational, clinical, and research-based interprofessional projects promotes autonomy/identity, professional reasoning, management, leadership, research, and clinical/consultative skill, technology, health literacy, diversity, cultural competence, and population health.

The concepts of scholarship and community service that characterize the Doctoral Experiential Capstone are infused throughout the OTD curriculum. While much of the curriculum is oriented towards preparation for clinical occupational therapy practice, the Doctoral Experiential Capstone challenges students to integrate and apply course and field-based knowledge in new ways, to be autonomous and self-directed as learners, and to collaborate with academic faculty and community partners to begin a lifelong practice as transformational occupational therapists.

Specific Doctoral Experiential Capstone courses and field experiences require students to learn about and practice assessment of needs, management of resources, collection, analysis, and interpretation of data, presentation of information to others, and collaboration with university and community partners. These courses provide students with an in-depth, customized Doctoral Experiential Capstone and the opportunity to extend, refine, and hone the knowledge and skills garnered throughout the didactic and fieldwork components of the program. It also offers them an opportunity to transform the health care and educational environment because of their Doctoral Experiential Capstone.

As each OTD student progresses through the sequence of Doctoral Experiential Capstone courses, they design and carry out their planned Doctoral Capstone Experiential Projects. Through placement at a community organization (community experiential) and carrying out a related scholarly project, they engage in learning experiences framed around the concepts of leadership, transformative learning, and interprofessional education and practice. Of the eight areas identified in the ACOTE standards, the WNE OTD will primarily focus on those that are italicized here: *Clinical practice*, Research, Administration, *Leadership*; *Program and Policy Development*; *Advocacy*; *Education*; Theory Development.

## EXAMPLES OF DOCTORAL EXPERIENTIAL CAPSTONE PROJECTS

Clinical Practice Skills	OT Practice in the Neonatal Intensive Care Unit (NICU) requires advanced clinical and interprofessional skills beyond entry-level but there is little formal training for this area of practice	Work with OTR and other clinicians in Neonatal Intensive Care Unit (NICU) including participation in evaluation, intervention, consultation, and research activities. Data collection on practice knowledge and skills	Baystate Health NICU	Module for teaching NICU knowledge and skills to entry-level students in Allied Health
Research Skills	Is a parent/teacher interview more accurate than child observation to determine levels of child motor development	Work in four local child development centers to support the development of challenging indoor and outdoor play. Collect data on motor development via interview and observation and conduct statistical analysis	YMCA Preschools	Academic paper (report) and Presentation for Preschool Enrichment Team
Administration	Can a University sponsored clinic influence population health in an urban area?	Work with local health centers and agencies to design and locate a campus clinic serving community members in need. This would include planning for licensing, insurance, reimbursement, marketing and service delivery	Area Council on Aging	Academic paper (report) and written plans for program revision and continuation
Leadership	What do transformative leaders in health care identify as essential skills for new clinicians in Occupational Therapy	Using the Leadership Practice Inventory, transformative leaders in a large hospital system were identified. Focus Group data was collected about the future of health care and the skills they expect for entry-level occupational therapists	Trinity Health Care System	Article manuscript for OT in Health Care
Program and Policy Development	Can occupational therapy services meet a distinct need in the service delivery system for people who are homeless?	Working with area agencies, develop a grant-funded program to include occupational therapy services in the current caregiving system for people who experience homelessness	National Coalition for the Homeless, Friends of the Homeless	Grant proposal
Advocacy	Does the Affordable Care Act protect individuals with disabilities?	Working in the offices of local senators and representatives who sit on the health care and in the office of the Disability Law Center, identify pathways for effective care	State Legislature, Disability Law Center	Academic Report

## STUDENT LEARNING OUTCOMES

OTD Students will demonstrate, through observed professional interactions and through reflective and professional writing, that they have become self-aware, self-determined learners, competent entry-level practitioners, and transformative leaders.

WNE OTD Curricular Theme or Thread	As measured by:
<u>Interprofessional Education/Practice</u>	Documentation of experience in collaboration for program or service delivery with professionals and/or members of consumer groups who are not occupational therapists. This includes being able to negotiate the role of occupational therapy as part of an interprofessional team.
<u>Population Health</u>	Documentation of a needs assessment for a particular population and using said assessment as the foundation for planning a successful Doctoral Experiential. Additional evidence will include feedback from consumers that indicate the impact of the project on the population they represent.
<u>Technology and Health Literacy</u>	Demonstrated proficiency with the use of personal computers, learning platforms, electronic health records and assistive technology sufficient to fully document the Doctoral Experiential for WNE as well as for members of the population served by that project
<u>Diversity and Cultural Competence</u>	Recognize and be able to describe the diverse systems of service delivery that are the most cost-effective and considerate for health, social, and educational settings, both traditional and nontraditional. Through both clinical and reflective writing, be able to articulate a sensitivity to cultural, linguistic, and other diversities and describe solutions for care disparities
<u>Leadership</u>	Documentation of the ability to work with others to identify meaningful objectives, organize, manage, and motivate people and resources, communicate effectively, and oversee action to accomplish the stated program or service goals.
<u>Clinical Excellence</u>	Through both clinical and reflective writing, be able to articulate the clinical reasoning (procedural, interactive, narrative, ethical, scientific, pragmatic) process that they use during planning, delivery, and evaluation of population-based and evidence-driven occupational therapy services.  Demonstrate the ability to implement, in existing programs, and plan for in developing programs, an occupational therapy process that is occupation-based, client-centered, culturally sensitive, and ethically appropriate
<u>Scholarship</u>	Documentation of an experiential and scholarly project that reflects the literature in the field and uses responsive, ethical methods. The experiential and scholarly process and results should be made accessible to the college and the community, especially to the population served by the project. A report of the project, presented in a professional format that others can replicate or build upon, will be evidence of accomplishment
<u>Autonomy/ Identity</u>	Through both clinical and reflective writing, be able to articulate a clear awareness of their own personal and professional strengths and boundaries and identify supports and strategies for goal achievement

## DOCTORAL EXPERIENTIAL CAPSTONE ADMINISTRATION AND SUPERVISION

The WNE OTD Doctoral Experiential Capstone is accomplished through a mentorship model. This is defined in the 2023 ACOTE standards as

“... a relationship between two people in which one person (the mentor) is dedicated to the personal and professional growth of the other (the mentee). A mentor has more experience and knowledge than the mentee. (p.38)”

Each OTD student has a WNE OTD Faculty Mentor, a Site Mentor, and Peer Mentors (other students in their mentorship group) for their Doctoral Experiential Capstone. In the Spring semester of the first year of the OTD program, Faculty Mentors identify an area(s) of scholarly interest and/or clinical expertise that will frame the selection of Doctoral Experiential Capstone projects. Students then indicate their preferences for the topic area(s) and/or faculty mentor(s), and they are assigned to a mentorship group.

Each faculty member is responsible for the assigned mentorship group (3 – 5 students) throughout their Doctoral Experiential Capstone. They work together to develop, implement, and evaluate Doctoral Experiential Capstones that are independent and individual but that are also related to each other and to the overall topic area. OTD students may decide to collaborate with other students to implement a team-based DEx Capstone or they may choose to work individually. In either case, they rely on their group members for peer mentorship, feedback, and support. DEx Capstone groups are unified by shared interests and DEx Capstone focus.

The OTD Leadership Team (Department Chair/Program Director, Assistant Program Director, and Academic Fieldwork Coordinator) is responsible for the administration and management of the OTD program, including the DEx Capstone. The specific responsibilities of the WNE OTD Assistant Program Director include service as the Doctoral Experiential Capstone Coordinator. Primary advisory responsibility for each individual DEx Capstone resides with the assigned OTD faculty member who is referred to as the Faculty Mentor (may or not be the student’s academic advisor) and a Site Mentor who represents the community/agency partner.

Once a DEx Capstone site has been selected and a preliminary verbal agreement is reached, the WNE OTD Doctoral Experiential Capstone Coordinator and the WNE OTD Faculty Mentor review the Site Mentor Qualification Form (Appendix C) and curriculum vitae or resume to establish qualification to serve as Site Mentor. Once qualification has been established and the Site Mentor has agreed to serve, a Memorandum of Understanding (MOU) (Appendix D) is then negotiated with the site and a Doctoral Experiential Capstone Mentorship Agreement (Appendix E), which outlines the objectives and responsibilities for the specific Doctoral Experiential, is completed.

Negotiation of the DEx Capstone MoU and the DEx Capstone Mentorship Agreement should take place approximately one year before the Doctoral Experiential Capstone is implemented. This allows sufficient time to plan for the details of both the experiential and the scholarly components. The responsibilities of the Coordinator, the Mentors, and the student are described here.

## DOCTORAL EXPERIENTIAL CAPSTONE COORDINATOR (DCC)

The responsibilities of the Doctoral Experiential Capstone Coordinator include:

*Coordination and oversight of the development of Doctoral Experiential Capstone Policies and Procedures;*

*In consultation with the WNE Attorney, development and negotiation of the Doctoral Experiential Capstone Memorandum of Understanding/Agreement;*

*Reviewing the CV, resume, and supporting documents of site mentors to verify that the site mentor is qualified to serve. This ensures that the student is mentored by an individual with expertise consistent with the student's area of focus. This individual may or may not be an occupational therapist;*

*Coordination and collaboration with University, College, Department, and Program administrators, faculty, and staff to assure that the Doctoral Experiential Capstone Program follows the appropriate rules and procedures;*

*Plan and convene Doctoral Experiential Capstone meetings, including training;*

*Develop and maintain communication systems for collaboration and accountability;*

*Guide the Doctoral Mentorship courses and the Doctoral Experiential Capstone;*

*Oversee the development and presentation of Doctoral Experiential Capstone portfolios; and*

*Annually evaluate and report the outcomes of the Doctoral Experiential Capstone program (Appendix F).*

## DOCTORAL EXPERIENTIAL CAPSTONE FACULTY MENTOR (FM)

The Faculty Mentor is a WNE OTD faculty member who has expertise in an identified area(s). The Faculty Mentor is matched with and responsible for the supervision and mentorship of a small group of students throughout the Doctoral Experiential Capstone. In the fall semester of the second program year, students are assigned an OTD faculty member to serve as their Doctoral Experiential Capstone faculty mentor. This assignment reflects the alignment of faculty expertise and student interests as well as compatibility of learning and supervision styles. Student Doctoral Experiential Capstone teams may, on occasion, find it helpful to informally consult with other faculty or community members in areas of their expertise or experience. The responsibilities of the faculty mentor include:

*Coordinate Doctoral Experiential Capstone group supervision meetings with students who have registered for the assigned Doctoral Mentorship section;*

*Supervise the conceptualization and development of each group members Doctoral Experiential Capstone proposal, including oversight, review, final approval and grading of the implementation project;*

*Supervise the conceptualization and development of each group members Doctoral Experiential proposal, including oversight, review, final approval and grading of the implementation project;*

*Participate in the recruitment of and negotiation with community partners regarding site and mentorship agreements and detailed plans for roles, responsibilities, schedules and communication plans for the Doctoral Experiential Capstone;*

*Communicate and provide feedback regularly to the team, especially the students, in person, via Skype, telephone, email or other methods;*

*Collaborate with the site mentor and leadership team on any concerns regarding student performance, site management, etc.;*

*Supervise the implementation of the Doctoral Experiential Capstone work plan using evidence-based mentoring and teaching strategies;*

*Evaluate the student's performance and progress at mid-point (@ 7 weeks) and at the end of the Doctoral Experiential Capstone using the DEx Capstone Learning Objective & Evaluation Plan (Appendix G); and*

*Support, review and finally approve the report and presentation of the project outcomes and findings and grading of the mentorship and implementation courses.*

## DOCTORAL EXPERIENTIAL CAPSTONE STUDENT

The Doctoral Experiential Capstone Student is a WNE OTD student in good standing who actively participates in the Doctoral Experiential mentorship process while completing all the academic and fieldwork requirements of the program. Following completion of these requirements, the student registers for and participates in an individualized Doctoral Experiential as described in their proposal and other relevant documents. The responsibilities of the DEx Capstone student include:

*Completing all required academic classes and fieldwork prior to beginning the community experiential portion of the Doctoral Experiential Capstone;*

*Assuming a leadership role for the Doctoral Experiential Capstone, demonstrating respectful interaction and communication with fellow students, community partners, faculty and community mentors and other individuals who are part of the Doctoral Experiential Capstone;*

*Developing and maintaining a structure for working with your team to conduct and complete your Doctoral Experiential Capstone. This should include clearly delineated responsibilities and timelines, both individual and group;*

*Demonstrating a professional approach to the Doctoral Experiential Capstone, including effective time management, observing deadlines, initiating, reading, and responding to communications from the Doctoral Experiential team and other members of the OTD Program and WNE, and taking responsibility for your own skills and career development.*

*Actively participating in all aspects of the Doctoral Experiential, including:*

- *Developing a proposal and work plan;*
- *Negotiating a community partnership specific to your individual project;*
- *Finding and using appropriate resources;*
- *Completing all necessary forms and assurances;*
- *Arranging for transportation, housing, and other supports as needed to conduct the Doctoral Experiential Capstone;*
- *Completing 448 hours (14 weeks full-time) of doctoral experience, at least 80% of which (359 hours) must be completed at the doctoral experience site. Absences must be made up to ensure 448 hours of doctoral experience;*
- *Arranging and maintaining communication systems for regular information and consultation with your faculty and community mentor(s);*
- *Obtaining Institutional Review Board (IRB) review and approval as needed;*
- *Conducting a scholarly project, including collecting, managing, and analyzing data as proposed;*
- *Preparing and presenting a final reflective portfolio that reports the project*

*outcomes/findings*

- *Complying with all laws, policies, and procedures of the Doctoral Experiential Capstone site, the Doctor of Occupational Therapy Program, Western New England University, state licensure boards, and the American Occupational Therapy Association.*

*Demonstrating the standards of professional behavior outlined in this WNE OTD student manual, including HIPAA/FERPA, OSHA, patient rights and the AOTA Code of Ethics; and*

*Evaluating the Doctoral Experiential Capstone mentors and site to help continue to improve educational outcomes.*

## DOCTORAL EXPERIENTIAL CAPSTONE SITE MENTOR (SM)

The Doctoral Experiential Capstone Site Mentor is the liaison and coordinator representing the Doctoral Experiential Capstone site. Their expertise not only in the work of the experiential site organization but also in the topic area of the community experiential and scholarly projects has been documented and evaluated. The Doctoral Experiential Site Mentor is selected during the OTD 654 Mentorship in the Spring of the second year of the OTD educational program. The Doctoral Experiential Capstone Site Mentor responsibilities are to:

*Agree to work with Western New England University OTD program, including the identified faculty mentor and OTD student(s) for the duration of the Doctoral Experiential Capstone, including providing site orientation and delineating mentorship and student responsibility at their community/agency site location(s);*

*Collaborate with the faculty mentor to guide the student(s) through the needs assessment component of the project proposal, to oversee its implementation, and to collaborate in managing any problems which may arise;*

*Provide guidance on the logistics of completing the Doctoral Experiential Capstone at the site, including scheduling for the student, on-site support and supervision, and arranging access to necessary resources;*

*Collaborate with the faculty mentor to evaluate the student's on-site performance and progress at midterm (@ 7 weeks) and at the end of the Doctoral Experiential Capstone using the Doctoral Experiential Capstone Learning Objective & Evaluation Plan (Appendix G) and the final project report (portfolio) and presentation;*

*Actively participate in regular communication with the other OTD students in your group and your faculty mentor in person, virtually (Skype, Adobe Connect, etc.), by email or other means, including giving both verbal and written feedback on implementation and documentation;*

*Develop and maintain a system for documenting students' experiential hours on-site and the tasks and activities accomplished during those hours (as identified in the workplan); and*

*Provide a written evaluation (in a format provided by the WNE OTD program) of each student's work, including on and off-site activities for the Doctoral Experiential Capstone, at midterm and at the end of the experiential.*

## MENTORING

Each OTD student's Doctoral Capstone, or DEx, is mentored by a faculty member and a community partner, both of whom have expertise in focus for their DEx Capstone. The community partner site mentor may have expertise and training in a field other than OT. This might include nurses, pharmacists, doctors, educators, educational and health administrators, community advocates, physical or speech therapists, social workers, psychologists, etc. The DEx Capstone is structured using a collaborative mentorship approach. Mentorship is a very specific approach to project oversight and student development – one that focuses on the goals and objectives set by the student. The mentor is responsible for listening, providing guidance and feedback, encouraging reflection, and suggesting resources, including access to professional networks.

Mentoring is different in important ways than supervision, which is more task-oriented and is usually hierarchical, than coaching, which is often skill-focused, or training, which has specific objectives. Within a mentorship relationship, it is safe to try out new ideas and set new goals. Mentorship is a relationship through which both parties grow and learn.

It is possible to learn how to become a mentor and, if you already have experience in this role, it is possible to expand and improve your skills. There is much written about mentorship and there are formal and informal training programs. Mentoring, being mentored, and reflecting on those experiences are also important ways to learn.

Recent presentations given by Kaldenberg, Rainville, and Barnes (2019, 2020) identified key aspects of mentoring as relating to the Doctoral Capstone. They report that mentoring is:

- A planned, generative, developmental, reciprocal relationship based on trust
- An interdependent, mutual endeavor (Barker, 2006)
- A process of growth/learning for mentee & mentor (Ragins, 2005; 2012) An experience that involves instrumental & emotional support
- Technical guidance interwoven with affirming relationship to create a “working alliance” (Eby, et al., 2012 p. 463)
- A source of feedback, motivation & empowerment for achieving tasks & goals
- A mechanism to facilitate work within a plan/timeline (Rice, Suh, Yang, Choe, & Davis, 2016)

According to Waters, et al. (2003), the qualities of a successful mentor are:

Mentors  
Confidentiality  
Open & Honest  
Active Listener  
Shares Information  
Motivator

Mentees  
Confidentiality  
Open & Honest  
Interested & Enthusiastic  
Shares Information

Multiple sources (Eby et al, 2012; Rice et al, 2016; Ragins, 2012; Xu & Payne, 2014) suggest that mentoring relationships:

Need to be defined to help set realistic expectations, specifically:

- Identifying availability (time, types/methods of communication)
- Being clear about what each person does, what the relationship provides, how the relationship functions
- Discussing expected behaviors and outcomes

They are of a dynamic quality:

- Touching upon values/beliefs, worldviews, personal lives; authentic, ideal, and “best selves”
- Needing to have plans for how to address conflicts or unmet expectations when they occur

It is possible and advisable to evaluate the mentorship relationship itself as well as its outcomes. The following is a set of well-researched tools to accomplish this:

The Mentoring Competency Assessment (MCA) developed at the University of Wisconsin

- [https://uwmadison.co1.qualtrics.com/jfe/form/SV\\_cZ5jT2DdKYxE66V?Q\\_JFE=qdg](https://uwmadison.co1.qualtrics.com/jfe/form/SV_cZ5jT2DdKYxE66V?Q_JFE=qdg)
- [https://uwmadison.co1.qualtrics.com/jfe/form/SV\\_5jMT4fhemifK01n?Q\\_JFE=qdg](https://uwmadison.co1.qualtrics.com/jfe/form/SV_5jMT4fhemifK01n?Q_JFE=qdg)

Additional mentoring references and resources can be found in Appendix H

Accreditation Council for Occupational Therapy Education (2023). 2023 Accreditation Council for Occupational Therapy Education (ACOTE) standards and interpretive guide. Retrieved from: <https://acoteonline.org/download/5856/?tmstv=1706886053>

Kaldenberg, J.M., Rainville, E.B., Barnes, M.A. (2019) Doctoral Capstone Experience: Cultivating Creative Learning Opportunities. Massachusetts Association for Occupational Therapists (MAOT) Annual Conference

Kaldenberg, J.M., Rainville, E.B., Barnes, M.A. (2020) Doctoral Capstone Experience: Cultivating Creative Learning Opportunities Together. Massachusetts Association for Occupational Therapists (MAOT) Annual Conference

Kaldenberg, J.M., Rainville, E.B., Barnes, M.A. (2020) The Mentoring Relationship: Effective Mentorship Strategies for the Doctoral Experience Mentors. American Occupational Therapy Association (AOTA) Conference

## DOCTORAL EXPERIENTIAL CAPSTONE MENTORSHIP POLICY

Students are assigned a Doctoral Experiential (DEx) Capstone Mentor, and mentorship begins during the summer of Year 1 through a structured faculty-student matching process. The DEx Capstone Mentor relationship is maintained from Year 1 through graduation. The academic advisor remains assigned throughout the program.

### **Purpose**

The DEx Capstone Mentorship supports doctoral experiential project development, scholarly growth, professional identity formation, and sustained well-being throughout the doctoral experience.

The mentorship process:

- Guides development and implementation of the doctoral experiential project.
- Supports achievement of capstone competencies.
- Promotes integration of scholarship, leadership, and professional values.

### **DEx Capstone Mentor Responsibilities**

DEx Capstone Mentors will:

- Provide guidance related to capstone planning, implementation, and evaluation.
- Monitor progress toward capstone milestones.
- Support professional growth and reflective development.
- Discuss workload management and strategies to promote sustained well-being during the capstone process.

### **Student Responsibilities**

Students are responsible for:

- Actively engaging in the mutually beneficial capstone mentorship process.
- Scheduling and attending mentorship meetings.
- Meeting established capstone benchmarks and timelines.
- Communicating challenges that may impact project completion or well-being.

### **Documentation**

Capstone mentorship meetings and project milestones are documented according to Doctoral Experiential Capstone program requirements. Communication between the DEx Capstone Mentor and Doctoral Capstone Coordinator may occur as needed to support academic progression and student well-being, while maintaining appropriate confidentiality standards.

## FORMAT, DATES, AND LOCATION OF THE DOCTORAL EXPERIENTIAL CAPSTONE

The University will determine the dates for the Doctoral Experiential Capstone. The location will be approved by the University and allow for ongoing communication with the Site and Faculty Mentors, and the Doctoral Capstone Coordinator, before, during and/or after the Doctoral Experiential. It is important for the WNE OTD program to have a viable presence at the Doctoral Experiential Capstone Sites to promote ongoing collaborations and sustainable future site options.

## THE FINAL PORTFOLIO AND PRESENTATION

Successful accomplishment of the DEx Capstone goals and objectives is determined by a formal review of each student's e-portfolio, project presentation and professional poster. The DEx Capstone e-portfolio is a collection of documents and artifacts that reflect the student's DEx Capstone plans, activities, and outcomes. Each DEx Capstone student is responsible for the development and presentation of their own e-portfolio, with support and guidance from their mentors. Portfolio assessment puts students in charge of their own learning. It is an authentic form of assessment that attends to both the professional and the personal meanings of the learning experience. It offers multiple opportunities and methods to demonstrate establishment and achievement of goals and objectives and to showcase meaningful outcomes.

The WNE OTD DEx Capstone e-portfolio includes multiple sources of learning evidence, such as meeting and brainstorming session notes, formal and informal communications, rough drafts, observation guides, resources, readings, videos, and professional quality reports. Higher-order cognition is facilitated through ongoing and final review of the process and products and through reflective discussion and writing.

Portfolios reflect the developmental aspects of learning, because both the learning products and the learning process are available for reflection and review. Individuality of expression and creativity are respected in portfolio assessment. The visibility of and attention to the e-portfolio by others is motivating, because most students want to show their work with pride. Students' thinking and efforts are validated when reviewers comment on and commend their work. Portfolio assessment supports professionalism and life-long learning by shifting from traditional evaluative systems to participation in collegial dialogue.

Specific instructions for completing the WNE OTD DEx Capstone e-portfolio and final presentation can be found in Appendix J. Students receive additional instructions over the course of Doctoral Experiential Capstone planning and implementation process. The portfolio will be presented for review, approval, and grading following completion of the Doctoral Experiential Capstone.

Students are also expected to present a professional conference-style poster that reflects an important aspect of their DEx Capstone to a public audience and WNE faculty, staff, and students.

## SCHOLARSHIP, COMMUNICATION, AND AUTHORSHIP

The AOTA Practice Framework (2020) defines scholarship as “A systematic

investigation...designed to develop or to contribute to generalizable knowledge” (Public Welfare: Protection of Human Subjects, 2009). Scholarship is made public, subject to review, and part of the discipline or professional knowledge base (Glassick et al., 1997). It allows others to build on it and further advance the field (AOTA, 2009).

In keeping with this perspective, the WNE OTD program has adopted Boyer’s (1996, 1990) model of scholarship as a guide. As students and mentors plan and execute their DEX Capstone projects, they should consider which type of scholarship, as described by Boyer, best fits the needs of the population and setting. Boyer’s scholarship types are the Scholarship of Discovery, the Scholarship of Engagement, the Scholarship of Integration, the Scholarship of Application, and the Scholarship of Teaching and Learning. A table with explanations and examples of each type of scholarship can be found in Appendix K. Here is a link to Boyer’s original report. <https://depts.washington.edu/g630/Spring/Boyer.pdf>

When Human Subjects are involved in a scholarly project, especially if the findings of that project will be published or presented, it is imperative that students and mentors follow the WNE Institutional Review Board procedures.

## COMMUNICATION

OTD students are expected to write and speak professionally and respectfully. This means that communications are clear, coherent, organized, and grammatically correct. Students should follow the American Psychological Association (APA) Style Guide for publication-quality work such as the final report of the DEX Capstone. As discussed in the section on mentorship, the management style of the DEX Capstone is collegial, so students are expected to solicit and integrate peer and mentor feedback in their writing and speaking. It is typical for students to revise their writing, often many times. This practice supports the development of proficient writing skills and improves the quality of the final product. Professional guidelines are available as another resource for creating publications and presentations that are of high quality. Publication and presentation of work by students and/or employees of WNE are a source of pride for all involved. It is possible that sections of DEX Capstone e-portfolios and/or poster presentations may be published on the WNE website or in our library. Students may also choose to present or publish the work they have done for the DEX Capstone outside of the University.

## AUTHORSHIP

When OTD students submit their DEX Capstone work for publication and/or presentation, it is expected that contributions and authorship will be appropriately credited. Based on recommendations by Oberlander & Spencer (2006) when planning for and determining authorship, WNE OTD DEX Capstone groups should:

- 1.) Refer to authorship guidelines from professional organizations and journals
- 2.) Explore all DEx Capstone group members' professional development beliefs and aspirations
- 3.) Discuss authorship early on with all members of the DEx team
- 4.) Clarify and document everyone's roles
- 5.) Base authorship and order of authorship on relative contributions
- 6.) Determine a procedure for resolving concerns or conflicts regarding authorship; and
- 7.) Use acknowledgments appropriately

The International Committee of Medical Journal Editors (ICMJE) has published a widely used guideline for authorship. They recommend that authors meet all the following four (4) criteria:

- 1) Substantial contributions to the conception or design of the work; or the acquisition, analysis, or interpretation of data for the work; and
- 2) Drafting the work or revising it critically for important intellectual content; and
- 3) Final approval of the version to be published; and
- 4) Agreement to be accountable for all aspects of the work in ensuring that questions related to the accuracy or integrity of any part of the work are appropriately investigated and resolved. (ICMJE,2021)

ICMJE (2021). Defining The Role of Authors and Contributor. International Committee of Medical Journal Editors <http://www.icmje.org/recommendations/browse/roles-and-responsibilities/defining-the-role-of-authors-and-contributors.html>

Oberlander, Sarah & Spencer, Robert. (2006). Graduate Students and the Culture of Authorship. Resources.16.10.1207/s15327019eb1603\_3.  
[https://www.researchgate.net/publication/40010892\\_Graduate\\_Students\\_and\\_the\\_Culture\\_of\\_Authorship](https://www.researchgate.net/publication/40010892_Graduate_Students_and_the_Culture_of_Authorship) [accessed Jan 04 2021]

## DOCTORAL EXPERIENTIAL CAPSTONE GRADING

All courses in the DEx Capstone sequence are graded on a Pass/Fail Basis. Students must pass the independent, mentored Doctoral Experiential Capstone 4: Implementation/Capstone and Mentorship courses (OTD 781/784) to meet graduation requirements. If a student is unable to successfully complete the capstone project/experiential within the 14-week (448-hour) time frame, the faculty mentor will communicate with the site to determine the feasibility of extending the timeframe for course completion. If the site at which the project is being implemented agrees to an extension, the student will meet with the faculty/site mentors to establish a revised plan with timeline for completing the course objectives. The program requires that the student successfully

complete the course according to the revised timeline. To be eligible for graduation, the revised timeline will not exceed 18 months following the completion of the didactic courses. Students who do not complete the Doctoral Experiential Capstone project as proposed and approved, with or without a time extension, will receive a failing grade for the course.

## DOCTORAL EXPERIENTIAL CAPSTONE REQUIREMENTS

The following requirements are standard for all types of WNE OTD experiential learning that include Level I and Level II Fieldwork Experience and the Doctoral Experiential Capstone.

- Basic Life Support for Healthcare Professionals CPR Certification – renewal required every two years;
- CastleBranch Background check – renewal required every two years;
- Blood Borne Pathogen / OSHA Certification – renewal required every year;
- Health Information for Health Insurance Portability and Accountability Act (HIPAA) certification – no renewal required;
- All immunizations and vaccinations which are conditional to being admitted to the OTD program.

In addition to standard OTD program requirements, additional site-specific requirements may include but are not limited to fingerprinting, site-run background checks, and drug testing. Students are responsible for ensuring that these remain current and to keep their individual CORE Experiential Learning Management Software (ELMS) file up to date. Failure to comply with site-specific requirements by the site deadline may result in rescheduling or cancellation of the DEx.

## DEX CAPSTONE GENERAL TIMELINE

### Spring Year 1

- Assigned to DEx Capstone Mentorship Groups.

### Summer Year 1

- Investigate populations, communities, and organizations to complete a SWOT Analysis (in OTD 541, 544);
- Initiate Draft of Literature Review and Preliminary Needs Assessment (in OTD 541, 544).

### Fall Year 2

- Carry out and report on OTD 635 Research Project;
- Explore and determine Site and Site mentor (in OTD 631, 634);
- Meet with potential Site Mentor to develop DEx Capstone Proposal (in OTD 631, 634);
- Complete draft of DEx Proposal and Draft of Literature Review (in OTD 631, 634).

### Spring Year 2

- Initiate DEx Capstone MoU, DEx Capstone Mentorship Agreement, Site Mentor Qualification and Learning Objectives and Evaluation Plan (in OTD 651, 654);
- Refine DEx Capstone Proposal and Review of Literature as needed (in OTD 651, 654);
- Make Final Arrangements for DEx Capstone (in OTD 651, 654).

### Summer Year 2, Fall Year 3

- Level II Fieldwork
- DEx-tination Series and On-line DEx Capstone update meetings.

### Spring Year 3

- DEx Capstone Implementation/Dissemination!!!!

## DEX CAPSTONE PREPARATION, EXPECTATIONS AND SCHEDULE

The purpose of the Western New England University Doctoral Capstone is for students to apply the knowledge and skills they have gained during their academic courses and Level I and II fieldwork experiences in ways that challenge and perhaps transform the delivery of health, education, and social services.

Through designing and implementing a community experiential and a scholarly project that specifically responds to the needs of a population and setting, students experience the roles of reflective practitioner, transformative leader, and innovative designer. The Doctoral Experiential Capstone (DEx) is a complex interrelated field experience and a scholarly project that is coordinated by a student, university, and community team. It is a custom designed in-depth experience and related project in one or more of the following areas: leadership, program and policy development, advocacy, or education.

<b>Spring 1 (Semester 2)</b>			
<b>Time frame</b>	<b>Student Assignment/Tasks</b>	<b>Academic Mentor Responsibility</b>	<b>Site Mentor Responsibility</b>
March/April	Review information about OTD faculty mentors' backgrounds and DEx Capstone expertise and interests  Complete and submit the OTD program DEx preference form that indicates your top three (3) choices for your faculty mentor and/or project	Provide information about your background, expertise, and DEx Capstone interests.  Participate in review of the DEx capstone preference Forms	N/A

April/May	Once assigned to a DEX Capstone faculty mentor and group, participate in initial DEX Capstone orientation and planning meeting(s)	Coordinate DEX Capstone group meetings	
<b>Summer I (Semester 3)</b>			
<b>Time Frame</b>	<b>Student Assignment/Tasks</b>	<b>Academic Mentor Responsibility</b>	<b>Site Mentor Responsibility</b>
May/June/July	<p>Meet with DEX Capstone Group</p> <p>Review and discuss DEX policies and procedures</p> <p>Explore possible DEX Partnerships and projects</p> <p>Review DEX proposal and other forms</p> <p>Develop a Google drive where your group will post DEX resources, assignments, etc.</p> <p>Post relevant articles, article annotations, or reviews and resources related to your DEX Capstone</p> <p>Become familiar with the resources in the DEX Capstone Manual and in the DEX Kodiak Classroom for your cohort</p> <p>Begin review of related literature</p>	<p>Coordinate meetings with DEX group</p> <p>Review and discuss DEX policies and procedures</p> <p>Explore possible DEX partnerships and projects</p> <p>Help students develop realistic ideas</p> <p>Help student(s) identify a population(s) and setting(s) they would like to explore</p> <p>Begin review of possible community partners</p> <p>Begin review of related literature</p> <p>Coordinate with OTD academic courses and assist students in understanding the relevance of each course to their DEX capstone</p>	N/A

Deliverables	<p>Complete Needs Assessment, Leadership, Population Health, and Research courses.</p> <p>Complete the Needs Assessment; Population, Community and Agency Profiles</p>		
<b>Fall II (Semester 4)</b>			
<b>Time Frame</b>	<b>Student Assignment/Tasks</b>	<b>Academic Mentor Responsibility</b>	<b>Site Mentor Responsibility</b>
November/December	<p>Coordinate meeting(s) with faculty &amp; site mentor to discuss proposed project, student goals and objectives, plans for DEx Capstone</p> <p>Work with your faculty mentor to identify a possible DEx Capstone site and begin communication with them to obtain the DEx and to obtain verbal agreement to serve as a DEx community partner. Identify site mentor(s) from the organization</p> <p>Once a potential DEx capstone site has been identified, provide information to a DEx Capstone Coordinator who will initiate negotiation of a DEx Capstone Memorandum of Understanding (MoU)</p> <p>Submit an initial draft of the Short DEx Capstone Proposal</p>	<p>Meet with Site Mentor and student to discuss proposed project, student goals and objectives, plans for DEx Capstone</p> <p>Work with student(s) to identify a possible DEx site and begin communication with them to explain the DEx capstone and obtain verbal agreement (confirm by email) to serve as a DEx Capstone community partner. Identify a site mentor(s) from the organizations</p> <p>Once a potential DEx capstone site has been identified, provide information to the DEx Capstone Coordinator who will initiate negotiation of a DEx capstone</p>	<p>Confirm availability of the DEx capstone site and site mentor for the DEx capstone project(s)</p> <p>Meet with student and faculty mentor to discuss proposed DEx capstone, student goals and objectives, and specific plans.</p> <p>Work with the faculty mentor and student(s) to review the potential DEx and provide a verbal agreement (confirmed by email) to serve as a DEx Capstone community partner. Identify a site mentor(s) from the organization.</p> <p>Once you have agreed to be a DEx capstone site, work with the DEx capstone</p>

		<p>Memorandum of Understanding (MoU)</p> <p>Review and provide feedback on the initial draft of the DEx Capstone short proposal submitted by the student</p>	<p>coordinator to negotiate a DEx Memorandum of Understanding (MoU)</p> <p>If appropriate, review and provide feedback on the initial draft of the short DEx Capstone Proposal submitted by the student</p>
Throughout the semester	<p>Communicate with faculty mentor, DEx group members, site mentor (if identified) and DEx Capstone coordinator, as needed</p> <p>Complete Needs Assessment, Leadership, Population Health, and Research courses.</p>	<p>Review DEx capstone Kodiak Classroom and Google or other shared drive that is set up and maintained by your group</p> <p>Participate in DEx faculty meetings and both small group and full cohort DEx trainings</p> <p>Communicate with student(s), DEx Capstone Coordinator, site mentor(s) as needed</p> <p>Schedule and hold meetings (in person or virtual) with student(s), DEx capstone coordinator, site mentor(s)</p> <p>Communicate with student(s) to provide feedback about the resources posted on the shared drive</p>	<p>Be available to communicate with student(s), DEx Capstone Coordinator, site mentor(s) as appropriate</p>

Deliverables	Complete drafts of Literature Review and DEx Project Proposal	Coordinate with OTD academic courses and assist students in understanding the relevance of each course to their DEx capstone	Student may wish to review their needs assessment, community profile, with you. Provide feedback.
<b>Spring II (Semester 5)</b>			
<b>Time Frame</b>	<b>Student Assignment/Tasks</b>	<b>Academic Mentor Responsibility</b>	<b>Site Mentor Responsibility</b>
Throughout the Semester	<p>Begin active planning of DEx capstone, including visiting site and meeting with site mentor, as possible</p> <p>Begin/Continue active planning of DEx capstone, including visiting site and meeting with site mentor, as possible.</p> <p>Continue and finalize review of literature.</p> <p>Complete OTD 651, including beginning your DEx e-portfolio.</p> <p>Update and Submit DEx capstone proposal to reflect updated literature review (theoretical/conceptual framework for DEx</p>	<p>Continue regular meetings with DEx Capstone group, individual students, site mentor and DEx Capstone Coordinator.</p> <p>Facilitate continued literature review</p> <p>Review and provide feedback on updated proposal.</p> <p>Review DEx Kodiak Classroom and Google or other shared drive set up and maintained by your group.</p> <p>Participate in DEx Capstone faculty</p>	<p>Be available to communicate with student, faculty mentor, and DEx Capstone Coordinator as appropriate</p> <p>Review and provide feedback on updated proposal, as appropriate</p>

	<p>Capstone), the needs assessment and community profile, and plans for the experiential and scholarly DEx capstone projects</p> <p>Provide DEx capstone coordinator (Debra Latour) with updated contact information for the DEx Capstone site and site mentors</p> <p>Determine the format of and expectation for the final Literature Review and Needs Assessment and the Final Report</p>	<p>meetings and both small group and full cohort DEx capstone trainings</p> <p>Communicate with student(s), DEx capstone coordinator, site mentor(s) as needed</p> <p>Communicate with student(s) to provide feedback about resources they have posted on the shared drive.</p>	
Deliverables	<p>Revise and update literature review, needs assessment, and DEx capstone proposal</p> <p>Work with Faculty and Site Mentor to begin the Doctoral Experiential Capstone Mentorship Agreement and obtain site mentors credentials for approval by DEx Capstone Coordinator; confirm plans for the DEx capstone, including dates and times, identify learning objectives and activities and complete the DEX Capstone Mentorship agreement and Site Mentor Qualifications</p> <p>Review Doctoral Experiential Capstone</p>	<p>Review and provide feedback on literature review, needs assessment, and DEx capstone proposal and review DEx capstone proposal</p> <p>Begin Doctoral Experiential Capstone Mentorship Agreement and obtain site mentors credentials for approval by DEx Capstone Coordinator</p> <p>Review Doctoral Experiential</p>	<p>Review and provide feedback on the updated literature review, needs assessment, and DEx capstone proposal</p> <p>Work with Faculty Mentor and student to begin the Doctoral Experiential Capstone Mentorship Agreement and obtain site mentors credentials for approval by DEx Capstone Coordinator.</p>

	Learning and Evaluation Plan	Learning and Evaluation Plan	
<b>Summer II (Semester 6)</b>			
<b>Time Frame</b>	<b>Student Assignment/Tasks</b>	<b>Academic Mentor Responsibility</b>	<b>Site Mentor Responsibility</b>
June-August (12 weeks)	Level II Fieldwork		
During Level II FWE	DEX-tination Series;  Online DEX capstone preparation meetings run by DEX Capstone coordinator and or DEX Group meetings run by DEX Mentor(s)	Attend, participate in, and as needed, coordinate these meetings. Keep students, DEX Capstone Coordinator, and Site Mentor(s) informed. Raise issues and provide information as needed	Attend and participate in relevant meetings. raise issues and provide information as needed
<b>Fall III (Semester 7)</b>			
<b>Time Frame</b>	<b>Student Assignment/Tasks</b>	<b>Academic Mentor Responsibility</b>	<b>Site Mentor Responsibility</b>
September-December (12 weeks)	Level II Fieldwork		
During Level II FWE	DEX-tination Series;  Online DEX capstone preparation meetings run by DEX Capstone coordinator and or DEX Group meetings run by DEX Mentor(s)	Attend, participate in, and as needed, coordinate these meetings. Keep students, DEX Capstone Coordinator, and Site Mentor(s) informed. Raise issues and provide information as needed	Attend and participate in relevant meetings. raise issues and provide information as needed
<b>Spring III (Semester 8)</b>			
<b>Time Frame</b>	<b>Student Assignment/Tasks</b>	<b>Academic Mentor Responsibility</b>	<b>Site Mentor Responsibility</b>

<p>Throughout the DEx planning and implementation, students, faculty, and site mentors and the DEx Capstone Coordinator will review and update goals and objectives, monitor the DEx Capstone projects and activities and communicate regularly. Communications will be documented.</p>			
<p>Week 1: orientation to site and expectations</p>	<p>Develop a communications schedule for meetings, reporting/reflection, information management, and problem solving</p> <p>Establish regular mentorship meetings</p> <p>Maintain DEX time schedules and logs and e-portfolio (on-going)</p> <p>Update DEX capstone learning and evaluation plan</p>	<p>Collaborate with and provide guidance to site mentor(s) and student(s) as needed</p> <p>Delineate Faculty and Site mentor responsibilities</p> <p>Establish regular mentorship meeting times</p> <p>Oversee completion and submission of DEX time schedules and logs</p> <p>Update DEX Capstone Learning and Evaluation Plan</p>	<p>Provide orientation</p> <p>Review and update DEX Capstone objectives and planned activities</p> <p>Establish regular mentorship meeting times</p> <p>Oversee completion and submission of DEX Capstone time schedule and logs</p> <p>Update DEX learning and evaluation plan</p>
<p>Week 2</p>	<p>Complete needs assessment for DEX Capstone site and develop/update DEX Capstone plan to respond to identified needs</p> <p>Using site specific resources as well as the literature and your mentors, explore the key issues that relate to your DEX</p>	<p>Be available as needed to provide support to the student and/or site mentor</p> <p>Participate in regularly scheduled DEX Capstone communications</p> <p>Monitor progress on DEX objectives</p>	<p>Provide access for the DEX Capstone student to meet with community partner staff, clients, administrators, etc.</p> <p>Orient student to the Dex community partner policies and practices</p>

	Maintain and submit DEx Capstone time schedules and logs and e-portfolio (ongoing)		
Week 3 throughout Week 13	<p>Maintain and submit DEx Capstone time schedules and logs and e-portfolio (ongoing)</p> <p>Document all DEx related communication (i.e. emails, minutes of meetings, etc.)</p> <p>Implement proposed DEx Capstone updating and modifying as needed and as agreed upon by student(s) and mentors. Inform DEx capstone coordinator of major changes</p> <p>Complete midterm DEx Capstone learning and evaluation with faculty and site mentor (Week 7)</p>	<p>Be available as needed to provide support to the student and/or site mentor</p> <p>Participate in regularly scheduled DEx communications</p> <p>Monitor progress on DEx objectives</p> <p>Oversee implementation of proposed DEx, updating and modifying as needed and as agreed upon by the student(s) and mentor(s) inform DEx Capstone Coordinator of major changes</p> <p>Complete midterm DEx Capstone Learning and Evaluation with faculty and site mentor (week 7)</p> <p>Regularly review and provide feedback on e-portfolio</p>	<p>Provide mentorship as detailed in agreement</p> <p>Provide support, direction, and feedback on progress toward meeting DEx Capstone objectives</p> <p>Participate in regularly scheduled DEx Capstone communications</p> <p>Monitor progress on DEx objectives</p> <p>Oversee implementation of proposed DEx, updating and modifying as needed and agreed upon by the student and mentors. Inform DEx coordinator of major changes.</p> <p>Complete midterm DEx Capstone learning and evaluation with faculty and site mentor (Week 7)</p> <p>Regularly review and provide feedback on e-portfolio</p>

Week 14	Complete final DEx Capstone learning and evaluation with faculty and	Be available as needed to provide support to the	Provide feedback for final DEx Learning and
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	<p>site mentor (week 13 or 14)</p> <p>Complete DEx Capstone time schedules and logs</p> <p>Prepare for e-portfolio presentation and review poster presentation</p>	<p>student and/or site mentor</p> <p>Participate in regularly scheduled DEx capstone communications</p> <p>Provide feedback for final DEx Learning and Evaluation with faculty site mentor (Week 13 or 14)</p> <p>Review DEx time schedules and log</p> <p>Review and provide feedback as student prepares for e-portfolio presentation and review and poster presentations</p> <p>Assure that final presentations meet professional standards</p>	<p>Evaluation (with faculty and site mentor (Week 13 or 14)</p> <p>Review and provide feedback as student prepares for e-portfolio presentation and review and poster presentation)</p> <p>Complete DEx time schedules and logs.</p>
Week 15	<p>E-portfolio review by mentors and external reviewers</p> <p>Poster presentation – public prerecorded) presentation with opportunity to comment and discussion</p>	<p>Review and provide feedback along the way and final feedback by week 14 to allow student time to integrate feedback into final e-portfolio and presentation</p>	<p>Review and provide feedback along the way and final feedback by week 14 to allow student time to integrate feedback into final e-portfolio and presentation.</p>

## ACKNOWLEDGMENTS

This Doctoral Experiential Capstone Manual draws heavily upon the expertise, resources, and publications of the following entry-level occupational therapy doctoral programs; Sargent College: Boston University, Duquesne University, Massachusetts General Hospital Institute for Health Professions, The Ohio State University, Pacific University, and Tufts University Boston School of Occupational Therapy. Professional mentorship is a key component for growth and development within one's field and scope of practice. As such, the mentorship provided via the AOTA Capstone Coordinator Mentorship Program has been helpful in the creation and revision of this manual.

## REFERENCES

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# APPENDICES

## Appendix A

### DOCTORAL EXPERIENTIAL CAPSTONE PROPOSAL/PLAN SHORT FORM

**Student Name:**

**Date of Proposal Submission:**

**Faculty Mentor(s):**

**Site:**

**Site Mentor(s):**

**Title:**

**Executive Summary:** *A 2 -3 sentence description of the proposed project. Please make sure to include some information about the population and setting that will be the focus of your project. Include your statement of purpose.*

**Introduction/Background:** *Include a very brief (2 -3 paragraphs) summary of how this DEx Capstone project has evolved. Include some information from your review of the literature and your preliminary needs assessment. You will use your more extensive literature review and needs assessment in your final project.*

**Doctoral Experiential Project Overview:** *Provide a brief (3-4 paragraphs) summary and overview of your DEx Capstone project. Include a paragraph about the community experiential, as you currently envision it, and a paragraph about the intended scholarly project. Specify and describe if you have negotiated these with your faculty and/or site mentor, or if you are simply suggesting some possibilities.*

**Learning Objectives:** *List three (3) or more learning objectives that are specific to your project. These may be achieved through either the experiential or the scholarly components or through both. These objectives are very important. They will be listed on the DEx Capstone Mentorship Agreement and the DEx Capstone Learning Plan and Evaluation form and they will be used to measure the success of your project.*

**Doctoral Experiential Schedule and Workplan:** *You may use the attached form, or you may create your own. This workplan should be very specific and will be further developed over the next few months as you plan and prepare for your Doctoral Experiential Capstone project.*

**Anticipated Needs:** *Supply a list of materials, equipment, staffing, space, and other resources that are needed to implement your proposed project.*

**Preliminary Budget:** *Include a list or table detailing the anticipated expenditure (approximate costs) and potential funding sources.*

**Doctoral Experiential Evaluation Plan:** *Include a very brief (2 -3 paragraphs) summary of how this DEx Capstone project will be evaluated, the model or theory that you will use, and why.*

**Comments/Additional Information**

**References**

**WNE OTD DEx CAPSTONE WORKPLAN**

Activity/Task	Outcome	Timeline	Person(s) Responsible	Resources Needed/Comments

## Appendix B

### WNE OTD DEX CAPSTONE COURSE SERIES & DESCRIPTIONS

These are the course content and learning competencies of the OTD courses most closely aligned with the Doctoral Experiential Capstone and possible Doctoral Experiential Capstone projects.

#### YEAR ONE: SPRING

##### **OTD 525 (3 cr)**

##### **Research Process/Evidence-Based Practice 1**

This course is the first of two courses on research process and evidence-based practice (EBP). The course will explore the principles of human subject research, the necessity for research in knowledge development, and breadth of research methodologies. Students will learn to transform clinical problems, departmental issues, legislative concerns or advocacy opportunities into researchable questions. The course has three principal foci: 1) assessing/establishing evidence bases for practice with literature searches, systematic reviews, and meta analyses; 2) understanding the research process for qualitative and quantitative research, retrospective reviews, and single case designs, from defining the research question, performing literature reviews, selecting methodologies, measurements, and samples, to analyzing and writing up research; and 3) securing funding and human subjects' authorization for research.

#### YEAR ONE: SUMMER

##### **OTD 541 (2cr)**

##### **Doctoral Experiential 1: Needs Assessment & Program Development**

This is the first course in the Doctoral Experiential sequence and focuses on the sequence of actions necessary to conduct a comprehensive needs assessment to develop an evidence-based program to address the identified needs. Students will examine theoretical models of community-based practice and health promotion; investigate a community to develop a profile; identify a program, interview program managers and conduct a critical analysis of program strengths, weaknesses, opportunities, and threats; research and identify available grant funding options for program development; and learn strategies for grant writing. Students will work simultaneously with their assigned faculty mentor and the Doctoral Capstone Coordinator to identify and procure a facility/site at which they will ultimately complete the Doctoral Experiential Capstone Component of the OTD program. Students will identify a site mentor, who will work with the student throughout the Doctoral Experiential process. Students will conduct a needs assessment, analyze the information, and disseminate the results through a scholarly report. This course supports the [OTD 544](#): Doctoral Experiential 1: Mentorship Seminar.

##### **OTD 544 (1cr)**

##### **Doctoral Experiential 1: Mentorship Seminar**

This course is taken in conjunction with [OTD 541](#): Doctoral Experiential 1: Needs Assessment & Program Development and provides the student with faculty mentorship for initiating a needs assessment relevant to a particular topic. The course addresses the following: review of the literature; development of a community profile; identification of possible sites; identification of measurement tools to conduct a needs assessment; analysis of the data collected; and writing and disseminating a scholarly report on the results of the preliminary needs assessment. Students will be assigned a faculty mentor who will work with them throughout the Doctoral Experiential sequence of courses.

### **OTD 545 (2cr)**

#### **Population Health & Interprofessional Practice: Children & Youth**

This course is designed to introduce the basic concepts of population health utilized by occupational therapists in fostering the goals of health promotion, cultural humility, improved client-centered care experiences/outcomes, and global health and wellness initiatives. This course will specifically target the developmental, physical, and psychosocial issues that limit health equity and wellness in infants, young children, school-age youth, and adolescent populations and their caregivers. Within this course there is an emphasis on understanding and implementing the life course health development model, focusing on infancy through adolescence. Patient/client groups discussed will include those with congenital and chronic disabilities, acute care medical conditions, intellectual disabilities, neuro-muscular disorders, and others. Students will also be introduced to the core principles of interprofessional practice and collaboration among health care teams is essential to the achievement of these goals. This course is aligned with course content in [OTD 547](#) that addresses occupational performance in the pediatric population across a variety of healthcare settings including acute medical, rehabilitation, early education, home-based care, and school-based and community practice. Students will review the literature on interprofessional practice and will identify best-practice strategies for: forming interprofessional teams in various practice contexts and with differing populations; communicating and collaborating on goal setting; and managing shared responsibility to optimize outcomes.

### **YEAR TWO: FALL**

### **OTD 631 (3cr)**

#### **Doctoral Experiential 2: Proposal Development**

This is the second course in the Doctoral Experiential sequence. During this course, students will report the findings of the needs assessment to the facility/site representative and work with the faculty and site mentors to identify a researchable question, complete a literature review; and author the first two components of a scholarly report. This course emphasizes completion of the Introduction, Problem Statement, Project Rationale, and Literature Review sections. This course is taken concurrently with [OTD 634](#): Doctoral Experiential 2: Mentorship Seminar.

### **OTD 634 (2cr)**

#### **Doctoral Experiential 2: Mentorship Seminar**

This course is taken in conjunction with [OTD 631](#): Doctoral Experiential 2: Proposal Development and provides the student with faculty mentorship for completion of and presentation of the needs assessment findings, development of a doctoral project focus and a proposal plan for implementation; identification of a researchable question; and completion of the Introduction, Problem Statement, Rationale, and Literature Review sections of the doctoral project. Students identify a facility and cultivate a relationship with potential mentor(s) at the identified site, with support and faculty mentorship.

### **OTD 635 (3cr)**

#### **Research Process/Evidence-Based Practice 2**

This course is the second of two courses on research process and evidence-based practice (EBP). In this course, students will move beyond being knowledgeable consumers of research to becoming interprofessional team members who 1) participate in the design of qualitative and quantitative research

methodologies, 2) understand the selection of data analysis tools for qualitative and quantitative research, 3) develop skills in writing about research methodology for both proposals and research papers, 4) become adept at displaying findings from research and demonstrate the ability to summarize and interpret findings. Students will learn this content through the completion of a scholarly study that informs the scholarship component of the Doctoral Experiential Capstone Project (DEx). This knowledge will be ascertained through the completion of a scholarly study that informs the scholarship component of the Doctoral Experiential Capstone Project (DEx).

## **YEAR TWO: SPRING**

### **OTD 645 (2cr)**

#### **Population Health and Interprofessional Practice Adults & Aging**

This course is designed to explore the population health ecosystem, including program initiatives to improve health promotion, cultural humility, access and outcomes, global health and wellness initiatives, and the education and advocacy tools needed to inform, engage with, and empower adult and aging populations. Students will explore how life-changing acute and chronic physical and mental health conditions in adults are negatively impacted by the culture of existing medical practices, and how client-centered care and a culture of wellness can maximize health and performance. Within this course there is an emphasis on understanding and implementing the life course health development model, focusing on adulthood through end of life. Some of the populations studied include Veterans with PTSD, workers with acquired injuries, individuals with alcohol and substance abuse problems, clients with memory impairment including concussion, at-risk groups with access to care challenges, and the well-elderly. Students will utilize the core principles of interprofessionalism to envision collaborative practice teams who work together as a catalyst for transformative change in diverse practice settings. Utilizing content knowledge gained in [OTD 517](#), [OTD 527](#), [OTD 537](#), and [OTD 657](#), students will explore team membership, communication strategies, and techniques for shared decision-making in settings such as: primary care; post-acute in-patient care; outpatient rehabilitation centers; community-based mental health settings; and agencies providing home health.

### **OTD 651 (3cr)**

#### **Doctoral Experiential 2: Pre-Implementation Planning**

This is the third course in the Doctoral Experiential sequence. During this course, students will identify the methodology of the project and collaborate with the site and faculty mentors to establish a plan for implementation. For this component, students will write the Methodology, Population, and Data Collection and Analysis sections of the scholarly report for the proposed program/project. This course is taken concurrently with [OTD 654](#): Doctoral Experiential 3: Mentorship Seminar.

### **OTD 654 (3cr)**

#### **Doctoral Experiential 3: Mentorship**

This course is taken in conjunction with [OTD 651](#): Doctoral Experiential 3: Pre-Implementation Planning and provides the student with faculty mentorship for completing the Methodology, Population, and Data Collection/Data Analysis sections of the scholarly report.

## **YEAR THREE: SPRING**

### **OTD 781 (10cr)**

#### **Doctoral Experiential 4: Implementation/Capstone**

This is the fourth and final course in the Doctoral Experiential sequence. It represents advanced professional skills. It is a 14-week/640-hour experience that focuses on the implementation of the evidence-based,

community-based, interprofessional doctoral project/study on-site at the community agency/facility. During the course, students will complete any necessary updates or edits to the project proposal and complete the final component (Discussion, Implications, Limitations, Conclusions). In addition, students will present their findings to participants, peers, faculty, and community practitioners as appropriate. Working with the faculty and site mentors, the student will prepare the finished report for professional publication/dissemination. This course is taken concurrently with OTD 784, Doctoral Experiential 4: Mentorship.

**OTD 784 (3cr)**

**Doctoral Experiential 4: Mentorship**

This course is taken in conjunction with OTD 781: Doctoral Experiential 4: Implementation/Capstone and provides the student with faculty mentorship for completion of the Doctoral Experiential, including implementation of the doctoral project/study, completion of all sections of the scholarly paper, presentation of the project/study, and preparation for publication and/or dissemination.

## Appendix C

### OCCUPATIONAL THERAPY DOCTORAL EXPERIENTIAL CAPSTONE VERIFICATION OF SITE MENTOR QUALIFICATION

Student Name

Student Contact Information Dates of Doctoral Experiential Capstone

Title of Doctoral Experiential Capstone

WNE Faculty Mentor Name

WNE Faculty Mentor Contact Information

Site Mentor Name:

Site Mentor (work) Contact Information:

Legal Name and contact information for the Site:

Verification of Credentials and Qualifications:

Current Licensure and/or Certification:

List relevant licenses and/or certifications with effective dates, and attach copies

Qualifications

- Please attach a current Curriculum Vitae or Resume
- Relevant Education and/or Training
- Relevant Experience

Please fax, mail, or email this form and supporting documents to:

Debra Latour

Department of Occupational Therapy  
College of Pharmacy and Health Sciences  
1215 Wilbraham Road  
Springfield, MA 01119-2684  
debra.latour@wne.edu  
413-782-1449

## Appendix D

### DOCTORAL EXPERIENTIAL CAPSTONE MEMORANDUM OF UNDERSTANDING

Doctoral Students:

Faculty Mentor:

Doctoral Experiential Capstone:

Site Mentor:

This Agreement is made as of \_\_\_\_\_, by and between the above name doctoral student, Doctoral Experiential Capstone site \_\_\_\_\_ and the Western New England University, College of Pharmacy and Health Sciences, Department of Occupational Therapy, 1215 Wilbraham Road, Springfield, MA 01119.

The University offers a Doctor of Occupational Therapy (OTD) degree program that requires an advanced doctoral experiential project as part of the graduate curriculum. This advanced doctoral experiential project includes both experiential (practicum) and scholarly components. To ensure that its students meet the requirements for the degree of Doctor of Occupational Therapy and occupational therapy licensure in the United States, the University has established the OT Doctoral Experiential Capstone. This agreement pertains only to the OT Doctoral Experiential.

By signing this Memorandum of Understanding, you agree to become a WNE Doctoral Experiential Capstone site and your staff will work with University personnel and students to accomplish the objectives of the Doctoral Experiential Capstone. This will include the development and approval of a Doctoral Experiential Proposal(s) which will outline the specifics of the experiential and scholarly components of each student's Doctoral Experiential Capstone. As a Doctoral Experiential Capstone site, you will provide practice facilities, equipment, services, and personnel deemed appropriate for students to complete their proposed Doctoral Experiential Capstone. Specific individualized objectives will be provided for each student who is assigned to a Doctoral Experiential Capstone at your Site.

The Site is the operator of one or more facilities in which such educational experiences presently exist or may be developed. The University and the Site desire to establish a relationship pursuant to which the University shall identify the Site as an appropriate setting for such training, and select students enrolled in the OTD program for placement with the Site for the purpose of completing a Doctoral Experiential Capstone, upon the terms and conditions hereinafter set forth. The Site is willing to identify specific site mentors with appropriate professional credentials and experience to serve as site mentors and accept OTD students for the purpose of providing the Doctoral Experiential Capstone component of the OTD program.

The parties agree that a Doctoral Experiential Capstone shall be conducted for students (defined as being enrolled full-time at the Department of Occupational Therapy and hereinafter referred to as "Students") at the Site under the following terms and conditions:

#### I. RESPONSIBILITIES OF WESTERN NEW ENGLAND UNIVERSITY DEPARTMENT OF OCCUPATIONAL THERAPY:

- A. The University will assume and maintain full responsibility for the administration of the Department of Occupational Therapy, including program planning, curriculum design and courses,

assignment of the OT Doctoral Experiential Capstone Coordinator and/or assignment of Doctor of Occupational Therapy faculty to facilitate the Doctoral Experiential at the Site.

B. The University will coordinate with the Site in developing the details of the Doctoral Experiential including but not limited to course and project outlines and objectives, dates and number of students on the Doctoral Experiential Capstone. The University will designate the WNE OTD Doctoral Experiential Capstone Coordinator and an assigned University faculty mentor to work with the assigned site mentor(s) to coordinate the Doctoral Experiential at the Site.

C. The University shall provide an orientation and make available ongoing education to the Site and Site Mentors. Site Mentors have expertise consistent with the student's area of interest and may include, but not be limited to, occupational therapists, health care practitioners, education professionals, administrators, and policy experts.

D. The University shall maintain responsibility for curriculum and teaching objectives, grading/assessment system, resources for site mentors, and development of the Doctoral Experiential Capstone Proposal, Final Portfolio, and Presentation. The University will make available to all site mentors the OTD Doctoral Experiential Capstone Manual and the Mentorship Agreement.

E. The University will require students to follow the rules, regulations, policies, and procedures of the Site, those contained in the Department of Occupational Therapy Student Handbook while at the Site, and all Federal and State regulations to which the site must adhere.

F. The Chair/Program Director of the Department of Occupational Therapy will appoint identified site mentors as Adjunct Instructors of Occupational Therapy. All said site mentors will remain employees of the Site at all times.

G. The WNE OTD Doctoral Experiential Capstone Coordinator will assign students to the Site only after all appropriate immunizations, background checks, training, and all other site requirements have been met.

H. The University will ensure that each student participating in the Program is covered by the University's liability insurance during the Program. The limits of the coverage for the student will be \$1,000,000 per occurrence, up to \$3,000,000 in the aggregate for the policy period. The Site shall also secure and maintain at all times during the term of this Agreement, at its sole expense, appropriate general and professional liability insurance coverage in amounts of at least \$1,000,000 per occurrence and \$3,000,000 in the annual aggregate with insurance carriers or self-insurance programs covering itself and its employees. The University shall notify the Site immediately of any cancellation or termination of such insurance. Students are responsible for any additional professional liability insurance that they may wish to purchase on their own.

I. The University will ensure that each student has satisfied the health insurance requirements of the University and the Department of Occupational Therapy.

J. The University will instruct Students in the legal considerations and practices concerning confidentiality and the Health Insurance Portability and Accountability Act of 1996 (HIPAA) requirements of patient information prior to assignment to the Site and as also outlined in the Department of Occupational Therapy Student Handbook.

K. The University will withdraw a Student from the program at the Site if, after consultation with the Site and Faculty Mentors and the WNE OTD Doctoral Experiential Capstone Coordinator

and/or the Chair of the Department of Occupational Therapy, the University determines such action to be warranted.

L. The Department of Occupational Therapy's Doctoral Experiential Coordinator will investigate any questionable Site or Site Mentor activities that are impacting the Student and/or the Department of Occupational Therapy. If necessary, corrective steps will be taken by the University, with the outcome possibly resulting in the termination of this agreement.

M. The Site and Site Mentor shall provide adequate and reasonable supervision and evaluation of Students upon set terms and conditions. The University agrees to indemnify and hold harmless the Site in any and all actions or proceedings resulting from the Site's participating in such evaluations, including without limitation, reasonable attorneys' fees and costs, excluding any acts or omissions that may be criminal, willful, reckless, or grossly negligent.

N. The Department of Occupational Therapy's Doctoral Experiential Capstone Coordinator will supply a copy of a Mentorship Agreement (sample attached) with dates of placement, names and contact information for faculty mentor, site mentor, and student, for each student who is assigned to a Doctoral Experiential Capstone at this site.

## II. RESPONSIBILITIES OF THE SITE

A. The Site will make appropriate facilities, equipment, and supplies available that are conducive to maximizing the learning environment and achieving the documented OTD Doctoral Experiential goals/objectives.

B. The Site will assign a site mentor who is adequately prepared for the role, to provide appropriate guidance and supervision of the Doctoral Experiential Capstone.

C. The Site Mentor will collaborate with an assigned faculty mentor to guide the student(s) through the needs assessment component of the project proposal; provide guidance on the logistics of completing the Doctoral Experiential Capstone at the site; collaborate with the faculty mentor to evaluate the student's on-site performance, prepare the final project report and presentation; actively participate in regular communication with the OTD students and their faculty mentor in person, virtually (Skype, Adobe Connect, etc.), by email, or other means, including giving both verbal and written feedback on implementation and documentation; develop and maintain a system for documenting students' experiential hours on site and the tasks and activities accomplished during those hours (as identified in the objectives); complete a written evaluation (in a format provided by the WNE OTD program) of each student's work, including on and off-site activities of the Doctoral Experiential Capstone.

D. The Site will inform the Students of any specific rules, regulations, policies, and/or procedures of the Site. Students will be accountable for compliance with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) and/or Family Educational Rights and Privacy Act of 1974 (FERPA) as related to patient/client care

E. During the Program, the Site will permit the Student(s) access to all appropriate personnel, facilities, equipment, supplies, services, and patient records as per the Doctoral Experiential Capstone objectives. While doing their Doctoral Experiential Capstone at the Site, students shall have full access to all appropriate references and library privileges as related to their placement and the provision of care.

F. Students, under the supervision of the Site Mentor, shall have opportunities to participate in the learning environment which may include, but not be limited to, Grand Rounds, specialty clinics, office visits, lectures, conferences, in-services, interprofessional team meetings, etc.

G. The Site reserves the right to suspend and/or terminate any Student's participation in the Program because of health status, performance, and/or other considerations that the Site deem detrimental to consumers' well-being or to the achievement of teaching objectives. Except in unusual circumstances, the Site will not exercise such rights until it has made reasonable efforts to consult with the WNE OTD Doctoral Experiential Capstone Coordinator, and/or the Chair of the Department of Occupational Therapy.

H. The Site will permit Department of Occupational Therapy faculty or appropriate designees, with sufficient notice, to visit the Site for routine assessment and/or follow up to inspect the facilities and services available for Doctoral Experiential Capstone completion, student progress, and to inspect and consult with appropriate personnel. Upon advance notice, the University may request the Site Mentor participate in accreditation processes.

I. The Site will make emergency medical care available to Students on the premises through the regular Site procedure for handling emergencies. The cost of such emergency care shall routinely be the responsibility of the Student except in cases of gross negligence on the part of the Site.

J. The Site has the obligation to provide timely and reasonable notice to the university of any specific immunizations or any other site-specific requirements required by site.

### III. MUTUAL RESPONSIBILITIES:

A. The University and Site designee will execute this Doctoral Experiential Capstone Agreement/Memorandum of Understanding. The University is responsible for guiding the Department of Occupational Therapy Chair/Program Director and WNE OTD Doctoral Experiential Capstone Coordinator in the planning and implementation of the Doctoral Experiential Capstone. The Site is responsible for providing a qualified Site Mentor who can supervise, meet Doctoral Experiential Capstone objectives, and document student performance.

B. The WNE OTD Doctoral Experiential Capstone Coordinator, an assigned WNE OTD faculty mentor, and a Site Mentor/designee of the Site will oversee implementation of the Doctoral Experiential Capstone Agreement and will collectively plan for:

1. Student placement and orientation
2. Preparation and periodic review of objectives of the program
3. Community experiential and scholarly project activities, especially those that take place at the site.
4. Quality assurance review by the University via evaluation of the Student, the Site, and Site Mentor.

C. The WNE OTD Doctoral Experiential Capstone Coordinator and/ or Faculty Mentor will meet with the Site Mentor, to develop Doctoral Experiential Capstone goals and objectives, to discuss supervisory strategies, and determine procedures and timelines for evaluating the experience. The University will assist the Site in conducting evaluations of the Doctoral Experiential.

D. Each party hereby agrees to indemnify and hold harmless the other party, except in a case of breach or defiance of this Agreement or gross negligence of the Site, from and against any and all losses, damages, liabilities, and other expenses of every kind and nature, including reasonable attorney's fees, sustained by or incurred by the other party as a result of any debts, actions, causes of action, claims, suits, liabilities, obligations or damages. The right to indemnification sets forth herein shall be in addition to and not in derogation of any other rights contained in this Agreement.

E. The parties will each abide by all infection control protocols as established by the CDC and by other relevant federal, state, and local public health authorities, including but not limited to increased hygiene and sanitation policies, frequent hand washing, the wearing of face masks or shields, and physical distancing guidance when appropriate in a clinical setting

F. Each party will agree that in the performance of this Agreement, there will be no discrimination against any employee, student or person on account of race, color, religion, sex, sexual orientation, gender identity or gender expression, ancestry, age, national origin, disability or any other status protected by the law.

G. Review of this affiliation agreement will be conducted on an ongoing basis and at least every three years. Renewal will be automatic unless one or both parties decide otherwise.

II. If the Department of Occupational Therapy or the Site wants to cancel this Doctoral Experiential Capstone Agreement/Memorandum of Understanding, at least 90 days' written notice of cancellation must be provided to the Doctoral Experiential Capstone Coordinator. Automatic termination of this affiliation Agreement may result if there are any questionable Site or Site Mentor activities that are impacting on the Student and/or the Department of Occupational Therapy.

J. This Agreement is non-transferable. It can only be modified by the parties, in writing.

INSTITUTION/COMPANY:

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

WESTERN NEW ENGLAND UNIVERSITY

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

## Appendix E

### DOCTORAL EXPERIENTIAL CAPSTONE MENTORSHIP AGREEMENT

Doctoral Students:

Doctoral Capstone Experience:

Site Mentor:

Faculty Mentor:

This Doctoral Experiential Capstone Mentorship is effective by and between the above-named Occupational Therapy Doctoral (OTD) student, Doctoral Experiential Capstone Site Mentor, and the Western New England University OTD Faculty Mentor. The following lists the learning objectives for (student), the Supervision/mentoring plan, and the responsibilities of all parties involved.

#### DOCTORAL EXPERIENTIAL CAPSTONE LEARNING OBJECTIVES:

Upon completion of the OT Doctoral Experiential Capstone, OTD Students will demonstrate, through observed

professional interactions and through reflective and professional writing, that they have become self-aware, self-determined learners, competent entry-level practitioners, and transformative leaders, as measured by:

- 1) Documentation of their experience in collaboration for program or service delivery with professionals and/or members of consumer groups who are not occupational therapists. This includes being able to negotiate the role of occupational therapy as part of an interprofessional team.
- 2) Documentation of a needs assessment for a particular population and using said assessment as the foundation for planning a successful Doctoral Experiential Capstone. Additional evidence will include feedback from consumers that indicates the impact of the project on the population they represent.
- 3) Demonstrated proficiency with the use of personal computers, learning platforms, electronic health records, and assistive technology sufficient to fully document the Doctoral Experiential Capstone for WNE as well as for members of the population served by that project.
- 4) Recognize and be able to describe the diverse systems of service delivery that are most cost-effective and considerate for health, social, and educational settings, both traditional and non-traditional. Through both clinical and reflective writing, sensitivity to cultural, linguistic, and other diversities and the ability to describe solutions for care disparities.
- 5) Documentation of the ability to work with others to identify meaningful objectives, organize, manage, and motivate people and resources, communicate effectively, and oversee action to accomplish stated program or service goals.

6) Through both clinical and reflective writing, be able to articulate the therapeutic/clinical reasoning (procedural, interactive, narrative, ethical, scientific, pragmatic) process that they use during planning, delivery, and evaluation of population-based and evidence-driven occupational

therapy services. Demonstration of the ability to implement, in existing programs, and plan for in developing programs an occupational therapy process that is occupation-based, client-centered, culturally sensitive, and ethically appropriate.

7) Documentation of experiential and scholarly projects that reflect literature in the field and that use responsive, ethical methods. The scholarly process and results should be accessible to the college and the community, especially to the population served by the project. A report of the project, presented in a professional format that others can replicate or build upon, will be evidence of accomplishment.

8) Through both clinical and reflective writing, be able to articulate a clear awareness of their own personal and professional strengths and boundaries and identify support and strategies for goal achievement.

### DOCTORAL EXPERIENTIAL CAPSTONE GROUP AND/OR INDIVIDUAL LEARNING OBJECTIVES

WNE OTD students participate in a group mentorship/supervision model in which a small group of students works together with a Faculty Mentor to develop, implement, and evaluate individual Doctoral Experiential Capstone projects that focus on a specific topic, population, and/or setting. Group objectives, which address the desired outcomes of all the group members' individual Doctoral Experiential Capstone projects, may be written. These are optional. Individual student learning objectives are written by each student based on a literature review and needs assessment, consultation, and planning with their site, faculty, and peer mentors. These objectives are specific to each individual Doctoral Experiential Capstone. They identify the desired outcomes of each student's Doctoral Experiential Capstone which are:

- 9)
- 10)
- 11)
- 12)

### DOCTORAL EXPERIENTIAL CAPSTONE MANAGEMENT/SUPERVISION PLAN:

The student will be mentored and supervised by the Site Mentor and the Faculty Mentor. The student will only participate in activities as assigned by the site or Faculty Mentor. If the student is providing skilled occupational therapy services, the supervision guidelines for the provision of occupational therapy services by students for each state must be followed.

The Doctoral Experiential Capstone is a 14-week, 448-hour mentored educational experience. AOTA/ACOTE accreditation standards state that at least 80% of those hours must be spent at the Doctoral Experiential site. Any unexcused absences must be made up to ensure completion of 448 hours and the successful completion of the doctoral experience. This must be arranged with the Site Mentor and approved by the Faculty Mentor.

The student, Faculty Mentor, Site Mentor, and Doctoral Experiential Coordinator are responsible for timely modification of previous plans and clarification of roles and responsibilities. If the Site Mentor is not available to provide on-site supervision for the student on a particular date, the Site Mentor will provide a replacement supervisor for that particular time period. The student may spend additional time at other locations within the site organization as assigned by the Site Mentor.

Any concerns about the Doctoral Experiential should be brought to the attention of the faculty or Site Mentor. If they are not able to be resolved, they should be brought to the attention of Debra Latour, Doctoral Experiential Capstone Coordinator, [debra.latour@wne.edu](mailto:debra.latour@wne.edu) or 413-782-1449.

### RESPONSIBILITIES OF ALL PARTIES

Verifying the hours the student completed.

### THE DOCTORAL STUDENT IS RESPONSIBLE FOR:

Completing all required academic classes and fieldwork prior to beginning the Community Experiential portion of the Doctoral Experiential Capstone.

Developing and maintaining a structure for working with their team to conduct and complete their Doctoral Experiential Capstone. This should include clearly delineated responsibilities and timelines, both individual and group.

Actively participating in all aspects of the Doctoral Experiential Capstone, including:

- Developing a proposal and work plan
- Negotiating a community partnership specific to each individual project
- Finding and using appropriate resources
- Completing all necessary forms and assurances

Participating in the recruitment of and negotiation with community partners regarding site and mentorship agreements and detailed plans for roles, responsibilities, schedules, and communication plans for the Doctoral Experiential Capstone.

Overseeing the conceptualization and development of each group member's Doctoral Experiential Capstone proposal, including oversight, review, and final approval and grading of the implementation project.

Overseeing preparation for and implementation of the Doctoral Experiential Capstone including following established procedures, completing WNE OTD and other forms, mentoring, and supporting the community experiential and the scholarly project.

Communicating and providing feedback regularly to the team, especially the students, in person, or via Zoom, telephone, email, or other methods.

Collaborating with the Site Mentor, Doctoral Experiential Capstone Coordinator, and leadership team on any concerns regarding student performance, site management, etc.

Overseeing the implementation of the Doctoral Experiential Capstone work plan using evidence-based mentoring and teaching strategies.

Supporting, reviewing, and finally approving the report and presentation of the project outcomes and findings, and grading of the implementation course.

#### THE DOCTORAL EXPERIENTIAL CAPSTONE SITE MENTOR IS RESPONSIBLE FOR:

Agreeing to work with Western New England University OTD program, including the identified Faculty Mentor and OTD student(s) for the duration of the doctoral experiential capstone, including providing site orientation and delineating mentorship responsibility at their community/agency site location(s).

Collaborating with the Faculty Mentor to guide the students through the needs assessment component of the project proposal, to oversee its implementation, and to collaborate in managing any problems that may arise.

Providing guidance on the logistics of completing the Doctoral Experiential Capstone at the site, including scheduling for the student, on-site support and supervision, and arranging access to necessary resources.

Collaborating with the Faculty Mentor to evaluate the student team's on-site performance and final project report and presentation.

Actively participating in regular communication with the other OTD students in your group and your Faculty Mentor in person, virtually (i.e., Zoom.), by email or other means, including giving both verbal and written feedback on implementation and documentation.

Developing and maintaining a system for documenting students' experiential hours on-site and the tasks and activities accomplished during those hours (as identified in the work plan).

Providing a written evaluation (in a format provided by the WNE OTD program) of each student's work, including on and off-site activities for the Doctoral Experiential Capstone, at midterm and at the end of the experiential.

#### THE DOCTORAL EXPERIENTIAL CAPSTONE COORDINATOR IS RESPONSIBLE FOR

Development of Doctoral Experiential Capstone Policies and Procedures

In consultation with the WNE Attorney, development and negotiation of the Doctoral Experiential Memorandum of Understanding/Agreement

Reviewing the CV, resume and/or supporting documents to verify that the Site Mentor is qualified to serve. This ensures that the student is mentored by an individual with expertise consistent with the student's area of focus. This individual may or may not be an occupational therapist.

Coordination and collaboration with University, College, Department, and Program administrators, faculty, and staff to assure that the Doctoral Experiential Capstone Program follows the appropriate rules and procedures.

Development of Doctoral Experiential Capstone Policies and Procedures

Developing and maintaining communication systems for collaboration and accountability

Overseeing the Doctoral Mentorship and Experiential Capstone courses

Overseeing the development and presentation of Doctoral Experiential portfolios

Evaluating and reporting the outcomes of the Doctoral Experiential

By signing the agreement, all parties agree to the provisions above.

---

Site Mentor Date

---

Student Date

---

OTD Faculty Mentor Date

---

Doctoral Experiential Capstone Coordinator Date

## Appendix F

# WNE DOCTORAL EXPERIENTIAL CAPSTONE ANNUAL REPORT

This document is to be completed by the Doctoral Capstone Coordinator on an annual basis and submitted to the OTD Program Chair for review and dissemination.

### **Cohort Year:**

### **Date of Report:**

### **ACOTE Standard**

A.6.3 Programs must routinely secure and document sufficient qualitative and quantitative information to allow for analysis about the extent to which the program is meeting its stated goals and objectives to inform strategic changes. This must include, but need not be limited to:

- Student evaluation of fieldwork and doctoral capstone experience.
- Evaluation of doctoral capstone outcomes

Programs must routinely and systematically analyze data to determine the extent to which the program is meeting its stated goals and objectives. An annual report summarizing analysis of data and planned action responses must be maintained. The results of ongoing evaluation must be appropriately reflected in the program's strategic plan, curriculum, and other dimensions of the program.

### **Aggregate Data**

- Cohort Data:
  - Total # of students completing the DEx
  - # of students at sites internal to WNE
    - Describe sites
  - # of students at sites external to WNE
    - Describe sites
  - Scholarship/Deliverables
    - # of student submissions to peer-reviewed journals
    - # of student submissions to peer-reviewed conferences
      - # of poster submissions
      - # of presentation submissions
    - # of student submissions to other publications (non-peer-reviewed)
    - # of student submissions to community program training materials
    - # of student submissions to community program teaching materials
    - # of student submissions to community program development
    - # of student submissions to university program teaching materials
    - # of student submissions to university program course development
    - # of student submissions to innovation
- Site Mentor Data

- Total # of Site Mentors participating in the DEx
- Weekly average mentorship meetings
- # of Site Mentors internal to WNE
  - Describe sites
- # of Site Mentors external to WNE
  - Describe sites
- Faculty Mentor Data:
  - # of Faculty Mentors participating in the DEx
  - Weekly average mentorship meetings
  - FM: Student ratio

**Student Performance**

<b>WNE OTD Doctoral Experiential Capstone (Standard) Objectives</b>	<b>Status at Midpoint</b>	<b>Status at Endpoint</b>	<b>Comments</b>
1. Collaborate with various professionals as part of an interprofessional team to advocate the role of occupational therapy in a nontraditional setting.	# Accomplished # Making progress #Not progressing		
2. Document a needs assessment for a particular population and use said assessment as the foundation for planning a successful Doctoral Experiential Capstone Project. Additional evidence will include feedback from consumers that indicates the impact of the project on the population they represent			
3. Demonstrate proficiency and professionalism with the use of personal computers, learning platforms, zoom meetings, etc. to fully document and implement Doctoral Experiential Project for WNE as well as for members of the population served.			
4. Recognize and be able to describe the diverse systems of service delivery that are most cost-effective and considerate for health, social, and educational settings, both traditional and non-traditional. Through both clinical and reflective writing, be able to articulate a sensitivity to cultural, linguistic, and other diversities and describe solutions for care disparities.			
5. Demonstrate the ability to work with others to identify meaningful objectives, organize, manage, and motivate people and resources, communicate effectively, and oversee action to accomplish stated program or service goals			
6. Demonstrate the ability to implement existing programs, and plan for developing programs, an occupational therapy process that is occupation-based, client-centered, culturally sensitive, and ethically appropriate			

7. Document an experiential and scholarly project that reflects the literature in restorative justice/community re-entry and use responsive, ethical methods. The scholarly process and results should be made accessible to the college and the community, especially to the population served by the project. A report on the project, presented in a professional format that others can replicate or build upon, will be evidence of accomplishment.			
8. Through both clinical and reflective writing, be able to articulate a clear awareness of my own personal and professional strengths and boundaries and identify supports and strategies for goal achievement.			

<b>WNE OTD Doctoral Experiential Capstone (Unique Objectives)</b>	<b>Status at Midpoint</b>	<b>Status at Endpoint</b>	
1.			
2.			
3.			
4.			

**Anecdotal**

<b>Site mentor evaluation of student performance</b> (Identify if all objectives have been met. If yes, please comment on students' achievement for each objective. If no, please identify why goal not met):	
<b>Student evaluation of Site mentor, experience and self</b> (Please comment on opportunities provided, supervisory relationship and individual performance):	

**Student Preparation (Survey Results)**

- DEx course series
- DEx manual
- DEx community
- DEx-tination series
- Student manual

**Site Mentor Support/Preparation (Survey Results)**

- SM meet & greet
- DCC telephone/zoom meetings
- Site mentor manual

## **Faculty Mentor Support/Preparation (Survey Results)**

- Faculty meeting sessions

### **Strengths**

### **Weaknesses**

### **Recommendations**

Appendix G

DOCTORAL EXPERIENTIAL CAPSTONE  
LEARNING OBJECTIVES & EVALUATION PLAN

This Experiential Learning Plan and Evaluation requires documentation of a formal evaluation mechanism and objective assessment of the student’s performance during and at the completion of the doctoral experiential component. The student, the faculty mentor, and the site mentor collaborate to ensure completion of the doctoral experience.

- Student Name:
- DEx Capstone Site:
- DEx Capstone Dates:
- DEx Capstone Site Mentor:
- DEx Capstone Faculty Mentor:

WNE OTD Learning Objectives: What does the student want/need to know? What skills does the student need to develop?

Evidence of Accomplishment: How will performance be measured and evaluated and by whom? Name the activity, project, or skill that will be accomplished. Identify the target date of completion. At midterm and final, present evidence of progress and/or accomplishment

Progress: Site and faculty mentor will rate student’s progress at midterm and final

Comments: The faculty and site mentors and the student should provide written comments regarding the student’s progress on each objective at midterm and final

Initial Approval of DEx Capstone Student Learning and Evaluation Plan

I agree with the above-stated objectives and feel that all learning objectives are obtainable within the fourteen (14) - week timeframe. I believe that the stated objectives encompass all aspects of the student role in this doctoral experience. I understand that the site mentor or student can add additional objectives at any time as the situation and experience dictate, with the approval of the faculty advisor. Any objectives that are proposed to be removed will need to be approved by the faculty mentor.

Site Mentor Signature Date	Student Signature Date
OTD Faculty Date	OTD Doctoral Experiential Capstone Coordinator Date

## LEARNING OBJECTIVES & EVALUATION PLAN

<b>WNE OTD Objective #1</b>
Document my experience in collaboration for program or service delivery with professionals and/or members of consumer groups who are not occupational therapists. This includes being able to negotiate the role of occupational therapy as part of an interprofessional team.
Planned activity or Methodology
Who is responsible?
What resources are needed?
What is the timeline?
Evidence of accomplishment
Midpoint <input type="checkbox"/> Accomplished <input type="checkbox"/> Making Progress <input type="checkbox"/> Not Progressing <input type="checkbox"/> Needs Attention
Final <input type="checkbox"/> Accomplished <input type="checkbox"/> Making Progress <input type="checkbox"/> Not Progressing <input type="checkbox"/> Needs Attention

**WNE OTD Objective #2**

Documentation of a needs assessment for a particular population and using said assessment as the foundation for planning a successful Doctoral Experiential Capstone Project. Additional evidence will include feedback from consumers that indicates the impact of the project on the population they represent.

Planned activity or Methodology

Who is responsible?

What resources are needed?

What is the timeline?

Evidence of accomplishment

Midpoint

- Accomplished
- Making Progress
- Not Progressing
- Needs Attention

Final

- Accomplished
- Making Progress
- Not Progressing
- Needs Attention

**WNE OTD Objective #3**

Demonstrated proficiency with the use of personal computers, learning platforms, electronic health records and assistive technology sufficient to fully document the Doctoral Experiential Capstone Project for WNE as well as for members of the population served by that project.

Planned activity or Methodology

Who is responsible?

What resources are needed?

What is the timeline?

Evidence of accomplishment

Midpoint

- Accomplished
- Making Progress
- Not Progressing
- Needs Attention

Final

- Accomplished
- Making Progress
- Not Progressing
- Needs Attention

**WNE OTD Objective #4**

Recognize and be able to describe the diverse systems of service delivery that are most cost-effective and considerate for health, social, and educational settings, both traditional and nontraditional. Through both clinical and reflective writing, be able to articulate a sensitivity to cultural, linguistic, and other diversities and describe solutions for care disparities.

Planned activity or Methodology

Who is responsible?

What resources are needed?

What is the timeline?

Evidence of accomplishment

Midpoint

- Accomplished
- Making Progress
- Not Progressing
- Needs Attention

Final

- Accomplished
- Making Progress
- Not Progressing
- Needs Attention

**WNE OTD Objective #5**

Document the ability to work with others to identify meaningful objectives, organize, manage, and motivate people and resources, communicate effectively, and supervise action to accomplish stated program or service goals.

Planned activity or Methodology

Who is responsible

What resources are needed?

What is the timeline?

Evidence of accomplishment

Midpoint

- Accomplished
- Making Progress
- Not Progressing
- Needs Attention

Final

- Accomplished
- Making Progress
- Not Progressing
- Needs Attention

**WNE OTD Objective #6:**

Through both clinical and reflective writing, be able to articulate the therapeutic/clinical reasoning (procedural, interactive, narrative, ethical, scientific, pragmatic) process that I use during planning, delivery, and evaluation of population-based and evidence-driven occupational therapy services. demonstrate the ability to implement, in existing programs, and plan for in developing programs, an occupational therapy process that is occupation based, client centered, culturally sensitive, and ethnically appropriate.

Planned activity or Methodology

Who is responsible?

What resources are needed?

What is the timeline?

Evidence of accomplishment

Midpoint

- Accomplished
- Making Progress
- Not Progressing
- Needs Attention

Final

- Accomplished
- Making Progress
- Not Progressing
- Needs Attention

**WNE OTD Objective #7:**

Document and experiential and scholarly project that reflects literature in the field and uses responsive, ethical models. The scholarly process and results should be made accessible to the college and the community, especially to the population served by the project. A report of the project, presented in a professional format that others can replicate or build upon, will be evidence of accomplishment.

Planned activity or Methodology

Who is responsible?

What resources are needed?

What is the timeline?

Evidence of accomplishment

Midpoint

- Accomplished
- Making Progress
- Not Progressing
- Needs Attention

Final

- Accomplished
- Making Progress
- Not Progressing
- Needs Attention

**WNE OTD Objective #8:**

Through both clinical and reflective writing, be able to articulate a clear awareness of my own personal and professional strengths and boundaries and identify supports and strategies for goal achievement.

Planned activity or Methodology

Who is responsible?

What resources are needed?

What is the timeline?

Evidence of accomplishment

Midpoint

- Accomplished
- Making Progress
- Not Progressing
- Needs Attention

Final

- Accomplished
- Making Progress
- Not Progressing
- Needs Attention

<b>WNE OTD Objective #9</b>
Planned activity or Methodology
Who is responsible?
What resources are needed?
What is the timeline?
Evidence of accomplishment
<p>Midpoint</p> <p><input type="checkbox"/> Accomplished</p> <p><input type="checkbox"/> Making Progress</p> <p><input type="checkbox"/> Not Progressing</p> <p><input type="checkbox"/> Needs Attention</p>
<p>Final</p> <p><input type="checkbox"/> Accomplished</p> <p><input type="checkbox"/> Making Progress</p> <p><input type="checkbox"/> Not Progressing</p> <p><input type="checkbox"/> Needs Attention</p>

<b>WNE OTD Objective #10:</b>
Planned activity or Methodology
Who is responsible?
What resources are needed?
What is the timeline?
Evidence of accomplishment
Midpoint <ul style="list-style-type: none"> <li><input type="checkbox"/> Accomplished</li> <li><input type="checkbox"/> Making Progress</li> <li><input type="checkbox"/> Not Progressing</li> <li><input type="checkbox"/> Needs Attention</li> </ul>
Final <ul style="list-style-type: none"> <li><input type="checkbox"/> Accomplished</li> <li><input type="checkbox"/> Making Progress</li> <li><input type="checkbox"/> Not Progressing</li> <li><input type="checkbox"/> Needs Attention</li> </ul>

<b>WNE OTD Objective #11</b>
Planned activity or Methodology
Who is responsible?
What resources are needed?
What is the timeline?
Evidence of accomplishment
Midpoint <input type="checkbox"/> Accomplished <input type="checkbox"/> Making Progress <input type="checkbox"/> Not Progressing <input type="checkbox"/> Needs Attention
Final <input type="checkbox"/> Accomplished <input type="checkbox"/> Making Progress <input type="checkbox"/> Not Progressing <input type="checkbox"/> Needs Attention

<b>WNE OTD Objective #12:</b>
Planned activity or Methodology
Who is responsible?
What resources are needed?
What is the timeline?
Evidence of accomplishment
Midpoint <input type="checkbox"/> Accomplished <input type="checkbox"/> Making Progress <input type="checkbox"/> Not Progressing <input type="checkbox"/> Needs Attention
Final <input type="checkbox"/> Accomplished <input type="checkbox"/> Making Progress <input type="checkbox"/> Not Progressing <input type="checkbox"/> Needs Attention

# DOCTORAL EXPERIENTIAL CAPSTONE STUDENT LEARNING PLAN AND EVALUATION

## MIDPOINT SITE MENTOR/STUDENT EVALUATION

Student evaluation of Site mentor, experience and self (please comment on opportunities provided, supervisory relationship and individual performance):

Site mentor evaluation of student performance (Identify if all objectives have been met. If yes, please comment on students' achievement for each objective. If no, please identify why goal not met):

Please check one:

\_\_\_\_\_ Sufficient progress has been made on the identified learning objectives, and I recommend that the student continue this Doctoral Experiential Capstone.

\_\_\_\_\_ The Student has NOT progressed towards achievement of the identified objectives for the Doctoral Capstone Experience. It is recommended that this Student's Learning and Evaluation Plan be reviewed and revised as needed

Site Mentor Signature Date	Student Signature Date
OTD Faculty Date	OTD Doctoral Experiential Capstone Coordinator                      Date

# DOCTORAL EXPERIENTIAL STUDENT LEARNING PLAN AND EVALUATION

## FINAL SITE MENTOR/STUDENT EVALUATION

Student evaluation of Site mentor, experience, and self (please comment on opportunities provided, supervisory relationship, and individual performance):

Site mentor evaluation of student performance (Identify if all objectives have been met. If yes, please comment on students' achievement for each objective. If no, please identify why goal not met):

Please check one:

\_\_\_\_\_ Sufficient progress has been made on the identified learning objectives, and I recommend that the student continue this Doctoral Experiential Capstone.

\_\_\_\_\_ The Student has NOT progressed towards achievement of the identified objectives for the Doctoral Capstone Experience. It is recommended that this Student's Learning and Evaluation Plan be reviewed and revised as needed

Site Mentor Signature Date	Student Signature Date
OTD Faculty Date	OTD Doctoral Experiential Capstone Coordinator Date

## Appendix H

### MENTORING REFERENCES AND RESOURCES

- Academic Advancement Network, Michigan State University (2020) Mentoring. <https://aan.msu.edu/mentoring/> Accreditation Council for Occupational Therapy Education (2018). 2018 Accreditation Council for Occupational Therapy
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## Appendix I

### DEX CAPSTONE E-PORTFOLIO DETAILED INSTRUCTIONS

Your e-portfolio is a curated collection of materials that illustrate the processes and products of your WNE OTD Doctoral Experiential Capstone. It tells the story of your experience from the beginning planning stage, including any changes you experienced- throughout project implementation, and to its culmination. Through the DEx Capstone portfolio, you are responsible for introducing, contextualizing, documenting, and summarizing your work.

This is a preliminary outline for your DEx Capstone e-portfolio. Please note that the contents and requirements of your e-portfolio may change between today and the end of your DEx Capstone but please begin your e-portfolio using this outline. For your OTD 651 DEX/Spring course, your portfolio should have tabs for all sections but there should be content (documents) for the highlighted ones.

#### Resume and Personal Statement:

Please include a current resume and a brief personal statement that introduces you to the readers/reviewers. The personal statement might include some brief information about your background, accomplishments, interests, values and what is important to you. You may include your future plans. This is **your** statement – keep it to a paragraph or two, but make sure it reflects what you want your audience (reviewers) to know about you

#### Introduction and Acknowledgements (Narrated PPT or Video):

Please include an introduction to and overview of your DEx Capstone project. It can be brief – a few paragraphs would be fine that gives your audience a quick look at your work. This is similar to an abstract or executive summary in an article or paper. It may be a written document, a video clip, an infographic, etc. Again, make sure it reflects what you want your audience (reviewers) to know about your DEx Capstone project. The acknowledgments are anything you want to say that recognizes people who have helped you. This section might read something like “I am grateful to my parents, my partner, and my children for their consistent love and support. Without the brilliant guidance and inspiration of my faculty mentor Dr XYZ, this work would not have been selected for presentation at the Nobel Peace Prize reception. “etc.

#### DEx Capstone Short Proposal and Workplan

You may include either the long or the short proposal here. If you have a Gantt chart or other type of workplan please include it. If not, it is fine to leave it out. Make sure that whichever document(s) you choose accurately reflects your plans at the actual start of the DEx Capstone this spring. Think of this section as what you might have given to your site to describe your hopes for the DEx Capstone and your rationale. Once accepted, you could begin your work with them.

#### Preparation for the DEx Capstone

Include notes/summaries of related activities and work accomplished from your DEx Capstone mentorships, group meetings, and/or classes. You may include a curated selection of notes and summaries or everything you have. The key here is to have the materials presented professionally and legibly. These are “raw data” about the process of your DEx Capstone.

Please include the pertinent assignments from related past courses here.

### Project Proposal

Include the final versions of your OTD 651 Project Proposal and Presentation.

DEx Capstone Community Partner (Site) (if you have an identified site/community partner and any of these resources, please include them here)

Include a well written Needs Assessment and Community Profile that reflects the population and setting that you planned to or did do your DEx with. If your topic, population, or setting have changed since you began the DEx Capstone planning, you may use either your original Needs Assessment and Community Profile or one that is more reflective of the topic, population, and setting that you ended up doing your actual DEx Capstone with. What is most important about this section is that you have a well written, professionally presented paper that shows your mastery of needs assessment.

Please also include some General Information (brochures, correspondence, websites, etc.) about your topic, population, and setting. This will help your reader to visualize the focus of your project. You may include materials about your original DEx Capstone project, your actual DEx Capstone project and anything in between.

### Doctoral Experiential Capstone

Review of Literature (i.e. Narrative, CAT, Annotated Bibliography, Literature Matrix, Article) As with the Needs Assessment and Community Profile, please include a well-written, professionally presented document that reflects a review of the literature on the topic, population, and setting of your DEx Capstone. You may use a review written for a project that was planned but not implemented or the one you did. What is important here is to show that you know how to do a scholarly review of literature and present your findings. Please include a brief introduction, your review, and a summary or conclusion.

#### 1) Time and Activity Records:

Please include your time and activity logs here

#### 2) Experiential Activities and Products:

Please include any written documents you produced or projects you worked on during your DEx Capstone. For example, if you made three-dimensional objects, you could include photos of those objects and an explanation. If you did research and produced a literature review or other type of paper, include that. If you developed an educational program,

include the materials for that. Regardless, please write a very brief introduction so that the reviewer understands what they are seeing.

### Scholarly Project and/or Product

Each DEx Capstone project has a scholarly component. Your scholarly project product(s) should be included here. These should have the components of scholarly report – background, statement of the problem, purpose/hypothesis, research question, methodology, population, data collection, data analysis, discussion and conclusion. You and your mentor should decide on the specific format, i.e. a research report, a publishable article, a conference abstract, etc. Consider Boyer’s and Glassick’s types of scholarship (Appendix K). And please refer to this resource, an excellent poster which describes these models as well as ways to assess them:

<https://medicine.hofstra.edu/pdf/faculty/facdev/facdev-prodev-paradigm.pdf>.

What is important here is that you demonstrate your ability to apply your knowledge and training in research and scholarship to a real-world problem of practice.

Reflective Writings #1, # 2, #3, #4 include the questions and responses for your reflective writing. Refer to Additional Resources section.

### Doctoral Experiential Capstone Learning Plan & Evaluation

Include your complete Doctoral Experiential Capstone Learning Plan & Evaluation. Organize this section by objective and provide evidence for each objective, so for example, you will have the page(s) for one objective, then you will follow that with evidence of what you reported on the Learning and Evaluation Plan objective form. Then you will put the next objective, followed by the evidence, and so on.

You will also need to include a written feedback (last) page of the Student Learning and Evaluation Plan which will be completed by your mentor(s).

### Telehealth Course

Include your Telehealth Course assignments, syllabus and schedule and note.

### Student Evaluation of Doctoral Experiential

Please include a completed copy of this form, which is located in the Doctoral Experiential Manual and will be posted to the class DEx Community Kodiak site.

### Final DEx Capstone Project Report

This should be a well written, professional report of approximately 5 pages. It should provide an overview of your DEx Capstone project, including such sections as the background, purpose, topic, population, setting, goals and objectives, activities, outcomes, and impact. You should decide with your DEx Capstone mentor exactly what format would best reflect your work. If you imagine the DEX Capstone proposal as the document that describes the work you had planned to do at the beginning of all this, then, this is your final

report that you would give to your client (site) if you were their consultant and you had finished your project/work.

### Final DEx Capstone Presentation

You will prepare a 10-minute PowerPoint summary to present before a Review Committee and entertain their questions and appreciate the thoughtful critique offered to you. This summary will give your audience insight to your project, what you have learned through it, and how it will inform you about your own practice of occupational therapy.

## HOW TO PREPARE FOR DEVELOPING YOUR E-PORTFOLIO

1) Take the time to watch some students from the previous cohorts explain how to make a portfolio using Google Sites (link below). You may find it helpful to know that the majority of students have found Google Sites to be free, easy to use, and effective.

a. WNE OTD Class of 2020 Explains How to Make a Portfolio using Google Sites

b. [https://wne.edu.zoom.us/rec/share/5PdILoPe3GFJSK\\_yuG\\_xSPQAQZ7lX6a823UfqfoLnhvhu56AUTzmGgH5XqBHIEW?startTime=1592849310000](https://wne.edu.zoom.us/rec/share/5PdILoPe3GFJSK_yuG_xSPQAQZ7lX6a823UfqfoLnhvhu56AUTzmGgH5XqBHIEW?startTime=1592849310000)

2) Also, take a few minutes to watch this video of Marilyn Joseph (Class of 2020)'s DEx Portfolio Review which took place July 20, 2020. In this video, she walks her audience through the portfolio, talks about her DEx project, and then has a conversation with her faculty and site mentors/consultants, and an external reviewer (someone who has not worked on the project and reviews it with an "outside" perspective. You should also ask your faculty mentor to share links to the prior work of past students. This should help you envision your own DEx capstone project and e-portfolio.

a. <https://wne.du.zoom.us/rec/share/9JYoEPb03U9LY6uW2n2EeoIhT6jqX6a81CZNqPBfyBw4O KvW135vCkxrnJrTuXna?startTime=1595260772000>

3) Follow this link to access the DEx Class of 2021 Narrated Poster Presentations. These will give you a good idea of the breadth and scope of the projects undertaken by that group of WNE OTD students.

Appendix J

**BOYERS MODEL OF SCHOLARSHIP**

MODEL	EXPLANATAION	EXAMPLES
Scholarship of Discovery	Advancement of Knowledge	<p>Publications in peer-reviewed academic forums, industry journals, and other media</p> <p>Research projects</p> <p>Working papers</p> <p>Book chapters and books</p> <p>Professional presentation</p>
Scholarship of Integration	Positioning and interpreting knowledge in broader contexts and across disciplines	<p>(Interprofessional) project, literature review, book, or textbook for a broad audience</p> <p>Professional development and non-academic workshops, courses, and publications</p> <p>Research presentations at conferences</p> <p>Communication and dissemination of knowledge to assist in understanding or solving real-world problems</p>
Scholarship of Application	Use knowledge to solve real-world problems	<p>Consultation in area of intellectual expertise</p> <p>Engage in academic activism</p> <p>Serve in leadership roles in professional organizations</p> <p>Mentor students' professional growth</p> <p>Create meaningful opportunities for students to apply and enhance their knowledge and skills in community service</p>
Scholarship of Teaching and Learning	Search for innovative approaches and best practices to develop skills and share knowledge	<p>Develop new or substantially redesign curricula or courses</p> <p>Develop innovative teaching approaches and materials Inform</p>

		teaching through interprofessional research Produce instructional videos Mentor graduate students in teaching_ Design program evaluation Disseminate research findings through publication, presentation, or funded studies
Scholarship of Engagement	Working with the community, applying college resources to pressing social, civic, and ethical problems	Reciprocal collaboration with community for teaching, research, and service Participatory action research Service-learning Experiential learning

Adapted from: Boyer, E. (1996). The Scholarship of Engagement. *Journal of Public Service & Outreach*. 1 (1), 11 – 20  
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## ADDITIONAL RESOURCES

## SAMPLE DEX CAPSTONE STUDENT INTRODUCTION



Isabel Park  
Doctor of Occupational Therapy Student Background

Isabel is a third-year occupational therapy doctorate student at Western New England University. She received both her Bachelor of Arts in English (2012) and her Master of Science in Exercise Science (2014) from the University of Connecticut. Isabel is currently completing her doctoral experiential project and graduating in August 2020. She has experience working as an associate behavior therapist in Applied Behavior Analysis (ABA) therapy as well as a paraprofessional in both general and special education classrooms.

Isabel enjoys working with young children and is especially passionate about working with children with autism spectrum disorder (ASD). She completed her master's thesis on the effects of music and movement-based intervention on the affect and motor skills of children with ASD. She hopes to continue in pediatrics, gaining a wide base of knowledge and experience throughout this doctoral experiential project, and eventually specialize in school-based occupational therapy.

Isabel has completed Level I fieldwork across a variety of pediatric settings: a nontraditional high school, a traditional preschool, an adaptive summer camp, and a Language & Learning Disabled (LLD) classroom within a public elementary school. Additionally, she has also spent time observing an early intervention program. She completed one of her level II fieldwork placements at West New York Public Schools in New Jersey through Occupational Therapy Consultants, a provider of occupational, physical and speech therapy, behavioral health and consultation services. While there, she learned how to administer various pediatric assessments, collaborate with both intra- and interprofessional teams, and treat students from grades pre-K to 12, across various classroom settings.

Isabel is a creative and highly motivated individual, professionally and personally. She is fluent (speaking, reading, writing) in Korean. In her free time, she enjoys spending time with friends and family, baking, and perfecting her tan on the beach.

## DOCTORAL EXPERIENTIAL CAPSTONE REFLECTIONS

### Reflective Writing #1 (due Week 1)

As you approach 14 weeks of both independent and collaborative study, reflect on and write about:

1. How have your expectations for the DEx Capstone evolved over the two years since you began planning it? What were/are your hopes for this Capstone experience and project? What have been or are the disappointments? How have you adapted to the changes?
2. Consider your OTD academic classes, labs, and fieldwork I experience, as well as your extracurricular activities (i.e. SOTA, COTAD, work, family, etc.) and write about three or four things you have learned that you hope to bring to the DEx Capstone.
3. Consider your Level II Fieldwork experiences. How have these changed you and write about three things that you hope to advance from Level II Fieldwork into your DEx Capstone.
4. Write about anything else that you think is important to document at this point in your academic journey.

### Reflective Writing #2 (due Week #5)

Please reflect on your experiences in planning for and designing your DEx Capstone and write 1 - 2 pages that answer these questions:

1. Describe how the first weeks (up to today) of the DEx Capstone have gone for you, including your successes and your frustrations.
2. Reflecting on the past weeks, what surprised you? What upset you? How did you deal with these?
3. Reflecting on the past year or so, especially the weeks since the DEx Capstone officially began, what strengths have you identified in yourself, especially those that you have not seen before? How will you mobilize those strengths for your DEx Capstone going forward?
4. What advice would you give to a WNE OTD student from the Year One and Year Two cohorts, especially about the DEx Capstone?

### Reflective Writing #3 (due at Week #9)

1. What have you done in your DEx Capstone (so far) that you are really proud of?
2. What has happened during your DEx Capstone (so far) that you wish you could do again, perhaps differently?
3. What has changed since your last reflective writing and how have you adapted to this change?
4. What are the three things that you look forward to learning or doing between now and the time you will give your DEx Capstone presentations

Reflective Writing #4 (due at Week#14)

Student Evaluation of Occupational Therapy Doctoral Experiential Capstone

OTD Student:

Faculty Mentor:

Site Mentor:

Doctoral Experiential Capstone Site:

Dates of Doctoral Experiential Capstone Placement:

At the conclusion of your 14-week Doctoral Experiential Capstone, please write a 3 – 5-page narrative reflection paper using the questions on this form as a guide. Be as constructive and honest as you can. The results will be reviewed with your Faculty Mentor and your Site Mentor and once signed by all, this evaluation will become a part of the Department of Occupational Therapy records, and it will have a place in your Doctoral Experiential Capstone portfolio. In the future, other students may view it as they consider whether this site would be a good match for their own Doctoral Experiential Capstone.

Briefly Describe your Doctoral Community Experiential Capstone Site/Setting. Discuss why you first chose this site/setting and what your initial expectations and hopes were. Then describe the extent to which the experience met, did not meet or exceeded your expectations. You may, of course, discuss how your expectations and understandings have changed since you originally conceived of this doctoral experiential capstone.

What would you recommend to another student who is doing a Doctoral Experiential Capstone at this site consider in their planning? What do you know now that you wish that you had known then? What should they do to prepare (i.e., suggested readings, review of specific class materials, etc.)?

How prepared do you think that you were academically (classes, labs, fieldwork, etc.) to take on the actual responsibilities of your Doctoral Experiential Capstone? Please comment on the effectiveness of your faculty and site mentors and on the overall administration of the Doctoral Experiential Capstone program. What suggestions do you have for the OTD program going forward?

Please describe a very satisfying experience at this site and a frustrating experience at this site.

What do you think you learned here that you might not have been able to learn in a class, lab, or fieldwork? How did you learn it? What do you want to know now?

Other comments or feedback?

## WNE OTD REVIEWER GUIDING QUESTIONS FOR E-PORTFOLIO REVIEW

Please consider the following questions as a guide as you review the E-Portfolio(s).

Does the portfolio demonstrate:
1. Does the portfolio demonstrate strong evidence base or conceptual framework and demonstrated skills and abilities gained from the integration of academic and clinical work?
2. Understanding of the role of occupational therapy an interprofessional team, including the ability to collaborate with other professionals and consumers?
3. Competence in conducting, documenting, and applying a review of the literature, a needs assessment, and other scholarly projects?
4. Proficiency with technology and the ability to use technology for education, scholarship, and practice?
5. An understanding of various service delivery systems including their relationship to populations and communities. funding and reimbursement systems, and regulations. etc.
6. The ability to articulate clinical reasoning (procedural= interactive= narrative. ethical: scientific, pragmatic) that guides their decisions?
7. The ability to plan for and develop programs and services using principles of occupation based. client centered and culturally sensitive practice?
8. Sensitivity to cultural, linguistic, mother diversities, awareness of disparities in access to care, and the ability to advocate with and for the consumers
9. The ability to articulate their personal and professional strengths and identify personal strategies for future goal achievement?

NOTES:

## 2023 ACOTE STANDARDS

STANDARD NUMBER	ACCREDITATION STANDARDS FOR A DOCTORAL-DEGREE-LEVEL EDUCATIONAL PROGRAM FOR THE OCCUPATIONAL THERAPIST
D.1.0.	<p><b>DOCTORAL CAPSTONE</b></p> <p>The goal of the <a href="#">doctoral capstone</a> is to provide an in-depth exposure to one or more of the following areas in occupational therapy:</p> <ul style="list-style-type: none"> <li>• Clinical skills</li> <li>• Research skills</li> <li>• Administration</li> <li>• Program development and evaluation</li> <li>• Policy development</li> <li>• <a href="#">Advocacy</a></li> <li>• Education</li> <li>• Leadership</li> </ul> <p>The doctoral capstone consists of two parts:</p> <ul style="list-style-type: none"> <li>• Capstone experience</li> <li>• Capstone project</li> </ul> <p>The student will complete a 14-week capstone experience and an individual related capstone project to demonstrate synthesis and application of knowledge gained.</p> <p>The doctoral capstone coordinator will:</p>
D.1.1.	Ensure that the doctoral capstone is designed through collaboration with the student, a faculty member in the occupational therapy educational program who holds a doctoral degree, and an individual with documented expertise in the content area of the capstone.
D.1.2.	Document that the content expert is informed of the plan for and purpose of the doctoral capstone and has content expertise in the focus area.
D.1.3.	Document that the doctoral capstone is an integral part of the program’s curriculum design and:

STANDARD NUMBER	ACCREDITATION STANDARDS FOR A DOCTORAL-DEGREE-LEVEL EDUCATIONAL PROGRAM FOR THE OCCUPATIONAL THERAPIST
	<ul style="list-style-type: none"> <li>• Reflects the mission and philosophy of the program.</li> <li>• Contributes to the development of in-depth knowledge in the designated area of interest.</li> <li>• Includes preparation consisting of a literature review, needs assessment, goals/objectives, and a plan to evaluate project outcomes. This must be completed prior to the commencement of the 14-week doctoral capstone experience.</li> </ul> <p>The doctoral capstone must be started after completion of all coursework and Level II fieldwork.</p>
D.1.4.	<p>Document that the process for ensuring valid written agreements between the organization and the program are in effect prior to and for the duration of the capstone experience.</p> <p>Ensure that there is a valid plan for the individual doctoral capstone experience that, at a minimum, includes:</p> <ul style="list-style-type: none"> <li>• Individualized specific doctoral capstone experience objectives</li> <li>• Plans for evaluation, supervision, and mentoring</li> <li>• Responsibilities of all parties</li> </ul> <p>The agreement must be signed by all parties.</p>
D.1.5.	<p>Require that the length of the doctoral capstone experience be a minimum of 14 weeks' full-time, and a minimum of 32 hours per week. This may be completed on a part-time basis as agreed upon by the organization and must be consistent</p>

STANDARD NUMBER	ACCREDITATION STANDARDS FOR A DOCTORAL-DEGREE-LEVEL EDUCATIONAL PROGRAM FOR THE OCCUPATIONAL THERAPIST
	with individualized specific objectives and capstone project. This must be equivalent in length to 14 full- time weeks of at least 32 hours per week. The program must have a mechanism to document that the students meet the requirements for capstone length. Prior fieldwork or work experience may not be substituted for this doctoral capstone experience.
D.1.6.	Ensure completion and dissemination of an individual doctoral capstone project that relates to the doctoral capstone experience and demonstrates synthesis of in-depth knowledge in the focused area of study.
D.1.7.	Document a formal evaluation mechanism for objective assessment of the student’s performance during and at the completion of the doctoral capstone.

## ACOTE STANDARDS GLOSSARY

**ADVOCACY:** Efforts directed toward promoting occupational justice and empowering clients to seek and obtain resources to fully participate in their daily life occupations. Efforts undertaken by the practitioner are considered advocacy, and those undertaken by the client are considered self-advocacy and can be promoted and supported by the practitioner (American Occupational Therapy Association [AOTA], 2020b).

**CAPSTONE COORDINATOR:** Faculty member of record who is specifically responsible for the program's compliance with the capstone requirements of Standards Section D.1.0 and is assigned to the occupational therapy educational program as a full-time faculty member as defined by ACOTE. The title of the individual may vary by institutional practices.

**CURRICULUM DESIGN:** An overarching set of assumptions that explains how the curriculum is planned, implemented, and evaluated. Typically, curriculum design includes educational goals and curriculum threads and provides a clear rationale for the selection of content, the determination of scope of content, and the sequence of the content. A curriculum design is expected to be consistent with the mission and philosophy of the sponsoring institution and the program.

**DOCTORAL CAPSTONE:** An in-depth exposure to a concentrated area, which is reflective of the program's curriculum design. This in-depth exposure may be in one or more of the following areas: clinical skills; research skills; scholarship; administration; leadership; program development and evaluation; and policy development, advocacy, and education. The doctoral capstone consists of two parts: the capstone experience and the capstone project.

**CAPSTONE EXPERIENCE:** An in-depth exposure in a concentrated area that includes activities in a mentored practice setting and may also include activities in non-mentored practice setting that meets developed goals/objectives of the doctoral capstone. The mentored practice setting may be in person, virtual, or hybrid and includes learning experiences.

**CAPSTONE PROJECT:** An individual project that is completed by a doctoral-level student that demonstrates the student's ability to relate theory to practice and to synthesize in-depth knowledge in a practice area that relates to the capstone experience.

**EDUCATIONAL GOALS:** Educational goals "reflect broad abilities of graduates" and include descriptions of students' characteristics upon graduation (AOTA, 2021b).

**EVALUATION:** "The comprehensive process of obtaining and interpreting the data necessary to understand the person, system, or situation... Evaluation requires synthesis of all data obtained, analytic interpretation of that data, reflective clinical reasoning, and reconsideration of occupational performance and contextual factors"

(Hinojosa et al, 2014, as cited in AOTA, 2020b, p. 76).

**FORMATIVE EVALUATION:** Evaluation method that includes data collected on an ongoing basis to determine incremental changes in a process or program.

**SUMMATIVE EVALUATION:** Evaluation method that occurs less frequently than formative evaluation. Data is typically collected at the end of a process or program.

**EXPERIENTIAL LEARNING:** Method of educating through first-hand experience. Skills, knowledge, and experience are acquired outside of the traditional academic classroom setting and may include service-learning projects.

**MENTORING:** A relationship between two people in which one person (the mentor) is dedicated to the personal and professional growth of the other (the mentee). A mentor has more experience and knowledge than their mentee.

**CONTENT MENTOR:** Expertise in the content area of the project.

**FACULTY MENTOR:** Person who meets the qualifications to support the objectives of the project and is familiar with the program's curriculum design.

**SCHOLARSHIP:** "A systematic investigation...designed to develop or to contribute to generalizable knowledge" (Protection of Human Subjects, 2009). Scholarship is made public, subject to review, and part of the discipline or professional knowledge base (Glassick et al., 1997). It allows others to build on it and further advance the field (AOTA, 2022).

**SCHOLARSHIP AGENDA:** Captures scholarship in the areas of teaching, research, and/or service. It engages faculty in academically relevant works that simultaneously meet campus mission and goals, meet the needs of the program, and are reflected in the curriculum design.

**SCHOLARSHIP OF DISCOVERY:** Engagement in activity that leads to the development of knowledge for its own sake. The Scholarship of Discovery encompasses original research that contributes to expanding the knowledge base of a discipline (Boyer, 1990).

**SCHOLARSHIP OF INTEGRATION:** Investigations making creative connections both within and across disciplines to integrate, synthesize, interpret, and create new perspectives and theories (Boyer, 1990).

**SCHOLARSHIP OF APPLICATION:** Practitioners apply the knowledge generated by Scholarship of Discovery or Integration to address real problems at all levels of society (Boyer, 1990). In occupational therapy, an example would be the application of theoretical knowledge to practice interventions or to teaching in the classroom.

**SCHOLARSHIP OF TEACHING AND LEARNING:** "Involves the systematic study of teaching and/or learning and the public sharing and review of such work through presentations, publications, and performances" (McKinney, 2007, p. 10).

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