

**OTA BACCALAUREATE-DEGREE-LEVEL**

**CANDIDACY APPLICATION**

#### (Step 1 of the 3-Step Process)

**2018 STANDARDS**

This application is not intended to address all of the [2018 Accreditation Standards for a Baccalaureate-Degree-Level Educational Program for the Occupational Therapy Assistant](http://www.aota.org/~/media/Corporate/Files/EducationCareers/Accredit/StandardsReview/2018-ACOTE-Standards-Interpretive-Guide.pdf). It is the institution’s responsibility to become thoroughly apprised of each Standard as it progresses through the 3‑step process.

**DIRECTIONS: This document is intended to assist you to prepare the Candidacy Application materials. You will be asked to electronically submit requested information through ACOTE Online (https://acote.aota.org). Please respond to all requested information as indicated; you will receive separate instructions for submission of these materials.**

**OVERVIEW OF THE PROGRAM**

**Provide an overview of the program organized using the headings below. Respond within the provided narrative box.**

* **Overview: size of the school, location (rural or urban), sponsorship (public or private and by whom), mission (research, public service, adult learner), and if the program will meet a specific need in that area of the state or country**
* **Mission and philosophy of the program**
* **Curriculum design and threads**
* **Number of student cohorts, number of students in each cohort, and start dates**
* **Length of the program**
* **Current staffing pattern**
* **Institutional support and approval**
* **Strengths of the program and the greatest barriers to program development**

**Provide a Web link to the institution’s catalog. Please copy and paste the URL address and ensure it opens up properly for catalog viewing.**

**URL:**

**OTA BACCALAUREATE-DEGREE-LEVEL STANDARDS SECTION A: GENERAL REQUIREMENTS**

For each Standard, provide a narrative response that addresses the program’s compliance or planned compliance with that Standard and prepare the documents in the “Instructions” sections. The narrative statements and all requested documentation should then be uploaded to ACOTE Online (<https://acote.aota.org>).

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| SECTION A: GENERAL REQUIREMENTS | |
| *A.1.0. SPONSORSHIP AND ACCREDITATION* | |
| *A.1.1.* | *Institutional Accreditation*  *The sponsoring institution(s) and affiliates, if any, must be accredited by an institutional accrediting agency recognized by the U.S. Department of Education (USDE).* |
| Narrative Response: | (Indicate sponsoring institution’s accrediting body and year of last full accreditation review): |
| Instructions: | Provide documentation (e.g., printout of institutional accreditor’s webpage, copy of accreditation certificate) that the sponsoring institution holds current accreditation from a recognized institutional accrediting agency. |
| *A.1.2.* | *Institutional Authority Sponsoring institution(s) must be authorized under applicable law or other acceptable authority to provide a program of postsecondary education and have appropriate degree-granting authority, or the institution must be a program offered within the military services.* |
| Narrative Response: |  |
| Instructions: | Provide documentation that the sponsoring institution is legally authorized to provide a program of postsecondary education and holds degree-granting authority that is appropriate to the degree offered. |
| *A.1.3.* | *Institutional Setting Accredited occupational therapy assistant educational programs must be established in community, technical, junior, and senior colleges; universities; medical schools; or military institutions.* |
| Narrative Response: |  |
| Instructions: | Provide evidence (e.g., catalog page) that the program is located in a community, technical, junior, or senior college; university, medical school; or military institution. |
| *A.2.0. ACADEMIC RESOURCES* | |
| *A.2.1.* | *Program Director The program must identify an individual as the program director who is assigned to the occupational therapy educational program as a full-time core faculty member as defined by ACOTE. The director may be assigned other institutional duties that do not interfere with the management and administration of the program. The institution must document that the program director has sufficient release time to ensure that the needs of the program are being met.*  *The program director must be an initially certified occupational therapist or occupational therapy assistant who is licensed or otherwise regulated according to regulations in the state(s) or jurisdiction(s) in which the program is located. The program director must hold a minimum of a master’s degree awarded by an institution that is accredited by a USDE-recognized institutional accrediting agency. The master’s degree is not limited to a master’s degree in occupational therapy.*  *For degrees from institutions in countries other than the United States, ACOTE will determine an alternative and equivalent external review process.*  *The program director must have a minimum of 5 years of documented experience in the field of occupational therapy. This experience must include:*   * *Clinical practice as an occupational therapist or occupational therapy assistant.* * *Administrative experience including, but not limited to, program planning and implementation, personnel management, evaluation, and budgeting.* * *Scholarship (e.g., scholarship of application, scholarship of teaching and learning).* * *Understanding of and experience with occupational therapy assistants.* * *At least 2 years of experience in a full-time academic appointment with teaching responsibilities at the postsecondary level.*   *The program director must be responsible for the management and administration of the program, including planning, evaluation, budgeting, selection of faculty and staff, maintenance of accreditation, and commitment to strategies for professional development.*  *The program director position cannot be shared.* |
| Narrative Response: |  |
| Instructions: | Provide the following:   * Documentation that the program director is assigned full-time to the occupational therapy educational program and evidence of release time provided for that position. Release time documentation must be from the institution (e.g., signed letter from administration, employment/annual contract, job description). The document must specify the numerical release time provided (e.g., percentage, credit hours compared to regular faculty hours). * Documentation of initial certification. * Current license or credential for state(s) or jurisdiction(s) in which the program is located. * Copy of diploma or transcript indicating degree level obtained from an accredited institution. * Program director’s curriculum vitae indicating work history, experience as an occupational therapist/occupational therapy assistant in practice, description of administrative experiences and duties, evidence of experience in practice, educational, and/or volunteer activities with occupational therapy assistants, and years of experience in a full-time academic appointment with teaching responsibilities at the postsecondary level. * A complete position description for the program director that indicates that the program director will be responsible for management and administration of the program, including planning, evaluation, budgeting, selection of faculty and staff, maintenance of accreditation, and commitment to strategies for professional development. |
| *A.2.2.* | *FTE Faculty Composition  The program must have at least three full-time equivalent (FTE) faculty positions at each accredited location where the program is offered.*  *At a minimum, each program must have a core faculty who is an occupational therapist and a core faculty who is an occupational therapy assistant.* |
| Narrative Response: |  |
| Instructions: | Provide the following:   * Documentation of at least three full-time equivalent faculty positions at each accredited location. * Documentation that at minimum, there is one core faculty member who is primarily practicing as an occupational therapist and one core faculty member who is primarily practicing as an occupational therapy assistant. For the purpose of this Standard, practice is considered either OTA clinical practice or OTA education. |
| *A.2.3.* | *Program Director and Faculty Qualifications The program director and faculty must possess:*   * *The academic and experiential qualifications and backgrounds (identified in documented descriptions of roles and responsibilities) that are necessary to meet program objectives and the mission of the institution.* * *Documented expertise in their area(s) of teaching responsibility and knowledge of the content delivery method (e.g., distance learning). Evidence of expertise in teaching assignments might include documentation of continuing professional development, relevant experience, faculty development plan reflecting acquisition of new content, incorporation of feedback from course evaluations, and other sources.* * *The expertise necessary to ensure appropriate curriculum design, content delivery, and program evaluation.* |
| Narrative Response: |  |
| Instructions: | Provide the following:   * A plan for the recruitment and hiring of OTA program faculty who will possess the qualifications and backgrounds necessary to meet program objectives and the mission of the institution. * Job descriptions for faculty that include the requirement for documented expertise in their area(s) of teaching responsibility and knowledge of the content delivery method. |
| *A.2.4.* | *Academic Fieldwork Coordinator The program must identify an individual for the role of academic fieldwork coordinator who is specifically responsible for the program’s compliance with the fieldwork requirements of Standards Section C.1.0 and is assigned to the occupational therapy educational program as a full-time core faculty member as defined by ACOTE. The academic fieldwork coordinator may be assigned other institutional duties that do not interfere with the management and administration of the fieldwork program. The institution must document that the academic fieldwork coordinator has sufficient release time and support to ensure that the needs of the fieldwork program are being met.*  *This individual must be an occupational therapist or occupational therapy assistant who is licensed or otherwise regulated according to regulations in the state(s) or jurisdiction(s) in which the program is located. The academic fieldwork coordinator must have at least 2 years of clinical practice experience as an occupational therapist or occupational therapy assistant and hold a minimum of a baccalaureate degree awarded by an institution that is accredited by a USDE-recognized institutional accrediting agency.*  *For degrees from institutions in countries other than the United States, ACOTE will determine an alternative and equivalent external review process.* |
| Narrative Response: |  |
| Instructions: | Upload a job description detailing responsibilities of the academic fieldwork coordinator that reflect all requirements of the Standard, including an indication of release time provided for that position. Release time documentation must be from the institution (e.g., signed letter from administration, employment/ annual contract, job description). The document must specify the numerical release time provided (e.g., percentage, credit hours compared to regular faculty hours). |
| *A.2.6.* | *Licensed OT and OTA Faculty Core faculty who are occupational therapy practitioners and teaching occupational therapy content must be currently licensed or otherwise regulated in the state or jurisdiction as an occupational therapist or occupational therapy assistant.*  *Faculty in residence and teaching at additional locations must be currently licensed or otherwise regulated according to regulations in the state(s) or jurisdiction(s) in which the additional location is located.*  *For programs outside of the United States or its jurisdictions, core faculty who are occupational therapists or occupational therapy assistants and who are teaching occupational therapy content must be currently licensed or regulated in accordance with their country’s regulations.* |
| Narrative Response: |  |
| Instructions: | Upload a job description for core OTA faculty that includes the requirement for licensure in the state or jurisdiction in which the program is located. |
| *A.2.7.* | *Faculty Degrees The majority of full-time core faculty who are occupational therapy practitioners teaching in the program must hold a minimum of a master’s degree awarded by an institution that is accredited by a USDE-recognized regional accrediting body. All full-time faculty must hold a minimum of a baccalaureate degree that is awarded by an institution that is accredited by a USDE-recognized institutional accrediting agency. The degrees are not limited to occupational therapy.*  *At least 50% of full-time core faculty must hold a minimum of a master’s degree. The program director is counted as a faculty member.*  *For degrees from institutions in countries other than the United States, ACOTE will determine an alternative and equivalent external review process.* |
| Narrative Response: |  |
| Instructions: | Identify the anticipated timetable to hire full-time core faculty who will meet the requirements of the Standard. If full-time core faculty have already been hired, upload documentation that they have a minimum of a baccalaureate degree awarded by an institution that is accredited by a USDE-recognized regional or national accrediting body and that at least 50% of full-time core faculty hold a minimum of a master’s degree from an institution that is accredited by a USDE-recognized institutional accrediting agency. |
| *A.2.9.* | *Sufficient Faculty The occupational therapy assistant faculty at each location where the program is offered must be sufficient in number to ensure appropriate curriculum design, content delivery, and program evaluation. Multiple adjuncts, part-time faculty, or full-time faculty may be configured to meet this goal.* |
| Narrative Response: |  |
| Instructions: | Provide a timeline for non-discriminatory recruitment and hiring of OTA program faculty to ensure that faculty are sufficient in number and possess the necessary expertise to ensure appropriate curriculum design, content delivery, and program evaluation. |
| *A.2.10.* | *Clerical and Support Staff Clerical and support staff must be provided to the program, consistent with institutional practice, to meet programmatic, administrative, fieldwork, and baccalaureate project requirements, including support for any portion of the program offered by distance education.* |
| Narrative Response: |  |
| Instructions: | Provide documentation (e.g., job description) for the clerical and support staff to be provided to the OTA program. In the narrative, please explain how the support provided is in alignment with institutional practice and is equally reflective of the support provided to other programs similar to the OTA program at the institution. In addition, please describe the support provided for distance learning technology if any portion of the program is offered by distance education. |
| *A.2.11.* | *Budget The program must be allocated a budget of regular institutional funds, not including grants, gifts, and other restricted sources, sufficient to implement and maintain the objectives of the program and to fulfill the program’s obligation to matriculated and entering students.* |
| Narrative Response: |  |
| Instructions: | Enter data into the Financial Resources form documenting that sufficient institutional funds are budgeted and available for the start-up of the program. |
| *A.2.12.* | *Adequate Space*   * *Adequate classroom and laboratory space, including storing and securing of equipment and supplies, must be provided by the institution and assigned to the occupational therapy assistant program on a priority basis. If laboratory space is provided by another institution or agency, there must be a written and signed agreement to ensure assignment of space for program use.* * *The program director and faculty must have office space consistent with institutional practice.* * *Adequate space must be provided for the private advising of students.* |
| Narrative Response: |  |
| Instructions: | Provide the following:   * A floor plan indicating the classroom and laboratory space, including designated space to store and secure OTA equipment and supplies, office space for the OTA program director and faculty, and space for private advising of students to be used by the program. * Documentation that classroom and laboratory space to be provided by the institution will be assigned to the OTA program on a priority basis. * If applicable, a written and signed agreement to ensure assignment of space for program use that is provided by another institution or agency. |
| *A.2.13.* | *Equipment, Supplies, and Evaluative and Treatment Methodologies*   * *Appropriate and sufficient equipment and supplies must be provided by the institution for student use during the didactic, fieldwork, and baccalaureate project components of the curriculum.* * *Students must be given access and opportunity to use the evaluative and treatment methodologies that reflect current evidence-based practice in the geographic area served by the program.* |
| Narrative Response: |  |
| Instructions: | Provide a list of equipment, supplies, and evaluative and treatment methodologies planned for the OTA program. |
| *A.2.14.* | *Library, Reference Materials, Instructional Aids, and Technology*   * *Students must have ready access to a supply of current and relevant books, journals, periodicals, computers, software, and other reference materials needed to meet the requirements of the curriculum. This may include, but is not limited to, libraries, online services, interlibrary loan, support, and resource centers.* * *Instructional aids and technology must be available in sufficient quantity and quality to be consistent with the program objectives and teaching methods. Student support services must also be available.* |
| Narrative Response: |  |
| Instructions: | Provide a list of current and relevant books, journals, periodicals, computers, software, other reference materials, online services, and instructional aids and technology that will be available to the OTA program. |
| *A.2.15.* | *Distance Education*  *If any portion of the program is offered through distance education, it must include:*   * *A process through which the program establishes that the student who registers in a distance education course or program is the same student who participates in and completes the program and receives academic credit.* * *Technology and resources that are adequate to support a distance-learning environment.* * *A process to ensure that faculty are adequately trained and skilled to use distance education methodologies.*   *The program must provide documentation of the processes involved and evidence of implementation.* |
| Narrative Response: |  |
| Instructions: | If the program offers distance education, provide documentation of:   * The process through which the program will verify that the student who registers in a distance education course or program is the same student who participates in and completes the program and receives academic credit (e.g., in-person proctored examinations, audio/video conferencing using a webcam and live proctors, biometric/hardware scanning using fingerprint, eye, typing pattern or digital photograph recognition, challenge questions based on third party data). * Available technology and resources to support a distance-learning environment. * Evidence that OTA faculty will be adequately trained and skilled to use distance education methodologies. |
| *A.3.0. STUDENTS* | |
| *A.3.1.* | *Admission Criteria Admission of students to the occupational therapy assistant program must be made in accordance with the practices of the institution. There must be stated admission criteria that are clearly defined and published and reflective of the demands of the program.* |
| Narrative Response: |  |
| Instructions: | Provide a planned copy of OTA program admission materials to be published (e.g., program brochure/flyer, website, catalog). If any portion of the program is to be offered by distance education, include the admission criteria that inform students of technology and required competencies for those components of the program. |
| *A.3.2.* | *Admission Policies Polices pertaining to standards for admission, advanced placement, transfer of credit, credit for experiential learning (if applicable), and prerequisite educational or work experience requirements must be readily accessible to prospective students and the public.* |
| Narrative Response: |  |
| Instructions: | Provide a planned copy of standards for admission, advanced placement, transfer of credit, credit for experiential learning (if applicable), and prerequisite educational or work experience requirements (e.g., program brochure/flyer, website, catalog). |
| *A.3.3.* | *Credit for Previous Courses/Work Experience  The program must document implementation of a mechanism to ensure that students receiving credit for previous courses and/or work experience have met the content requirements of the appropriate baccalaureate Standards.* |
| Narrative Response: |  |
| Instructions: | Provide documentation of the planned mechanism for giving credit for previous coursework and/or work experience. |
| *A.3.6.* | *Student Support Services Students must be informed of and have access to the student support services that are provided to other students in the institution. Distance students must have access to the same resources as campus students.* |
| Narrative Response: |  |
| Instructions: | Provide documentation (e.g., program or institution handbook) that includes a description of available support services. |
| *A.4.0. PUBLIC INFORMATION & POLICIES* | |
| *A.4.4.* | *Published Policies and Procedures  The program must have documented policies and procedures, which are made available to students and ensure the consistent application of each of the following:*   * *Policy and procedures for processing student and faculty grievances must be defined and published.* * *Student withdrawal and refunds of tuition and fees must be published and made known to all applicants.* * *Student probation, suspension, and dismissal must be published and made known.* * *Appropriate use of equipment and supplies and for all educational activities that have implications for the health and safety of clients, students, and faculty (including infection control and evacuation procedures) must be documented and made known.* * *Graduation requirements, tuition, and fees must be accurately stated, published, and made known to all applicants. When published fees are subject to change, a statement to that effect must be included. This includes fees associated with distance education.* |
| Narrative Response: |  |
| Instructions: | Provide a copy or planned copy of the institution’s or program’s published policies and procedures as identified in the Standard. |
| *A.5.0. CURRICULUM FRAMEWORK The curriculum framework is a description of the program that includes the program’s mission, philosophy, and curriculum design.* | |
| *A.5.1.* | *Curriculum-Preparation to Practice as a Generalist The curriculum must include preparation for practice as a generalist with a broad exposure to practice settings (e.g., school, hospital, community, long-term care) and practice areas, including new and emerging areas (as defined by the program). The curriculum must prepare students to work with a variety of populations including, but not limited to, infants, children, adolescents, adults, and older adults in areas of physical and mental health.* |
| Narrative Response: |  |
| Instructions: | * Provide a list indicating which courses address current practice settings and which courses address emerging practice areas. * Provide a list indicating which courses prepare students to work with infants, children, adolescents, adults, and older adults. * Provide a list indicating which courses prepare students to work in areas of physical and mental health. |
| *A.5.2.* | *Curriculum—Preparation and Application of In-depth Knowledge  The curriculum design must include course objectives and learning activities demonstrating preparation and application of in-depth knowledge in practice skills, administration, leadership, advocacy, or education through the baccalaureate project.* |
| Narrative Response: |  |
| Instructions: | Provide a statement identifying which courses will provide in-depth knowledge in preparation for the development of the baccalaureate project. Provide 2-3 examples of objectives and learning activities that will demonstrate preparation and application of one of the areas (i.e., practice skills, administration, leadership, advocacy, or education) identified in the Standard. |
| *A.5.3.* | *Program Length The program must document a system and rationale for ensuring that the length of study of the program is appropriate to the expected learning and competence of the graduate.* |
| Narrative Response: |  |
| Instructions: | Provide a statement explaining the system and rationale (e.g., standards for professional education, comparability across institutions, comparability within the institution) for determining that the length of study is appropriate to the expected learning objectives and competence of the graduate. |
| Additional Data: | Beginning when students are considered enrolled in the program:  a. Indicate the length of the program in months, only including the months that classes are in session or students are on fieldwork (e.g., 24 months):  b. Indicate the total length of time it will take students to complete the program, including the months that students are in class, on fieldwork, or on breaks (e.g. 28 months): |
| *A.5.4.* | *Program Mission and Philosophy*  *The statement of the mission of the occupational therapy assistant program must:*   * *Be consistent with and supportive of the mission of the sponsoring institution.* * *Explain the unique nature of the program and how it helps fulfill or advance the mission of the sponsoring institution, including religious missions.*   *The statement of philosophy of the occupational therapy assistant program must:*   * *Reflect the current published philosophy of the profession.* * *Include a statement of the program’s fundamental beliefs about human beings and how they learn.* |
| Narrative Response: |  |
| Instructions: | Provide the following:   * The mission statement of the occupational therapy assistant program that addresses the requirements of the Standard. * The mission statement of the sponsoring institution. * The OTA program’s philosophy statement that describes the program’s definition regarding scope of occupational therapy (consistent with the current published philosophy of the profession) and describes the learning process and the program’s beliefs about how students learn. |
| *A.5.5.* | *Curriculum Design*  *The curriculum design must reflect the mission and philosophy of both the occupational therapy assistant program and the institution and must provide the basis for program planning, implementation, and evaluation. The design must identify curricular threads and educational goals and describe the selection of the content, scope, and sequencing of coursework. The instructional design must reflect the curriculum and ensure appropriate content delivery.* |
| Narrative Response: |  |
| Instructions: | Provide the program’s curriculum design that includes the following elements:   * Curriculum design identifies major content areas (e.g., “threads” or themes) to be taught in the curriculum. * Curriculum design content themes are consistent with the program’s mission statement. * Curriculum design content themes reflect the essential concepts of the profession’s philosophy of occupational therapy. * Curriculum design content (e.g., “threads” or themes) and program’s beliefs about learning clearly demonstrate the rationale for courses offered, sequencing of courses, and evaluation strategies. * Student learning outcomes (goals) are stated for the curriculum content themes. * The curriculum design (content threads) show the scope (depth and breadth) of the program offered. * A description of how the instructional design reflects the curriculum and ensures appropriate content delivery is included. |
| *A.5.6.* | *Scholarship Agenda*  *The program must have a documented agenda of scholarship that reflects the curriculum design and mission of the program and institution.* |
| Narrative Response: |  |
| Instructions: | Provide a statement describing the scholarship agenda for the program and how this reflects the curriculum design and mission of the program and institution. Explain how the concepts of scholarship will be included in the curriculum and their relationship to the mission of the program and institution. |
| *A.6.0. STRATEGIC PLAN AND PROGRAM ASSESSMENT For programs that are offered at more than one location, the program’s strategic plan, evaluation plan, and results of ongoing evaluation must address each program location as a component of the overall plan.* | |
| *A.6.1.* | *Strategic Plan The program must document a current strategic plan that articulates the program’s future vision and guides the program development (e.g., faculty recruitment and professional growth, scholarship, changes in the curriculum design, priorities in academic resources, procurement of fieldwork sites). A program strategic plan must be for a minimum of a 3-year period and include, but need not be limited to,*   * *The program must document a current strategic plan that articulates the program’s future vision and scholarship agenda, which guides the program (e.g., faculty recruitment and professional growth, scholarship, changes in the curriculum design, priorities in academic resources, procurement of fieldwork sites and baccalaureate project). A program strategic plan must reflect a minimum of a 3-year period and include, but need not be limited to:* * *Evidence that the plan is based on program evaluation and an analysis of external and internal environments.* * *Long-term goals that address the vision and mission of both the institution and the program, as well as specific needs of the program.* * *Specific measurable action steps with expected timelines by which the program will reach its long-term goals.* * *Person(s) responsible for action steps.* * *Evidence of periodic updating of action steps and long-term goals as they are met or as circumstances change.* |
| Narrative Response: |  |
| Instructions: | Provide the program’s current strategic plan (see Strategic Plan template) that addresses all of the requirements of Standard A.6.1. |
| *A.6.2.* | *Professional Development Plans The program director and each faculty member who teaches two or more courses must have a current written professional growth and development plan. Each plan must contain the signature of the faculty member and supervisor (electronic/typed signature is acceptable). At a minimum, the plan must include, but need not be limited to:*   * *Goals to enhance the faculty member’s ability to fulfill designated responsibilities (e.g., goals related to areas of teaching responsibility, teaching effectiveness, scholarly activity).* * *Evidence of currency in the areas of teaching responsibilities.* * *Specific measurable action steps with expected timelines by which the faculty member will achieve the goals.* * *Evidence of annual updates of action steps and goals as they are met or as circumstances change.* * *Identification of the ways in which the faculty member’s professional development plan will contribute to attaining the program’s strategic goals.* * *The individual faculty member’s designated responsibilities (e.g., every plan does not need to include scholarly activity if this is not part of the faculty member’s responsibilities).* |
| Narrative Response: |  |
| Instructions: | Provide a faculty development plan for the program director and each faculty member hired who teaches two or more courses that will ensure professional growth as a means of enhancing the knowledge and skills necessary to fulfill the duties of the program director. Briefly describe the institutional support for this plan. If the program director does not yet meet the requirements of Standard A.2.1, include action steps in the professional development plan to ensure that the program director meets the requirements prior to starting the first class of students in occupational therapy assistant coursework (e.g., plan for mentoring, co-teaching, additional coursework related to teaching skills, etc.) |

**OTA BACCALAUREATE-DEGREE-LEVEL STANDARDS SECTION B: CONTENT REQUIREMENTS**

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| ***SECTION B (B.1.0-B.7.5)*** | ***CONTENT REQUIREMENTS  The content requirements are written as expected student outcomes. Faculty are responsible for developing learning activities and evaluation methods to document that students meet these outcomes. Level II Fieldwork, the Baccalaureate Project, or the Doctoral Capstone Experience and Project syllabi may not be used to document compliance with a section B content Standard.*** |
| Narrative Response: |  |
| Instructions: | After reviewing 2018 OTA Baccalaureate-Degree-Level Standards B.1.0. – B.7.5 below, prepare the OTA baccalaureate program’s planned course sequence to include course titles, descriptions, credits, and semester/quarter offered as well as a sample course syllabus. |

| **Number** | **2018 OTA Baccalaureate-Degree-Level Standard** | |
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| ***B.1.0.*** | ***FOUNDATIONAL CONTENT REQUIREMENTS Program content must be based on a broad foundation in the liberal arts and sciences. A strong foundation in the biological, physical, social, and behavioral sciences supports an understanding of occupation across the lifespan. If the content of the Standard is met through prerequisite coursework, the application of foundational content in the sciences must also be evident in professional coursework. The student will be able to:*** | |
| *B.1.1.* | *Human Body, Development, and Behavior* | *Demonstrate knowledge of:*   * *The structure and function of the human body to include the biological and physical sciences, neurosciences, kinesiology, and biomechanics.* * *Human development throughout the lifespan (infants, children, adolescents, adults, and older adults). Course content must include, but is not limited to, developmental psychology.* * *Concepts of human behavior to include the behavioral sciences, social sciences, and science of occupation.* |
| *B.1.2.* | *Sociocultural, Socioeconomic, Diversity Factors, and Lifestyle Choices* | *Apply knowledge and appreciation of the role of sociocultural, socioeconomic, and diversity factors, as well as lifestyle choices in contemporary society to meet the needs of persons, groups, and populations (e.g., principles of psychology, sociology, and abnormal psychology).* |
| *B.1.3.* | *Social Determinants of Health* | *Demonstrate knowledge of the social determinants of health for persons, groups, and populations with or at risk for disabilities and chronic health conditions. This must include an understanding of the epidemiological factors that impact the public health and welfare of populations.* |
| *B.1.4.* | *Quantitative Statistics and Qualitative Analysis* | *(No related Standard)* |
| ***B.2.0.*** | ***OCCUPATIONAL THERAPY THEORETICAL PERSPECTIVES***  ***Current and relevant interprofessional perspectives including rehabilitation, disability, and developmental as well as person/population-environment-occupation models, theories and frameworks of practice. The program must facilitate the development of the performance criteria listed below. The student will be able to:*** | |
| *B.2.1.* | *Scientific Evidence, Theories, Models of Practice, and Frames of Reference* | *Apply scientific evidence, theories, models of practice, and frames of reference that underlie the practice of occupational therapy to guide and inform interventions for persons, groups, and populations in a variety of practice contexts and environments.* |
| *B.2.2.* | *Theory Development* | *Define the process of theory development and its importance to occupational therapy.* |
| ***B.3.0.*** | ***BASIC TENETS OF OCCUPATIONAL THERAPY***  ***Coursework must facilitate development of the performance criteria listed below. The student will be able to:*** | |
| *B.3.1.* | *OT History, Philosophical Base, Theory, and Sociopolitical Climate* | *Apply knowledge of occupational therapy history, philosophical base, theory, and sociopolitical climate and their importance in meeting society’s current and future occupational needs as well as how these factors influence and are influenced by practice.* |
| *B.3.2.* | *Interaction of Occupation and Activity* | *Demonstrate knowledge of and apply the interaction of occupation and activity, including areas of occupation, performance skills, performance patterns, context(s) and environments, and client factors.* |
| *B.3.3.* | *Distinct Nature of Occupation* | *Explain to consumers, potential employers, colleagues, third-party payers, regulatory boards, policymakers, and the general public the distinct nature of occupation and the evidence that occupation supports performance, participation, health, and well-being.* |
| *B.3.4.* | *Balancing Areas of Occupation, Role in Promotion of Health, and Prevention* | *Demonstrate knowledge of scientific evidence as it relates to the importance of balancing areas of occupation; the role of occupation in the promotion of health; and the prevention of disease, illness, and dysfunction for persons, groups, and populations.* |
| *B.3.5.* | *Effects of Disease Processes* | *Demonstrate knowledge of the effects of disease processes including heritable diseases, genetic conditions, mental illness, disability, trauma, and injury on occupational performance.* |
| *B.3.6.* | *Activity Analysis* | *Demonstrate activity analysis in areas of occupation, performance skills, performance patterns, context(s) and environments, and client factors to implement the intervention plan.* |
| *B.3.7.* | *Safety of Self and Others* | *Demonstrate sound judgment in regard to safety of self and others and adhere to safety regulations throughout the occupational therapy process as appropriate to the setting and scope of practice. This must include the ability to assess and monitor vital signs (e.g., blood pressure, heart rate, respiratory status, and temperature) to ensure that the client is stable for intervention.* |
| ***B.4.0.*** | ***SCREENING, EVALUATION, AND INTERVENTION PLAN The process of screening and evaluation as related to occupational performance and participation must be conducted under the supervision of and in cooperation with the occupational therapist and must be client centered; culturally relevant; and based on theoretical perspectives, models of practice, frames of reference, and available evidence. These processes must consider the needs of persons, groups, and populations.***  ***INTERVENTION AND IMPLEMENTATION The process of intervention to facilitate occupational performance and participation must be done under the supervision of and in cooperation with the occupational therapist and must be client centered, culturally relevant, reflective of current occupational therapy practice, and based on available evidence.  The program must facilitate development of the performance criteria listed below. The student will be able to:*** | |
| *B.4.1.* | *Therapeutic Use of Self* | *Demonstrate therapeutic use of self, including one’s personality, insights, perceptions, and judgments, as part of the therapeutic process in both individual and group interaction.* |
| *B.4.2.* | *Clinical Reasoning* | *Demonstrate clinical reasoning to address occupation-based interventions, client factors, performance patterns, and performance skills.* |
| *B.4.3.* | *Occupation-Based Interventions* | *Utilize clinical reasoning to facilitate occupation-based interventions that address client factors. This must include interventions focused on promotion, compensation, adaptation, and prevention.* |
| *B.4.4.* | *Standardized and Nonstandardized Screening and Assessment Tools* | *Contribute to the evaluation process of client(s)’ occupational performance, including an occupational profile, by administering standardized and nonstandardized screenings and assessment tools and collaborating in the development of occupation-based intervention plans and strategies.*  *Explain the importance of using psychometrically sound assessment tools when considering client needs, and cultural and contextual factors to deliver evidence-based intervention plans and strategies.*  *Intervention plans and strategies must be client centered, culturally relevant, reflective of current occupational therapy practice, and based on available evidence.* |
| *B.4.5.* | *Application of Assessment Tools and Interpretation of Results* | *(No related Standard)* |
| *B.4.6.* | *Reporting Data* | *Under the direction of an occupational therapist, collect, organize, and report on data for evaluation of client outcomes.* |
| *B.4.7.* | *Interpret Standardized Test Scores* | *(No related Standard)* |
| *B.4.8.* | *Interpret Evaluation Data* | *(No related Standard)* |
| *B.4.9.* | *Remediation and Compensation* | *Demonstrate an understanding of the intervention strategies that remediate and/or compensate for functional cognitive deficits, visual deficits, and psychosocial and behavioral health deficits that affect occupational performance.* |
| *B.4.10.* | *Provide Interventions and Procedures* | *Provide direct interventions and procedures to persons, groups, and populations to enhance safety, health and wellness, and performance in occupations.*  *This must include the ability to select and deliver occupations and activities, preparatory methods and tasks (including therapeutic exercise), education and training, and advocacy.* |
| *B.4.11.* | *Assistive Technologies and Devices* | *Explain the need for and demonstrate strategies with assistive technologies and devices (e.g., electronic aids to daily living, seating and positioning systems) used to enhance occupational performance and foster participation and well-being.* |
| *B.4.12.* | *Orthoses and Prosthetic Devices* | *Explain the need for orthotics, and design, fabricate, apply, fit, and train in orthoses and devices used to enhance occupational performance and participation.*  *Train in the safe and effective use of prosthetic devices.* |
| *B.4.13.* | *Functional Mobility* | *Provide training in techniques to enhance functional mobility, including physical transfers, wheelchair management, and mobility devices.* |
| *B.4.14.* | *Community Mobility* | *Provide training in techniques to enhance community mobility, and address transportation transitions, including driver rehabilitation and community access.* |
| *B.4.15.* | *Technology in Practice* | *Demonstrate knowledge of the use of technology in practice, which must include:*   * *Electronic documentation systems* * *Virtual environments* * *Telehealth technology* |
| *B.4.16.* | *Dysphagia and Feeding Disorders* | *Demonstrate interventions that address dysphagia and disorders of feeding and eating, and train others in precautions and techniques while considering client and contextual factors.* |
| *B.4.17.* | *Superficial Thermal, Deep Thermal, and Electrotherapeutic Agents and Mechanical Devices* | *Define the safe and effective application of superficial thermal agents, deep thermal agents, electrotherapeutic agents, and mechanical devices as a preparatory measure to improve occupational performance. This must include indications, contraindications, and precautions.* |
| *B.4.18.* | *Grade and Adapt Processes or Environments* | *Assess, grade, and modify the way persons, groups, and populations perform occupations and activities by adapting processes, modifying environments, and applying ergonomic principles to reflect the changing needs of the client, sociocultural context, and technological advances.* |
| *B.4.19.* | *Consultative Process* | *Engage in the consultative process with persons, groups, programs, organizations, or communities in collaboration with inter- and intraprofessional colleagues.* |
| *B.4.20.* | *Care Coordination, Case Management, and Transition Services* | *Demonstrate, evaluate, and plan care coordination and case management. Understand and articulatetransition services in traditional and emerging practice environments.* |
| *B.4.21.* | *Teaching–Learning Process and Health Literacy* | *Demonstrate the principles of the teaching–learning process using educational methods and health literacy education approaches:*   * *To design activities and clinical training for persons, groups, and populations.* * *To instruct and train the client, caregiver, family, significant others, and communities at the level of the audience.* |
| *B.4.22.* | *Need for Continued or Modified Intervention* | *Monitor and reassess, in collaboration with the client, caregiver, family, and significant others, the effect of occupational therapy intervention and the need for continued or modified intervention, and communicate the identified needs to the occupational therapist.* |
| *B.4.23.* | *Effective Communication* | *Identify occupational needs through effective communication with patients, families, communities, and members of the interprofessional team in a responsive and responsible manner that supports a team approach to the promotion of health and wellness.* |
| *B.4.24.* | *Effective Intraprofessional Collaboration* | *Demonstrate effective intraprofessional OT/OTA collaboration to explain the role of the occupational therapy assistant and occupational therapist in the screening and evaluation process.* |
| *B.4.25.* | *Principles of Interprofessional Team Dynamics* | *Demonstrate awareness of the principles of interprofessional team dynamics to perform effectively in different team roles to plan, deliver, and evaluate patient- and population-centered care as well as population health programs and policies that are safe, timely, efficient, effective, and equitable.* |
| *B.4.26.* | *Referral to Specialists* | *Identify and communicate to the occupational therapist the need to refer to specialists both internal and external to the profession, including community agencies.* |
| *B.4.27.* | *Community and Primary Care Programs* | *Identify and communicate to the occupational therapist the need to design community and primary care programs to support occupational performance for persons, groups, and populations.* |
| *B.4.28.* | *Plan for Discharge* | *Implement a discharge plan from occupational therapy services that was developed by the occupational therapist in collaboration with the client and members of the interprofessional team by reviewing the needs of the client, caregiver, family, and significant others; available resources; and discharge environment.* |
| *B.4.29.* | *Reimbursement Systems and Documentation* | *Demonstrate knowledge of various reimbursement systems and funding mechanisms (e.g., federal, state, third party, private payer), treatment/diagnosis codes (e.g., CPT®, ICD, DSM® codes), and coding and documentation requirements that affect consumers and the practice of occupational therapy.*  *Documentation must effectively communicate the need and rationale for occupational therapy services.* |
| ***B.5.0.*** | ***CONTEXT OF SERVICE DELIVERY, LEADERSHIP, AND MANAGEMENT OF OCCUPATIONAL THERAPY SERVICES  Context of service delivery includes knowledge and understanding of the various contexts, such as professional, social, cultural, political, economic, and ecological, in which occupational therapy services are provided.   Management and leadership skills of occupational therapy services include the application of principles of management and systems in the provision of occupational therapy services to persons, groups, populations, and organizations.   The program must facilitate development of the performance criteria listed below. The student will:*** | |
| *B.5.1.* | *Factors, Policy Issues, and Social Systems* | *Identify and explain the contextual factors; current policy issues; and socioeconomic, political, geographic, and demographic factors on the delivery of occupational therapy services for persons, groups, and populations to promote policy development and social systems as they relate to the practice of occupational therapy.* |
| *B.5.2.* | *Advocacy* | *Explain the role and responsibility of the practitioner to advocate for changes in service delivery policies, effect changes in the system, recognize opportunities in emerging practice areas, and advocate for opportunities to expand the occupational therapy assistant’s role.* |
| *B.5.3.* | *Business Aspects of Practice* | *Explain the business aspects of practice including, but not limited to, the development of business plans, financial management, program evaluation models, and strategic planning.* |
| *B.5.4.* | *Systems and Structures That Create Legislation* | *Identify the systems and structures that create federal and state legislation and regulations, and their implications and effects on persons, groups, and populations, as well as practice.* |
| *B.5.5.* | *Requirements for Credentialing and Licensure* | *Provide care and programs that demonstrate knowledge of applicable national requirements for credentialing and requirements for licensure, certification, or registration consistent with federal and state laws.* |
| *B.5.6.* | *Market the Delivery of Services* | *Identify the need and demonstrate the ability to participate in the development, marketing, and management of service delivery options.* |
| *B.5.7.* | *Quality Management and Improvement* | *Identify the need for and evaluate processes for quality management and improvement (e.g., outcome studies analysis and client engagement surveys) and implement program changes as needed to demonstrate quality of services.* |
| *B.5.8.* | *Supervision of Personnel* | *Develop strategies for effective, competency-based legal and ethical supervision of occupational therapy assistants and non-occupational therapy personnel.* |
| ***B.6.0.*** | ***SCHOLARSHIP   Promotion of science and scholarly endeavors will serve to describe and interpret the scope of the profession, build research capacity, establish new knowledge, and interpret and apply this knowledge to practice. The program must facilitate development of the performance criteria listed below. The student will be able to:*** | |
| *B.6.1.* | *Scholarly Study* | * *Locate and demonstrate understanding of professional literature, including the quality of the source of information, to make evidence-based practice decisions in collaboration with the occupational therapist.* * *Explain how scholarly activities and literature contribute to the development of the profession.* |
| *B.6.2.* | *Quantitative and Qualitative Methods* | *Understand the use of quantitative and qualitative methods for data analysis that include:*   * *Basic descriptive, correlational, and inferential quantitative statistics.* * *Analysis and synthesis of qualitative data.* |
| *B.6.3.* | *Scholarly Reports* | *Demonstrate the skills to understand a scholarly report.* |
| *B.6.4.* | *Locating and Securing Grants* | *(No related Standard)* |
| *B.6.5.* | *Ethical Policies and Procedures for Research* | *(No related Standard)* |
| *B.6.6.* | *Preparation for Work in an Academic Setting* | *Understand the principles of instructional design and teaching and learning in preparation for work in an academic setting.* |
| ***B.7.0.*** | ***PROFESSIONAL ETHICS, VALUES, AND RESPONSIBILITIES   Professional ethics, values, and responsibilities include an understanding and appreciation of ethics and values of the profession of occupational therapy. Professional behaviors include the ability to advocate for social responsibility and equitable services to support health equity and address social determinants of health; commit to engaging in lifelong learning; and evaluate the outcome of services, which include client engagement, judicious health care utilization, and population health. The program must facilitate development of the performance criteria listed below. The student will be able to:*** | |
| *B.7.1.* | *Ethical Decision Making* | *Demonstrate knowledge of the American Occupational Therapy Association (AOTA) Occupational Therapy Code of Ethics and AOTA Standards of Practice and use them as a guide for ethical decision making in professional interactions, client interventions, employment settings, and when confronted with personal and organizational ethical conflicts.* |
| *B.7.2.* | *Professional Engagement* | *Demonstrate knowledge of how the role of a professional is enhanced by participating and engaging in local, national, and international leadership positions in organizations or agencies.* |
| *B.7.3.* | *Promote Occupational Therapy* | *Promote occupational therapy by educating other professionals, service providers, consumers, third-party payers, regulatory bodies, and the public.* |
| *B.7.4.* | *Ongoing Professional Development* | *Identify and develop strategies for ongoing professional development to ensure that practice is consistent with current and accepted standards.* |
| *B.7.5.* | *Personal and Professional Responsibilities* | *Demonstrate knowledge of personal and professional responsibilities related to:*   * *Liability issues under current models of service provision.* * *Varied roles of the occupational therapy assistant providing service on a contractual basis.* |

**OTA BACCALAUREATE-DEGREE-LEVEL STANDARDS SECTION C: FIELDWORK EDUCATION**

For each Standard, provide a narrative response that addresses the program’s planned compliance with that Standard and prepare the documents in the “Instructions” sections. Programs will be requested to add all narrative statements to ACOTE Online (<https://acote.aota.org>) and upload all requested documentation.

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|  |  | *SECTION C: FIELDWORK EDUCATION* |
| *C.1.0.* | *FIELDWORK EDUCATION  Fieldwork education is a crucial part of professional preparation and is best integrated as a component of the curriculum design. The fieldwork experience is designed to promote clinical reasoning and reflective practice, transmit the values and beliefs that enable ethical practice, and develop professionalism and competence in career responsibilities. Fieldwork experiences should be implemented and evaluated for their effectiveness by the educational institution. The experience should provide the student with the opportunity to carry out professional responsibilities under the supervision of qualified personnel serving as a role model. The academic fieldwork coordinator is responsible for the program’s compliance with fieldwork education requirements. The academic fieldwork coordinator will:* | |
| *C.1.1.* | *Fieldwork Program Reflects the Curriculum Design Ensure that the fieldwork program reflects the sequence and scope of content in the curriculum design, in collaboration with faculty, so that fieldwork experiences in traditional, nontraditional, and emerging settings strengthen the ties between didactic and fieldwork education.* | |
| Narrative Response: |  | |
| Instructions: | Provide a detailed description relating how Level I and II fieldwork will be integrated into the total curriculum. Describe a plan (activities/timelines) for securing agreement with fieldwork sites that reflect themes of the curriculum design and realities of the healthcare environment affecting the program. | |
| *C.1.5.* | *Sufficient Fieldwork Agreements  Ensure that fieldwork agreements are sufficient in scope and number to allow completion of graduation requirements in a timely manner, in accordance with the policy adopted by the program as required by Standard A.4.7.* | |
| Narrative Response: |  | |
| Instructions: | Provide a list of fieldwork sites that have submitted a signed letter of intent and will accept fieldwork students from the program. The list must include the practice area(s) of each fieldwork site. At the candidacy application stage, each program\* is required to provide evidence of signed letters of intent from two Level II fieldwork sites for each student in a variety of settings consistent with the curriculum design. The signed letters of intent must include the timeframes for the student placements.  \*Existing OTA associate-degree programs transitioning to the baccalaureate level may provide a list of all active fieldwork sites (those with active signed contracts) in lieu of signed letters of intent and clearly explain in the narrative that signed contracts are in place for all sites listed. | |

**OTA BACCALAUREATE-DEGREE-LEVEL STANDARDS SECTION D:   
BACCALAUREATE PROJECT**

For each Standard, provide a narrative response that addresses the program’s planned compliance with that Standard and prepare the documents in the “Instructions” sections. Programs will be requested to add all narrative statements to ACOTE Online (<https://acote.aota.org>) and upload all requested documentation.

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|  |  | *SECTION D: BACCALAUREATE PROJECT* |
| *D.1.0.* | *BACCALAUREATE PROJECT  The goal of the baccalaureate project is to provide an in-depth experience in one or more of the following: clinical practice skills, administration, leadership, advocacy, and education.*  *The individual or group project allows student(s) to demonstrate application of knowledge gained. The baccalaureate project shall be an integral part of the program’s curriculum design.*  *The program will:* | |
| *D.1.1* | *Baccalaureate Project Reflects Curriculum Design*  *Ensure that the baccalaureate project reflects the sequence and scope of content in the curriculum design so the baccalaureate project can allow for development of in-depth knowledge in the designated area of interest.* | |
| Narrative Response: |  | |
| Instructions: | Provide a detailed description relating how the baccalaureate project will be integrated into the curriculum to allow for the development of in-depth knowledge in a designated area of interest. | |
| *D.1.2* | *Design of Baccalaureate Project Ensure that the baccalaureate project is designed through collaboration of the faculty and the student(s), including individualized specific objectives.* | |
| Narrative Response: |  | |
| Instructions: | Provide a detailed description of how the baccalaureate project will be designed through the collaboration of the faculty and student(s). | |

**FINANCIAL RESOURCES**

***(Prepare this form, including categories as they are stated in your institution. Please note whether the institution prepares multi-year budgets. If you have no indication of the budget for the next year, please state that.)***

**1. Indicate fiscal year (e.g., October-September)**

1. **Obtain or develop a three-year budget utilizing categories appropriate to the program.**

|  |  |  |  |
| --- | --- | --- | --- |
| **Budget Categories** | **Previous Year** | **Present Year** | **Next Year (est.)** |
|  | **FY:** | **FY:** | **FY:** |
| **Faculty Salaries and Benefits** |  |  |  |
| **Other Salaries and Benefits** |  |  |  |
| **Supplies** |  |  |  |
| **Travel for Fieldwork Coordinator** |  |  |  |
| **Travel for Continuing Education** |  |  |  |
| **Purchased Services** |  |  |  |
| **Equipment** |  |  |  |
| **Library Resources** |  |  |  |
| **Instructional Aids** |  |  |  |
| **Technology** |  |  |  |
| **Other funds\* to which the program has access** |  |  |  |
| **\*(Specify how such funds are used)** |  |  |  |
| **TOTAL** |  |  |  |
| **% Institutional Funds** |  |  |  |
| **% Restricted Use Funds (i.e., grants, special program funds)** |  |  |  |

**PROGRAM STRATEGIC PLAN**

*(Program Title)*

*(College/University Name)*

Years: \_\_\_\_\_\_\_\_\_\_\_\_

Analysis of program evaluation, internal and external environments:

|  |  |  |  |
| --- | --- | --- | --- |
|  | Program Evaluation Results | Internal Institutional Environment | External Environment |
| Strengths |  |  |  |
| Weaknesses |  |  |  |
| Opportunities |  |  |  |
| Threats |  |  |  |

Institution’s Strategic Goal: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.

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| Long-Term Program Goal | Action Steps | Person(s) Responsible | Due Date for Action | Results / Update |
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Institution’s Strategic Goal: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.

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| Long-Term Program Goal | Action Steps | Person(s) Responsible | Due Date for Action | Results / Update |
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**FACULTY/PROGRAM DIRECTOR PROFESSIONAL DEVELOPMENT PLAN**

*(Completed forms must be signed by both parties in order to be considered valid.)*

*(Program Title)*

*(College/University Name)*

Name: Title:

Number of Hours worked *(FTE equivalent)*: Number of Credits Taught *(per academic year)*:

Supervisor's Signature:

*(Signature required)* Date

Faculty/PD's Signature:

*(Signature required)* Date

Date Developed: Date Revised:

| Connection to Program’s Strategic Plan | Goals | Action Steps To Achieve Goal | Timeline | Outcomes/  Revisions/Results |
| --- | --- | --- | --- | --- |
|  |  |  |  |  |