

***American Board of Physical Therapy
Residency and Fellowship Education***



**APPLICATION FOR
REACCREDITATION OF
NON-CLINICAL
RESIDENCY AND FELLOWSHIP
PROGRAMS**

**American Physical Therapy Association
1111 North Fairfax Street
Alexandria, VA 22314-1488
resfel@apta.org / 703-706-3152
www.abptrfe.org**



Payment Form – Residency/Fellowship Program Reaccreditation 2016 Application Fee

You must complete this form and include check or credit card information with your completed application. The amount owed is dependent on the number of residents/fellows enrolled in the program. Please mail this form with your application fee to APTA, Residency/Fellowship Accreditation, 1111 North Fairfax Street, Alexandria, VA 22314-1488.

Name of Program: Education Leadership Institute (ELI) Fellowship
Name of Program Director: Libby J Ross, MA
Address: APTA, 1111 North Fairfax Street, Alexandria, VA 22314
Phone Number: 703-706-3326
E-mail Address: libbyross@apta.org

Reaccreditation Fee (Please select one of the following):

**please note that starting in 2016, the cost of a single site visit has been incorporated into the reaccreditation fee rather than invoicing the program separately for these fees after the site visit.*

- 1 to 5 Participants (\$3645.75)
 6 to 10 Participants (\$4261.00)
 11+ Participants (\$4876.25)

Please make all checks payable to APTA. Please indicate the program name and “Residency/Fellowship Reaccreditation Application Fee” on the check.

MasterCard Visa American Express Discover Check Money Order

Card Number: _____ Expiration Date: _____ Security Code: _____

Signature: _____ Date: _____

Cardholder's Name: _____

Cardholder's Billing Address: _____

For Office Use Only:
POST TO FY2016: Program 62, Activity 3, Revenue 435

APPLICATION FOR REACCREDITATION OF A NON-CLINICAL PHYSICAL THERAPY RESIDENCY OR FELLOWSHIP EDUCATION PROGRAM

INTRODUCTION

Thank you for your continued commitment to the advancement of the physical therapy profession through postprofessional residency and Fellowship education.

This document should be reviewed along with the American Board of Physical Therapy Residency and Fellowship Education (ABPTRFE) “Evaluative Criteria for Accreditation of Non-Clinical Residency and Fellowship Programs for Physical Therapists”. In addition, please review the ABPTRFE Rules of Practice and Procedure to ensure that your program is operating in accordance with current policies.

Additionally, ABPTRFE has compiled the Application Resource Manual to serve as a guide as you prepare your documents for reaccreditation. These real examples were provided by APTA accredited programs and are not intended to be prescriptive, as every program is unique and its individuality should be reflected in the application.

All documents referenced above are located in the Application Resources section of on the ABPTRFE website.

Please retain this application information for reference throughout the application process and future accreditation period. Replace with most current edition, as they are made available.

Residency and Fellowship Program Accreditation Application for Reaccreditation Instructions

The application for candidacy is based on the “Evaluative Criteria for Accreditation of Non-Clinical Residency and Fellowship Programs for Physical Therapists”. For each Evidence, provide a brief description of how the program meets the evaluative criteria and the documentation or materials as requested in the “Evaluative Criteria for Accreditation of Non-Clinical Residency and Fellowship Programs for Physical Therapists”.

Compilation of Application

The materials must be provided in *hard copy*. Please submit five (5) copies of the complete application in *separate 3-ring binders*. Materials should be collated and may be printed on front and back of the paper to limit weight. Please type your program’s responses directly into the application. You may cut and paste additional materials into the appropriate Evidence numbers.

**Please note, APTA will accept an electronic submission of the application in lieu of hard copies provided 1) the program creates a single, comprehensive document within a portable document format (PDF); and 2) the PDF file is bookmarked delineating each Evidence statement for easy review and maneuverability of the application. Electronic application submissions will not be accepted if these 2 conditions are not met.*

Application Fee

Application fees are determined by the anticipated number of residents/fellows that will be enrolled in the program per the information provided on the “*ABPTRFE – Program Data for Residency or Fellowship Program Accreditation*”. Please complete the enclosed application payment form and mail the non-refundable application fee at the time that the application is submitted to prevent processing delays. All fees must be received before the application will be reviewed.

Submission of the Application and Fee

The application fee and a total of **five (5)** copies of the compiled application in 3-ring binders should be mailed to APTA, Residency/Fellowship Accreditation, 1111 North Fairfax Street, Alexandria, VA 22314-1488. Please include the “Payment Form” located on the APTA website with the application fee.

**Please note that starting January 1, the version of the application that must be submitted is the one for that respective year. If the previous year’s application is utilized after January 1, the program will be notified that they must revise and resubmit the application using the current year’s application. This may result in a delay of the accreditation process.*

Please direct questions regarding the application process to the APTA Residency/Fellowship staff at 703.706.3152 or via e-mail at resfel@apta.org.

ABPTRFE – Program Data for Residency or Fellowship Program Accreditation

NAME OF PROGRAM Education Leadership Institute (ELI) Fellowship			
NAME OF SPONSORING ORGANIZATION American Physical Therapy Association *if the program has more than one sponsoring organization, attach a copy of the contractual agreement between the organizations that outlines equal responsibility and ownership for the program			
PROGRAM ADDRESS (If changed from program's application for recognition of a developing program)	LINE 1		
	LINE 2		
	CITY	STATE	ZIP CODE
	WEBSITE (if available) http://www.apta.org/ELI/		
PROGRAM DIRECTOR (If different from program's application for recognition of a developing program)			
NAME (last) Ross		(first) Elisabeth "Libby"	(middle initial) J
CREDENTIALS (i.e. PT, DPT, OCS, etc.) MA	TELEPHONE 703-706-3326	FAX	E-MAIL libbyross@apta.org
WEBSITE DIRECTORY CONTACT (if different from Program Director AND if changed from application for recognition of a developing program)			
NAME (last) Ross		(first) Elisabeth "Libby"	(middle initial) J
CREDENTIALS (i.e. PT, DPT, OCS, etc.) MA	TELEPHONE 703-706-3326	FAX	E-MAIL libbyross@apta.org
PROGRAM INFORMATION			
LENGTH OF PROGRAM 12 months hours	RESIDENT/FELLOW TUITION/FEE? <input type="checkbox"/> NO <input checked="" type="checkbox"/> YES AMOUNT \$ 6,000 <i>*please include fees associated with books, coursework, insurance, etc. (if applicable)</i>		
PROGRAM FORMAT <input type="checkbox"/> Full-time <input checked="" type="checkbox"/> Part-time <input type="checkbox"/> Both	ANTICIPATED NUMBER OF PARTICIPANTS PROGRAM WILL ACCEPT EACH YEAR 18		
PLEASE IDENTIFY THE PROGRAM'S STRUCTURE BY IDENTIFYING IT AS EITHER A SINGLE-SITE, MULTI-SITE, OR MULTI-FACILITY PROGRAM BASED ON THE DEFINITIONS PROVIDED IN THE ABPTRFE ACCREDITATION HANDBOOK: <input checked="" type="checkbox"/> SINGLE <input type="checkbox"/> MULTI-SITE <input type="checkbox"/> MULTI-FACILITY			
COMPENSATION TO RESIDENT/FELLOW? <input checked="" type="checkbox"/> NO <input type="checkbox"/> YES			
Please indicate what the percent of this salary is compared to a regular employee at your facility (ex: 100%, 75%, 60% of a regular employee's salary): Not applicable			
How many hours per week does the resident/fellow spend in clinical practice? Not applicable			
BENEFITS PROVIDED TO RESIDENT/FELLOW <input checked="" type="checkbox"/> None <input type="checkbox"/> Full-time employee <input type="checkbox"/> Part-time employee <input type="checkbox"/> Other: please list		IS YOUR PROGRAM ASSOCIATED WITH EARNING A DEGREE? <input checked="" type="checkbox"/> No <input type="checkbox"/> Degree earned:	

**AMERICAN PHYSICAL THERAPY ASSOCIATION (APTA)
Residency/Fellowship Program Agreement**

The American Physical Therapy Association (APTA) through the American Board of Physical Therapy Residency and Fellowship Education (ABPTRFE) accredits residency and fellowship programs. The program (“You”) has applied for candidacy. In consideration of ABPTRFE’s review of the application, you hereby agree as follows:

1. You will furnish complete and accurate information to ABPTRFE, and will work cooperatively with it in connection with its review of your application and its monitoring of compliance with your obligations.
2. You recognize that a participant who enrolls in a program prior to ABPTRFE’s granting it candidate status will not be deemed to have graduated from an APTA-accredited program even if ABPTRFE accredits the program before he/she graduates from the program.
3. Your program will comply with the ABPTRFE Rules of Practice and Procedure.
4. You will comply with APTA’s policies and positions. You will not place any resident/fellow in a clinical education experience where the clinic is in a referral for profit situation, that is, one in which a referring physician (medical doctor, doctor of osteopathy, podiatrist, dentist, or chiropractor) derives a financial benefit from the physical therapy services provided to the person who is referred. The situations to which this restriction applies include those in which: (a) the physician has an ownership interest in a physical therapy practice to which he or she refers, (b) the physician or the physician’s practice employs or contracts with physical therapists to provide physical therapy services within the physician practice, or (c) the physician’s income or bonus is directly or indirectly tied to the revenues of the physical therapy service to which he or she refers patients.
5. You will conduct your operations and program in an ethical manner.
6. If APTA, in good faith, institutes any legal action against you on account of any violation of this Agreement, you will indemnify APTA, to the maximum extent permitted by law, for all its expenses of preparing for, instituting, prosecuting, and/or settling such an action. If you are a governmental institution/organization, this section does not apply.

If ABPTRFE grants you candidate status, you further agree that:

7. You will fund expenses of any site visit in accordance with the ABPTRFE Rules of Practice and Procedure.
8. You will be enrolled in RF-PTCAS and you will use it as the program’s sole admission process for applicants to your program.
9. In the course of promoting your program, you will provide complete and accurate information about your program, services, and fees. As a candidate for accreditation you will not claim or imply that you are an accredited residency or fellowship program. You may publicize your program as a candidate program only in accordance with the ABPTRFE Rules of Practice and Procedure.

If ABPTRFE accredits you, you further agree that:

10. In the course of promoting your program, you will provide complete and accurate information about your program, services, and fees. You may publicize your program as an accredited program only in accordance with the ABPTRFE Rules of Practice and Procedure.
11. Your program will remain in substantial compliance with the Evaluative Criteria for Accreditation of Non-Clinical Residency and Fellowship Programs for Physical Therapists.
12. You will file an annual report, furnish requested information, and pay fees per the ABPTRFE Rules of Practice and Procedure.
13. You agree that noncompliance with this Agreement constitutes grounds for withdrawal of accreditation.

Education Leadership Institute (ELI) Fellowship

(Name of Program) hereby agrees with all foregoing terms and conditions.

Libby Ross, Director of Academic Services
Program Director Name & Title (Print/Type)



8/12/2016

Program Director Signature Date

Bill Boissonnault, EVP of Professional Affairs
Organization Administrator Name & Title (Print/Type)



8/12/2016

Organization Administrator Signature Date

PREFACE

Please summarize the successes and failures of the program throughout the recent accreditation process. Please include the rationale for the format of the program (single-site, multi-facility, multi-site). This overview should serve as an introduction to the application. Please limit the Preface to two (2) pages.

The Education Leadership Institute (ELI) Fellowship is a yearlong blended learning (online and onsite) program with curricular content that addresses the current and future needs of the profession and the professions' educational community. Acceptance into this program is by application, requires the support of the academic institution, and is intended for novice (0-7 years) and emerging academic administrators. The ELI Fellowship is designed for fellows-in-training to connect theory with practice and enable direct application of knowledge learned through the Fellowship to everyday work in physical therapy education and performance. In addition, the Fellowship provides mentoring by high quality, experienced academic administrators, teaching by highly qualified faculty, and peer networking to facilitate the development of future mentors and leaders. ELI has successfully graduated a total of 73 fellows to date. Eighteen (18) applicants were accepted into the 2016-2017 cohort. ELI can accept a maximum of 18 fellows-in-training annually.

Overview: Components of the APTA Education Leadership Institute:

- Program Orientation: ELI is launched with a 2-hour virtual orientation webinar (camera/audio) in July and includes mentors, fellows-in-training, program director, ELI Work Group members, and a closing inspirational speaker. During the first hour, fellows-in-training meet virtually with their assigned ELI mentorship group (blue, green, or orange) comprised of 2 mentors and 4-6 fellows-in-training. During the second hour, the entire cohort comes together for an overview of the role and responsibilities of everyone involved in ELI key program technologies, including the APTA Learning Center, community Hub, and Adobe WebEx. (**Appendix A: ELI Orientation**)
- Curriculum Content: Nine online modules are provided through the APTA Learning Center by recognized by the ELI Work Group as content experts who serve as program faculty. The modules address the breadth and depth of knowledge required to function in the role of program director and leadership within higher education with 404 instructional hours and 119 mentoring hours for a total of 523 hours in the program. (**Appendix B: Resources Modules 1-9**)
- Mentorship: Six highly experienced PT and PTA program directors who meet established criteria as recognized leaders within their academic institution, physical therapy education, and the profession function as program mentors throughout the yearlong program. Mentors, assigned in pairs, provide participant mentorship in 3 subgroups (blue, green, and orange) with 2 mentors assigned to a maximum of 6 fellows-in-training. (**Appendix C: Mentorship Guide**)
- Face-to-Face (Onsite) Sessions: Three, 2-day, face-to-face sessions are provided in October, March, and July based on a developmental integrative curriculum that enables fellows-in-training to clarify and pose questions of faculty related to the modules, receive focused mentoring to integrate the curricular content of ELI through peer-reviewed case vignettes and real-life situations, refine and enhance leadership development plans, explore and advance leadership development projects, and engage in an open environment that facilitates a strong leadership community. (**Appendix D: Onsite Agendas**)
- Leadership Reflections Worksheet: Participants ongoing assessment to refine and enhance a personal leadership development plan to advance their knowledge, abilities, and skills within their academic institution and higher education. The Bolman and Deal (2008) theoretical framework - or the Four Frames Approach - is the basis for ELI's collaborative exploration of personal leadership and is applied throughout the entire Fellowship. The program also explores other contemporary leadership

theories. Fellows determine which theories are relevant to their personal leadership journey. The leadership development plan document was revised significantly in 2012 based on feedback from ELI graduates and is now known as the Leadership Development Reflections Worksheet. It engages fellows-in-training in ongoing reflection and is updated and discussed during each onsite session.

(Appendix E: ELI Leadership Development Reflections Worksheet)

- **Outcome-Learning Project:** Based on a problem or situation within the participant's academic institution, the applicant initially identifies a project topic during the application process that directly benefits the sponsoring institution. Throughout the program these projects are further developed and refined with feedback from peers, mentors, and institutional supervisors. These projects are fully defined by the end of ELI; however, projects may not be completed as some may extend past the end of the Fellowship. **(Appendix F: Leadership Project Outline)**
- **Assessments:** ELI includes a variety of assessments that relate to the various components to include the application process and information provided about the program, online course assessments (content, delivery, faculty), participant and mentor assessments, program assessment for the graduate and nominee/supervisor, program assessment for the participant and nominee/supervisor 1 and 3 years post program completion, and face-to face feedback about any aspect of the program during the onsite sessions from participants, mentors, and faculty. **(Appendix G: Assessment Forms)**

Single-site Justification: The program is delivered primarily online via the APTA Learning Center and Adobe WebEx. While the location of the 3 onsite sessions varies by cohort and year, the Fellowship should be considered a single-site location because the fellows-in-training meet with the same set of mentors and mentorship groups throughout the virtual and onsite components of the program.

Program Improvements: Program assessments over the first 5 years indicated that ELI Fellows were having a leadership impact on their programs and institutions; however, this impact was to a lesser degree within the physical therapy profession. Minor changes were recommended by the ELI Work Group within the onsite session curriculum to emphasize leadership opportunities within the profession at local, state, and national levels. This aspect was highlighted and discussed during the 2015 ELI Networking Breakfast at ELC with the APTA President. A committee of ELI Fellow volunteers was formed to explore mechanisms to advance leadership within education (specifically ACAPT) and profession. In 2012, ELI participants began to be referred to as fellows-in-training since the program had achieved Fellowship status and based on the request of the enrollees at that time.

Research Program Surveys: The system used to collect survey data from the ELI Fellows and their supervisors is reviewed by the ELI Work Group during its annual meeting in August and was last updated in 2015. The APTA Research Department also conducted a comprehensive review of all ELI survey instruments in 2015 to ensure that instruments used were still necessary and designed to obtain the appropriate data needed to conduct learner, curriculum, and program assessments. As a result, several questions on the *Post Module Survey* (faculty), *Post Onsite Survey* (mentorship), *ELI Fellow New Graduate Survey*, 1 and 3 year post-survey, *ELI Supervisor New Graduate Survey*, and 1 year survey, were revised for clarity. Questions that were redundant based upon 4 years of responses were eliminated. The 5-year survey will be administered for the first time in September 2016 (2011 graduates) and was reduced to 9 questions to assess new responsibilities assumed in the graduate's academic program, higher education, and the profession; the ability to facilitate change in higher education and the profession; and the overall impact of ELI 5 years later. **(Appendix G: Assessment Forms)**

Mentor Feedback: Mentors meet informally at the end of each onsite session and in 2014 identified the need for more case vignettes and role plays, so they could choose those that were most relevant and appropriate for each cohort. In 2015, the ELI Work Group drafted new case vignettes and a role play that could be substituted for existing vignettes during the onsite session. These drafts were subsequently

reviewed by a group of ELI Fellows who provided feedback. The revised cases were reviewed again by the work group to create a final set that were first used during the second onsite session in 2016. There are currently 8 case vignettes and 3 role plays available. Additional edits will be considered by the ELI Work Group during its next meeting in August 2016. (**Appendix N: Case Vignettes**)

1.0 ORGANIZATION

Residency or Fellowship Sponsoring Organization

Evidence 1.1.1 Provide the statement of mission and goals of the sponsoring organization of the program. If the program has more than one sponsoring organization, provide the statement of mission and goals for all sponsoring organizations.

Below is a description of all ELI stakeholders and their relationship to the program.

- **APTA Board of Directors:** The development of an Education Leadership Institute was based on a comprehensive needs assessment conducted by the APTA Consultant Group on ELI in 2008 and was approved by the APTA Board of Directors in 2009 (**Appendix TT: Needs Assessment**). In 2010 the Board approved the purpose and member qualifications of the Education Leadership Institute Committee, later renamed the ELI Work Group in 2012. The APTA Board is responsible for ensuring that the program advances the strategic goals of the association and provides financial oversight of the program.
- **ELI Work Group** is responsible for the ongoing oversight and management, implementation, and evaluation of the program including the applicant review process; curriculum content and revision; selection of faculty, mentors, and facilitators/moderators; oversight of outcomes assessments; and, establishing and interpreting policies and procedures. Representation on the work group includes a program director from ACAPT, an Education Section member, an ELI Fellow graduate, a residency or fellowship program director, an external member with university wide senior leadership expertise, and a member with senior program director leadership experience. (**Appendix ZZ: Work Group Responsibilities**)
- **ELI Program Director** strategically leads and manages the Fellowship. Responsibilities include, but are not limited to, managing all aspects of the ELI Fellowship in coordination with the work group and ensuring the program's compliance with the provisions of the current version of the ABPTRFE Evaluative Criteria and Rules of Practice and Procedure. (**Appendix MM: Program Director**)
- **American Board of Physical Therapist Residency and Fellowship Education (ABPTRFE)** provides program oversight to ensure the continued credibility of ELI as an accredited fellowship.
- **ELI Faculty** are content experts who are responsible for reviewing module learning objectives, slides, references, assignments, readings, and posttest assessments. They engage fellows-in-training via an asynchronous discussion board and conduct 3 virtual office hours via webinar to pose and respond to questions, clarify information, discuss assignments, and promote reflective thinking and learning.
- **ELI Mentors** are physical therapists and physical therapist assistants recognized for their leadership in PT or PTA education. Mentors work in pairs and serve as the cohort facilitators and

guides. Mentors provide regular, timely, and close interaction with the fellows-in-training through coaching, advising, and thought-provoking questions on an individual level, as well as through their assigned small group during the Fellowship. (**Appendix QQ: Mentorship Guide**)

- **APTA Education Section** pays the full ELC registration fee for enrolled ELI fellows-in-training who are members of the Education Section and a partial registration for those who are not Education Section members as part of its support of the ELI Fellowship. The cost to the Section is estimated to be \$5130 (18 fellows x \$285 registration fee) for the 2016-2017 cohort. (**Appendix LL: Acceptance Letter**) The Education Section also reserves time on the ELC agenda for the ELI Networking Breakfast, selects the Education Section and PTA Educators SIG representatives to the ELI Work Group, and assists in the promotion of ELI to prospective candidates via an e-newsletter.
- **American Council of Academic Physical Therapists (ACAPT)** in conjunction with the Education Section, reserves time on the ELC agenda for the ELI Networking Breakfast, selects the ACAPT representative to the ELI Work Group, and assists in the promotion of ELI to prospective candidates via an e-newsletter.
- **Academic Institution:** It is the responsibility of the participant's institution or organization to provide Fellowship tuition and fee support to the ELI fellow-in-training, identify a primary mentor at the academic institution, and ensure the fellow completes the ELI leadership project, if it extends past the end of the one-year Fellowship. (**Appendix SS: ELI Nomination Form**)
- **ELI Fellows (Graduates)** are responsible for completion of the ELI Leadership Project, if not finalized at the time of graduation, and for responding to post-graduation surveys after 1, 3, and 5 years. Fellows may also be asked to provide ad hoc feedback to the ELI Work Group on selected components of the Fellowship and to help promote it to future ELI applicants.
- **ELI Fellows-in-Training:** These individuals must fulfill all required components of the Fellowship. (**Appendix S: Expectations**)

Vision Statement for the Physical Therapy Profession: Transforming society by optimizing movement to improve the human experience.

APTA Mission Statement: The mission of the American Physical Therapy Association (APTA), the principal membership organization representing and promoting the profession of physical therapy, is to further the profession's role in the prevention, diagnosis, and treatment of movement dysfunctions and the enhancement of the physical health and functional abilities of members of the public.

Goals in the APTA Strategic Plan: APTA's Board of Directors annually reviews and revises the goals, objectives, and strategies of the association. As of 2015, the association focused on 3 targeted areas: transforming society, transforming the profession, and transforming the association consistent with APTA's vision and mission.

1. **Transform Society:** Barriers to movement will be reduced at the population, community, workplace, home, and individual levels.

Objectives:

- Reform payment policy to reflect the essential role of physical therapists in movement, health and quality of life.

- Establish mutually beneficial partnerships to enhance society's understanding of physical therapists' movement expertise and remove barriers to movement.
 - Physical therapists will develop and implement community-based measures of mobility.
 - Improve society's recognition and understanding of physical therapy and physical therapists as movement system experts.
 - Leverage technology to advance physical therapists' role in enhancing movement.
2. **Transform the Profession:** Physical therapist practice will deliver value by utilizing evidence, best practice, and outcomes.

Objectives:

- Physical therapists demonstrate consistency in practice based on outcomes and evidence.
 - Physical therapists self-identify as movement system experts.
 - Ensure that physical therapist and physical therapist assistant education prepares practitioners for contemporary practice.
3. **Transform the Association:** APTA will be a relevant organization that is entrepreneurial, employing disciplined agility to achieve its priorities.

Objectives:

- Develop and refine data sources to drive business intelligence in the areas of public affairs, professional affairs, finance and business affairs, and member affairs.
- Identify the sources and users of physical therapy information in an effort to make APTA the definitive source of such information.
- Achieve a greater market share of membership.

The transformative aspirations in the APTA Strategic Plan require the support of rigorous educational foundations and strong leadership to ensure that the objectives associated with these goals can be achieved. The Fellowship's role in preparing leaders within the profession and higher education is an important vehicle that assists APTA in meeting the needs of society.

Evidence 1.1.2 Describe the sponsoring organization's ongoing methods used to evaluate the effectiveness of the sponsoring organization's performance. Include evidence of any external agency accreditations (eg, CAPTE or another educational accreditation organization if applicable). If the program has more than one sponsoring organization, provide this information for all sponsoring organizations.

APTA is a nonprofit organization with a vision, purpose, organizational values, and strategic goals and objectives that guide current and future directions and initiatives for the profession. The organization conducts an annual review of its strategic outcomes and objectives with periodic review and revision of its vision and mission, as appropriate. The association's strategic outcomes and objectives are evaluated quarterly in light of established metrics with a report to its leadership and membership. An [annual report](#) is made available to the association's leadership and membership that summarizes the work of the association, especially highlighting those key achievements that are associated with the strategic outcomes and objectives for the association.

Within the organization, there are components that are required to meet accreditation standards through external agencies to include International Association for Continuing Education and Training ([IACET](#)) to be able to award recognized continuing education offerings for CEUs, the Commission on Accreditation for Physical Therapy Education (CAPTE) that must meet accreditation standards for the US Department of Education ([USDE](#)) and the Council on Higher Education and Accreditation ([CHEA](#)), accounting

practices that undergo an annual audit and review of accounting procedures to meet IRS standards, and the American Board of Physical Therapy Specialties ([ABPTS](#)) that meets standards for acceptable testing in the industry.

The Education Leadership Institute Fellowship is managed by the ELI program director, who is Director of Academic Services in the Education Department of the Professional Affairs Unit at APTA. The ELI Fellowship became a stand-alone program within the APTA budget in 2015: Program 62 (Education), Activity 05 (ELI), so that related revenues and expenses could be more easily tracked. The ELI program director must provide the following documents relative to ELI to the APTA senior staff and Board of Directors as part of the annual budget review process: (1) work plan, (2) calendar, and (3) key performance indicators (KPIs) for the upcoming year.

- **WORK PLAN:** The APTA work plan template requires that staff identify the “Primary Strategic Plan Impact and Intended Audience” for each activity in the budget. ELI was identified as being aligned with APTA’s second strategic goal to “Transform the Profession, and Objective 3 to “Ensure that physical therapist and physical therapist assistant education prepares practitioners for contemporary practice.” It also requires a description of the ELI program; the planned activities to advance the strategic plan; the intended audiences for the program; and the coordination and collaboration required with other staff, members, and outside groups to manage the program.
- **CALENDAR:** The APTA calendar document requires the identification of significant milestones, deadlines, and events associated with the program, including start and end dates.
- **KNOWLEDGE PERFORMANCE INDICATORS (KPI):** The APTA KPI document requires staff to define the measure of the activity’s operational success and strategic success. It also requires staff to identify how the key performance indicators will be reported. Updates on performance are provided on a quarterly basis.

(Appendix J: Budget Review)

Residency or Fellowship Program

Evidence 1.2.1.A Provide the program’s mission statement, goals and objectives. Multi-site programs must include at least one goal and corresponding objectives addressing consistency of program delivery in all settings.

MISSION: The mission of the APTA Education Leadership Institute (ELI) Fellowship is to develop innovative and influential leaders in physical therapy (physical therapist and physical therapist assistant) education who can function within a changing politico-sociocultural environment. To achieve this mission the ELI Fellowship will be:

- Oriented toward leadership in the broadest context,
- Designed to meet contemporary education leadership needs with an eye toward the future,
- Provided across all levels of educators, not just program directors, including academic and clinician educators, and
- Targeted toward higher education culture.^{1 2}

GOALS: The Education Leadership Institute Fellowship will develop physical therapist and physical therapist assistant education program directors with the leadership skills to:

- Facilitate change and improvement in the academic environment of the 21st century.
- Think strategically and creatively to implement solutions in education that respond to the changes and contemporary context in health care and society.
- Engage in public discourse that advances the physical therapy profession.

PROGRAM OBJECTIVES: The Education Leadership Institute Fellowship will:

1. Advance knowledge, skills, and behaviors associated with leadership in higher education as applied to physical therapy in a yearlong program.
2. Apply leadership theoretical frameworks that incorporate concepts such as structural, human resource, symbolic, and political leadership.
3. Advance the learning project and the professional leadership development plan as a result of the application and integration of curricular content.
4. Develop, refine, and implement a learning project that is relevant to the needs of the fellow-in-training's academic institution and that facilitates the resolution of an issue/need within the supporting academic institution.
5. Involve the academic institution's leadership, including signed consent by the fellow-in-training's Dean/ supervisor, with the fellow-in-training's learning project throughout the Education Leadership Institute. This project may or may not be fully realized by the completion of the Institute and may continue beyond the year-long curriculum.
6. Develop and refine a professional leadership development plan, throughout the Education Leadership Institute, where the implementation of this plan will begin with the support of the academic institution and Education Leadership Institute mentors.
7. Complete self-assessments with respect to personal leadership.
8. Participate in course, program, and long-term professional evaluations to shape the continued enhancement of the Education Leadership Institute.
9. Develop a strong network among the cohort of fellows-in-training involved in the Education Leadership Institute.

Evidence 1.2.1.B Describe how the program's mission statement, goals, and objectives are consistent with one another.

The core philosophy of the program was identified in a 2010 report of the ELI Steering Committee to the APTA Board of Directors and provided the framework upon which the mission, goals, and objectives were developed. The philosophy is as follows:

The Education Leadership Institute will:

- Prepare physical therapist program directors and physical therapist assistant program directors to meet contemporary education leadership needs through strategic and forward thinking and by leading change in higher education.
- Affect not only new program directors and new faculty in the profession, but may also include clinicians (eg, clinical residency and fellowship leadership) interested in pursuing academic leadership positions.
- Be sufficiently broad to allow participants, regardless of their professional role, to benefit from leadership training and likewise be flexible enough to meet the tailored objectives and needs of the participant to facilitate application of the concepts learned to their specific contextual environments.

(Appendix YY: Report to APTA Board 2010)

This framework identifies both the target audience for this program and the breadth of the program's intent to prepare physical therapy (PT and PTA) program directors to meet contemporary education leadership needs through strategic and forward thinking and by leading change in the context of higher education.

The [mission](#) further explicates the core philosophy by describing that the program will develop innovative and influential leaders in physical therapy who can function within a changing politico-social-cultural environment within higher education to meet contemporary and future education leadership needs provided across all levels of academic and clinician educators.

The goals further describe 3 critical areas in which ELI will develop the leadership skills of core faculty and program directors to include: 1) the ability to facilitate changes and improvement in the academic environment in the 21st century, 2) think strategically to creatively implement solutions in education to respond to changes in health care and society, and 3) to engage in public discourse that advances the physical therapy profession.

The ELI Fellowship mission, goals, and objectives drive the structure of the program and its curriculum that include the following:

- Comprehensive curriculum
- Mentorship
- Ongoing leader development reflection,
- Institutional leadership project supported by the fellow-in-training's organization
- Networking in a shared fellow-in-training and mentor community
- Development of future mentors.

Evidence 1.2.1.C Describe how the program's mission, goals, and objectives are consistent with the mission of the sponsoring organization(s).

ELI's program mission, goals, and objectives are consistent with the mission of the APTA given the need to develop future leaders in practice, education, research, and for the association. The APTA mission "...is to further the profession's role in the prevention, diagnosis, and treatment of movement dysfunctions and the enhancement of the physical health and functional abilities of members of the public." ELI contributes to the APTA mission by developing leaders in academia who are better able to advance physical therapy education and produce graduates with the knowledge, skills, and behaviors needed to improve patient care outcomes in an evolving health care system.

The third objective of the "Transforming Profession" goal of APTA states: "**Ensure that physical therapist and physical therapist assistant education prepares practitioners for contemporary practice**". To prepare future doctors of physical therapy and physical therapist assistants to meet the needs of society in contemporary and future healthcare, individuals leading these education programs must possess the necessary knowledge, skills, abilities, and professional behaviors, to capably lead and manage these programs within the context of higher education, healthcare, and society. The Education Leadership Institute Fellowship provides a comprehensive and intensive educational experience that prepares novice and emerging leaders in physical therapy education for the various roles and responsibilities that must be assumed within higher education.

Additional support for APTA's commitment to leadership as an inherent part of its mission is evidenced by [leadership development](#) opportunities provided to the Board of Directors and component leaders to

facilitate a better understanding of how to manage their roles and responsibilities within the association and to assume leadership within their respective domains.

Furthermore, the 2015 report of the APTA Excellence in Physical Therapist Education Task Force resulted in multiple actions by Board of Directors intended to enhance the ability of physical therapist education to produce practitioners that meet the needs of the current and evolving health care system. ELI develops education leaders who are better equipped to address the Board's goals relative to professional education and implement substantive change at the institution and for the profession. (**Appendix K: Excellence in Physical Therapist Education Task Force**)

Evidence 1.2.1.D Provide the participant's goals with corresponding objectives.

PARTICIPANT LEARNING OBJECTIVES: Specific learning outcomes for ELI fellows-in-training:

The goals of the fellow are to:

- Advance knowledge, skills, and behaviors associated with leadership in higher education as applied to physical therapy in a yearlong program.
- Apply leadership theoretical frameworks that incorporate concepts such as structural, human resource, symbolic, and political leadership.
- Advocate implementation of the learning project and the professional leadership development plan as a result of the application and integration of curricular content.
- Develop, refine, and implement a learning project that is relevant to the needs of the fellow-in-training's academic institution and that facilitates the resolution of an issue/need within the supporting academic institution. This project may or may not be fully realized by the completion of the Fellowship and may continue beyond the yearlong curriculum.
- Develop and refine a professional leadership development plan, throughout the Education Leadership Institute, where the implementation of this plan will begin with the support of the academic institution and ELI Fellowship mentors.
- Participate in self and peer assessments, module, mentor, program, and long-term professional evaluations to shape the continued enhancement of the Education Leadership Institute.
- Develop a strong network among the cohort of fellows-in-training involved in the ELI fellowship.

1. Goal: Advance knowledge, skills, and behaviors associated with leadership in higher education as applied to physical therapy in a yearlong program.

Objectives:

- a. Complete a total of 9 online learning modules provided through the APTA Learning Center to include: completion of assigned reading, journaling activities, reflective thinking, directed assignments, and response to discussion forum questions.
- b. Complete a posttest assessment for each module of the curriculum with a score of 70% or higher.
- c. Complete a standardized postcourse evaluation, as required by the Learning Center of all enrollees seeking to earn continuing education units (CEUs) from APTA following the completion of an online course.
- d. Following the completion of the corresponding ELI onsite session for the module block (1-3, 4-6, and 7-9), complete an ELI module-specific evaluation that provides feedback about the module content, delivery, time for completion, and additional comments.

(Appendix G Assessment Forms)

2. Goal: Apply leadership theoretical frameworks that incorporate concepts such as structural, human resource, symbolic, and political leadership.

Objectives:

- a. Review different leadership frameworks and their application to higher education, health care, and other environments.
- b. Discuss the theoretical framework of Bolman and Deal and its application within higher education.
- c. Complete Bolman and Deal's self-assessment to identify preferred leadership styles and provide peer assessment to ELI fellows-in-training about their leadership approaches.
- d. Identify leadership strengths and weaknesses for further development when refining the fellow-in-training's leadership development plan.
- e. Apply Bolman and Deal leadership framework to the management of peer-reviewed case vignettes and fellow-in-training's real life situations within the mentorship subgroups.
(Appendix M: Bolman and Deal Instrument)

3. Goal: Advance the learning project and the professional leadership development plan as a result of the application and integration of curricular content.

Objectives:

- a. Apply concepts learned about leadership in the 9 online modules to the fellow's professional leadership development plan within the context of higher education, health care, society, and the profession.
- b. Refine the leadership development plan based on journal activities and discussions with faculty and peers.
- c. Analyze concepts from the theoretical framework of Bolman and Deal as applied to peer-reviewed case vignettes and fellow-in-training's real life situations.
(Appendix N: Case Vignettes)

4. Goal: Develop, refine, and implement a learning project that is relevant to the needs of the fellow's academic institution and that facilitates the resolution of an issue/need within the supporting academic institution. This project may or may not be fully realized by the completion of the Fellowship and may continue beyond the year-long curriculum.

Objectives:

- a. Identify a potential learning project as a part of the application process to facilitate the resolution of an organizational issue/need.
- b. Discuss the potential learning project with the applicant's supporting dean/supervisor nominee from their institution/organization in preparing application submission materials.
- c. Develop and refine the learning project concept throughout ELI using a defined outline to include the components as follows:
 - 1) Project title
 - 2) Project background
 - 3) Project outcomes

- 4) Potential challenges and opportunities
- 5) Resources
- 6) Strategies
- 7) Analysis/assessment of outcomes
- 8) Dissemination and accountability
- 9) Anticipated benchmarks and timelines
- 10) Analysis/Assessment of Outcomes (Onsite Sessions 2 & 3)*
- 11) Dissemination and Accountability (Onsite Sessions 2 & 3)*

(Appendix F: Leadership Project Outline)

** The institution is responsible for ensuring components #10 and #11 related to the fellow's leadership project is completed, if the project extends past the Fellowship.*

- d. Implement the learning project throughout ELI (and beyond in many cases) with adjustments made based on feedback provided by mentors, ELI colleagues, and institutional supervisors and mentors.
- e. Prepare a 1-page concise summary of the participant's learning project in response to 7 defined questions to address:
 - 1) Provide a brief description of your Leadership Project and progress achieved throughout the ELI Fellowship. Include your expected outcomes and when are they anticipated to occur.
 - 2) What challenges did you face?
 - 3) What lessons have you learned as a result of this leadership project?
 - 4) If you had an ability to have changed something in your leadership project, what might that be?
 - 5) What are your next steps in the project?
 - 6) How has this project been reported to your academic institution and supervisor?
 - 7) What 2 questions would you like to pose about your leadership project to your ELI colleagues?

(Appendix O: Leadership Project Summary Worksheet)

5. Goal: Develop and refine a professional leadership development plan, throughout the Education Leadership Institute, where the implementation of this plan will begin with the support of the academic institution and Education Leadership Institute Fellowship mentors.

Objectives:

- a. Describe your progressive history of leadership management and future leadership goals as a part of the application process. **(Appendix P: Application)**
- b. Create a professional leadership development plan on the ELI Leadership Development Reflections worksheet that includes the following defined components:
 - 1) Well-defined goals that are S.M.A.R.T.
 - 2) Necessary action steps
 - 3) Defined timeline

- 4) Resources needed
- 5) Identification of other persons to be involved
- 6) Evidence of achievement of the each defined goal.

(Appendix F: ELI Leadership Project Outline)

- c. Based on applied content provided throughout ELI, self, peer, and mentor assessments, feedback from ELI colleagues, mentors, and institutional supervisors, and professional and personal experiences, modify your Leadership Development Reflections worksheet accordingly.
- d. Integrate journaling activities completed throughout all 9 modules of ELI into your leadership development plan.
- e. Discuss ongoing leadership development plan and related experiences during face-to-face sessions and mentor/fellow-in-training subgroup conference calls to further refine and implement your plan.
- f. Implement your leadership development plan and track and assess the outcomes (positive and areas for improvement) on your Leadership Development Reflections worksheet.

(Appendix O: Leadership Project Summary Worksheet)

6. Goal: Participate in self and peer assessments, module, mentor, program, and long-term professional evaluations to shape the continued enhancement of the Education Leadership Institute.

Objectives:

- a. Complete all required assessments candidly as a part of ELI to include
 - 1) ELI Admission Survey
 - 2) Bolman and Deal leadership assessment instrument
 - 3) Self-assessment
 - 4) Peer (1) leadership assessment
 - 5) Assessment of mentors in subgroup
 - 6) Module assessments
 - 7) Module posttest evaluation of the curriculum with a score of 70% or higher.
 - 8) Standardized postcourse evaluation, as required by the Learning Center.
 - 9) ELI module-specific evaluation
 - 10) ELI program assessment at graduation, 1 year, 3 years, and 5 years post program.
- b. Integrate information gleaned from these assessments to inform personal leadership development plan, leadership project, and future growth as a leader within the institution, higher education, and the profession.

(Appendix G: Assessment Forms and Appendix M: Bolman and Deal Instrument)

7. Goal: Develop a strong network among the cohort of fellows-in-training involved in the Education Leadership Institute.

Objectives:

- a. Sign a Participant Covenant (**Appendix Q: Covenant**) to provide a safe environment for open communication to protect the confidentiality of fellows-in-training and mentors with respect to all shared information provided throughout the course of ELI.
- b. Participate in all required aspects of the ELI program to include a webinar orientation, 3 ELI face-to-face (onsite) sessions, ELI module discussion forums with faculty, mentorship subgroup conference calls, mentorship subgroup discussion forums available in an e-community on the APTA Hub, and other informal networking through the Education Leadership Conference (ELC), national conferences, and e-mail.

(Appendix H: Communication Vehicles)

- c. Participate in further networking as a community through available resources such as an e-community on the APTA Hub and alumni events during the Education Leadership Conference (ELC). (**Appendix R: Networking Breakfast**)

Program Policies & Procedures

Evidence 1.2.2.A Provide the program’s policies and procedures for all items listed in the ABPTRFE “Evaluative Criteria for Accreditation of Non-Clinical Residency or Fellowship Programs for Physical Therapists” that includes at a minimum, an annual review and assessment of the program’s policies and procedures. Please do not include the organization’s entire policy and procedures manual.

The ELI Work Group meets annually in person for a 2-day meeting at APTA in August to review ELI policies and procedures, curricular content, objectives and supporting materials to ensure they are still contemporary and are aligned with the mission of the program. The work group also meets by web conference at least 4 times per year for the purpose of reviewing the ELI applicants for the next cohort and the agenda, role plays, case vignettes, assessment forms, and other related materials for each onsite session. (**Appendix VV: Work Group Minutes**)

1) A policy on confidentiality safeguards for records and personal information of faculty, staff, and participants.

Data submitted by or on behalf of an ELI applicant is used for the application process in communication with the ELI program director and the ELI Work Group. APTA protects the application information provided and does not share this data with other parties. Upon acceptance, selected data is shared with the current ELI mentors.

All accepted fellows-in-training sign a Participant Covenant (**Appendix Q: Covenant**) to provide a safe environment for open communication to protect the confidentiality of fellows-in-training and mentors with respect to all shared information provided throughout the course of ELI. The ELI program director does not publish any information about the fellows-in-training until after they graduate from the program.

Upon graduation from the program the names and credentials of ELI graduates are posted on the APTA website and shared with the physical therapy education communities. After graduation, APTA publishes a Leadership Summary Booklet Form for the most recent cohort of graduates. The booklet includes the following information for every fellow: 3 ELI goals, 3 ELI expectations, and a short synopsis of the individual’s leadership project. The summary is disseminated at the

annual Education Leadership Conference and made available to prospective and new fellows-in-training to assist them in the development of their own leadership projects.

2) The policies and procedures related to admission to the residency/fellowship program including transfer of credit policies and any special considerations used in the process.

ELIGIBILITY CRITERIA

- The applicant should be a current or emerging leader or academic administrator.
- Due to the urgent need to prepare current and future academic administrators, preference will be given to applicants identified as novice (0 – 7 years) PT and PTA academic administrator leaders.
- The applicant must be a current member of the APTA.
- The applicant is CAPTE compliant if currently holding the position of PT or PTA program director.
- The applicant must be licensed/registered/certified or licensure eligible in the United States and affiliated with a U.S. academic institution.

APPLICATION PROCESS: The applicant must:

- Complete the Application Form. (**Appendix P: Application**)
- Complete a Letter of Intent.
- Provide a Curriculum Vitae with evidence of past leadership activities updated in the past 3 months.
- Sign the Statement of Commitment (located within the application).
- Submit at the time of the application, a nonrefundable application processing fee of \$100.00.
- Secure an ELI nomination from current program director, dean, or other appropriate administrator/supervisor. (**Appendix SS: Application Nomination Form**)
- Submit completed electronic application materials to the ELI program director.

APPLICATION REVIEW PROCESS: The ELI program director confirms that an applicant (1) is an active APTA member and (2) has submitted all required application materials by the deadline before the related files are shared with the ELI Work Group. Complete application materials for every applicant are uploaded by the program director to a private online community for the ELI Work Group hosted on the APTA Hub.

Initial competence of applicants is determined by the ELI Work Group via an admissions rubric during the application review process. Each work group member independently reviews all completed applications for the year and assign points based on the evaluation criteria in the rubric. In terms of special consideration, the rubric includes “plus factors” in which reviewers are asked, “Does applicant bring other intangibles to the program that contribute to leadership potential, diversity, or group dynamics but may not be reflected in the rubric (eg, life experience in different culture, racial or ethnic diversity, experience as another type of professional prior to PT, etc.)?” (**Appendix W: Rubric**)

The program director compiles the scores submitted each member of the ELI Work Group into a single spreadsheet and creates a preliminary ranking of applicants from highest to lowest based on the aggregate scores. The spreadsheet also includes written comments and questions for each applicant. The spreadsheet is posted on APTA Hub for the group to review in advance of any decisions. The work group then meets with the program director via a web conference to discuss

each candidate and come to a consensus on the ranking and decisions. The program director is responsible for notifying all applicants of the group's decisions.

ENROLLMENT: Upon acceptance to the program in the early spring, each participant must sign a covenant that articulates the set of expectations and responsibilities for fellows-in-training. (**Appendix Q: Covenant**). Additional documents provided for the fellow-in-trainings' review as a part of their orientation process include the following:

- A description of the roles and expectations of fellows-in-training, mentors, faculty, program coordinator, and ELI Work Group (**Appendix H: Communication Vehicles**)
- Description of communication procedures and demonstration of available technologies and their requirements (**Appendix I: Technology and Communication**)
- Expectations for fellows-in-training, mentors, faculty, and staff (**Appendix S: Expectations**)
- Fellows-in-training and mentor subgroup assignments (**Appendix T: Mentorship Groups**), and
- Fellows-in-training and mentor contact information in the form of rosters. (**Appendix U: Rosters**)
- Fellows-in-training and mentor biographies (new in 2016).

TRANSFER CREDIT: Transfer credit policies are not applicable.

3) The policies and procedures related to participant retention and progression through the program (eg, passing criteria on examinations, timelines, etc.)

Policies related to remediation and retention for ELI are based on several program design issues that facilitate the likelihood that fellows-in-training will successfully complete the program.

- All of the individuals who apply to ELI must have a nomination from their supervisor/dean as well as support (financial and other resources) to participate.
- Applicants and their supervisor/dean (nominator) are made aware of the requirements and commitment for participating in the yearlong ELI program within the application materials to make an informed decision by the applicant and for the nominator to make an informed decision regarding the readiness of the applicant for this program.
- Applicants must complete a leadership development project during the Fellowship and beyond, in some cases, that is directed toward an initiative/effort within their academic institution. This project helps to ensure a commitment on the part of the fellow-in-training to "give back" to their respective institution and the supervisor/dean to have an ongoing investment in the participant's progress.
- Applicants are reviewed by the ELI Work Group based on a set of established criteria, including eligibility criteria and the individual's readiness and institutional support for this program. In some cases, the determination is made that this program is not a good fit or the timing for the applicant is not in his or her best interest.

Fellows-in-training must complete all online coursework and achievement of a score of >70%; a leadership development plan description, implementation, and ongoing evaluation of a leadership project throughout ELI; active participation in 3 face-to-face sessions and the orientation webinar; and required assessments.

4) A policy and procedure related to academic remediation of the program participant and the criteria for dismissal from the program if remediation efforts are unsuccessful.

Fellows-in-training are informed of the expectations of the Fellowship prior to application, at acceptance and periodically during the course of the Fellowship. The ELI Expectations for Stakeholders document (**Appendix S: Expectations**) was developed by the ELI Work Group and is shared with fellows-in-training prior to the start of the program as a means to notify them of the program completion requirements. The Covenant serves as a promissory by each trainee to fulfill those expectations. (**Appendix Q: Covenant**)

There are 2 options for action in the event that a fellow-in-training does not meet these expectations. The first is dismissal, which may occur upon repeated failure on assessments, lack of participation in didactic, self-directed and mentoring activities and/or failure to plan and (partly) implement the final project. The second option, which the program director and work group would rarely invoke, would be transfer to the next cohort, an action that can disrupt the cohesiveness of the new, as well as the former cohort. To date no fellows-in-training have been dismissed from the ELI Fellowship program due to failure to successfully fulfill the requirements.

Areas where remediation could be required are associated with the completion of all online coursework and achievement of a score of >70%, completion of a leadership development plan description, implementation, and ongoing evaluation of a leadership project throughout ELI, active participation in 3 face-to-face sessions and the orientation webinar, and completion of required assessments.

- Fellows-in-training must complete both the online module posttest assessment and Learning Center course assessment in order to obtain CEUs for each module.
- Should a fellow-in-training not successfully complete an online module posttest assessment with a score of 70% or greater the first time, he or she is entitled to retake the test an additional 3 times to successfully achieve a passing score.
- Given that all of the fellows-in-training in ELI are supported financially by their academic institution and are required to provide a leadership project for their organization with communication back to their supervisor/dean, there is a strong incentive for the individual to complete the yearlong program as a part of the retention process and institutional investment. The leadership development project is not required to be completed by the end of the year as some of these projects span several years.
- Monthly conference calls with mentor/fellow-in-training subgroups were added mid-way during the Fellowship with the first cohort to enhance communication and mentorship, enable fellows-in-training to better pace themselves through the online modules, for mentors to identify fellows-in-training having difficulty with concepts, workload, or other leadership issues and provide additional support, and for fellows-in-training to seek clarification about assignments or other questions throughout ELI.
- With respect to the assessments, the ELI program director is able to check to see if the fellows-in-training have completed the online assessments, admissions survey, mentorship assessments, graduation survey, and other forms; and, follow up with a personal email or phone call requesting the completion of a specific assessment within a defined time frame.

5) A policy and procedure related to the availability of, and accessibility to educational advising and counseling.

Educational Advising: ELI mentors are an essential component throughout the entire program of the ELI Fellowship to provide guidance to fellows-in-training in a focused learner-centered program. They are full participants in the onsite and online aspects of the program and have access to all materials. These individuals provide regular, timely, and close interaction with the fellows-in-training through coaching, advising, and thought-provoking questions on an individual level, as well as through their assigned small group during the Institute.

Counseling: ELI fellows-in-training are not employees of APTA. A fellow seeking counseling for personal issues will be referred to the individual's affiliated institution or organization utilized for program participant education, which assumes a continuing obligation to provide related services to the individual, should these types of problems arise.

6) Nondiscriminatory policies and procedures for the recruitment, admission, retention, and dismissal of program participants.

Equal Opportunity Statement: The Education Leadership Institute follows the APTA Equal Opportunity Statement. APTA prohibits preferential or adverse discrimination on the basis of race, creed, color, gender, gender expression, gender identity, age, national or ethnic origin, sexual orientation, disability, or health status in all areas including, but not limited to, its qualifications for membership, rights of members, policies, programs, activities, and employment practices. APTA is committed to promoting cultural diversity throughout the profession.

7) A grievance policy or mechanism of appeal that ensures due process for program participants, faculty, and staff

ELI fellows-in-training are instructed to first contact the ELI program director regarding any questions or concerns about the program or claims it is not in substantial compliance with the ABPTRFE Rules of Practice and Procedure. The ELI program director will attempt to promptly address any concerns and may choose to escalate the issues to the appropriate ELI stakeholder groups for additional review or discussion, if deemed necessary. The ELI program director will communicate to the individual what actions will be or were taken in response to the question or concern. Fellows-in-training are instructed during the orientation to contact ABPTRFE directly and follow the instructions on the complaints webpage at <http://www.abptrfe.org/Complaints/> to submit a formal complaint against ELI, if they are unsatisfied with the response from the program director and stakeholder groups to their concern.

8) A probationary period policy, if applicable.

Item is not applicable to ELI because fellows-in-training are not employees of APTA or practicing as licensed physical therapists as part of the Fellowship program.

9) Policies and procedures related to participant withdrawal and termination from the program;

APTA does not issue tuition refunds to individuals who are dismissed from the program due to failure to complete program requirements. Individuals who withdraw from the program for health or personal reasons must provide an explanation to the ELI program director. The ELI Work Group will determine whether an individual who withdraws for personal or health reasons is eligible for a deferral. Requests for tuition deferrals or refunds will be considered by APTA on a case-by-case basis. No refunds or deferrals have been requested or granted to date.

10) Health and professional liability insurance requirements.

Item is not applicable to ELI because fellows-in-training are not employees of APTA or practicing as licensed physical therapists as part of the Fellowship program.

11) Policies concerning professional, family, and sick leave and the effect such leaves would have on the participant's ability to complete the program.

Item is not applicable to ELI because fellows-in-training are not employees of APTA.

12) Program specific policies that relate to maintaining program compliance with accreditation criteria.

The position description for the ELI program director addresses ABPTRFE accreditation compliance. The program director "Ensures the program's compliance with the provisions of the current version of the ABPTRFE Evaluative Criteria and Rules of Practice and Procedure." (Appendix MM: Position Description)

CAPTE, regional, and state accreditation policies are not applicable to ELI.

Evidence 1.2.2.B Describe any changes to the program's policies and procedures that were made during the program's recent accreditation period as a result of the review process and the impact of these changes on the program.

- **Application Timeframe:** For applicants applying to the 2016-2017 cohort, the application cycle deadline was extended until March 1, 2016 based on a recommendation from the ELI program director in January 2016, to allow for marketing to prospective candidates during the February 2016 Combined Sections Meeting, and to increase the likelihood that a sufficient number of applicants would apply. The deadline extension may have contributed to the highest number of applicants to the program in its history. For applicants applying to the 2014-2015 and 2015-2016 cohorts, the Call for Applicants was launched earlier beginning on September 1 with an application deadline on December 20, 2014 for the 2015 cohort; and December 1, 2015 for the 2016 cohort, respectively. The earlier dates enabled more time for the ELI WG to review applications in January and notify applicants of their status. (**Appendix V: Announcements**)
- **Application Rubric:** The ELI Work Group annually reviews all of the relevant documents associated with ELI, including the Evaluation Criteria Rating Form used to assess applicants and the application documents (applicant, nominator). The purpose of the review is to ensure congruence between those specific items being evaluated from the application and the language and scoring rubric used on the Evaluation Form. The ELI Work Group revised the rubric in August 2014 for the 2015-2016 cohort, so that applicants were required to meet the CAPTE Program director or residency/fellowship program director qualifications, as described below:
 - PT Director – Associate professor or higher, earned academic doctoral (PhD or equivalent) degree
 - PTA Director – Master's degree, physical therapist
 - Residency/Fellowship – Board Certified Specialist in program area providing the experience (**Appendix W: Rubric**)
- **Application:** Based on feedback on the ELI admissions survey and to ensure that applicants fully comprehended the specific requirements for the application process, changes were required on the electronic application to ensure clarity of the directions for applicants and that all criteria being

evaluated were clearly articulated and identified as required elements for the application. Additionally, as an application fee was assessed beginning for 2014-15 and tuition was increased in 2015-16, concomitant changes were required on the application. Parallel changes were made on the Nominator Application as program requirements changed to ensure that the nominator/supervisor was informed of all costs associated with ELI in supporting the nominee. (**Appendix P: Application**)

- **ELI Budget, Tuition and Fees:** Per a decision of the APTA CEO in 2015, ELI moved to a stand-alone activity (62-05) within the 2016 APTA budget, so that the APTA staff and Board of Directors could better distinguish the program's revenue and expenses from other budget activities in the Academic Services division within the Education Department of the Professional Affairs Unit. As part of the 2015 budget review process, the ELI program director consulted with the ELI Work Group on the potential implications of an application fee and tuition increase on the program. The purpose of the fee increase was to reflect the true costs associated with delivering the Fellowship and better represent the value the program brings to fellows-in-training and institutions. Historical budget information for the Fellowship enabled the ELI program director to identify realistic expenses and revenues for the program in the future. The ELI Work Group reviewed the historical data and endorsed the fee increases in consideration of other comparable leadership programs. The APTA Board of Directors later approved a tuition increase from \$5000 per year to \$6000 per year and an ELI application fee increase from \$50 to \$100 for the 2016-2017 cohort. The overall intent of these changes was to enable ELI to be a "budget neutral" program for APTA, while providing a high-quality Fellowship program for new and emerging leaders. (**Appendix J: Budget Review**)
- **Onsite Meeting Logistics:** Based on feedback from previous ELI cohorts via the onsite session surveys and informal feedback provided from mentors to the ELI program director following each onsite session, the geographic locations for all onsite sessions for the 2015-2016 cohort and beyond must be within 1 hour of the nearest commercial airport to minimize transportation costs and time required to travel to the location. The locations will continue to be distributed across 3 US regions (east coast, Midwest, and west coast) to balance the time and costs associated with travel for the fellows, mentors, and program director.
- **Leadership Development Plan:** The leadership development plan document was revised by the ELI Work Group significantly in 2012 based on informal feedback from ELI participants and mentors in the 2011-12 cohort. The revised document, known as the "Leadership Development Reflections Worksheet," engages the fellow-in-training in ongoing reflection throughout the program and is updated and discussed during each onsite session (**Appendix E: Leadership Development Reflections Worksheet**).
- **Mentorship Log:** Based on feedback from ABPTRFE site visit in 2011, the 2012-2013 cohort and all subsequent cohorts were provided with an Excel tracking document, known as a Mentorship Log, to compile information regarding the actual time involved in mentorship during ELI to include the online coursework (readings, assignments, journaling, etc.), mentorship provided by ELI mentors, and mentorship provided by designated persons within their higher education environments. The log has enabled the Fellowship program to more accurately capture the amount of time fellows spend in the curriculum content with faculty experts and completing module assignments, mentorship with ELI mentors, and mentorship with institutional administrators and faculty. It also enabled a more accurate accounting of time spent in each module that was used to adjust continuing education units (CEUs). (**Appendix X: Mentorship Log**)
- **ELI Mentor Debrief Post Onsite Session:** Based on a recommendation made by the ELI program director in fall 2013, time is now reserved on the agenda during the first and second onsite sessions

for a focus group session with the 6 ELI mentors. The purpose of the debrief is for the program director to obtain mentor feedback using semi-structured and open-ended questions about the module content, onsite curriculum, and mentor preparation for each onsite session. Mentor comments and feedback are shared with the ELI Work Group to enable adjustments in subsequent onsite sessions, curriculum content, and mentorship training processes. (**Appendix D: Onsite Agendas**)

- **Curriculum Refinements:** After 2 cohorts graduated, the ELI Fellowship Work Group conducted a more comprehensive curriculum assessment based on feedback from 27 ELI Fellow graduates and 13 one year post-graduation assessments regarding the program and its curriculum. As a result, specific content was identified within the 9 modules that required enhancement, refinement, or further clarification. Faculty experts teaching these online modules integrated these changes in their module content. (**Appendix B: Resources Module 1-9**)
- **Orientation:** A decision to reduce the ELI Orientation webinar from 3 to 2 hours was made by the ELI Work Group in May 2013 with the intent of eliminating redundancy and providing more comprehensive resource documentation. Since July 2013, the orientations have begun with a 1-hour virtual mentorship subgroup meetings intended to help participants understand the roles of mentors and fellows-in-training, schedule their August and September conference calls/webinars, and get to know each other. The second hour is an Adobe Webinar led by the ELI program director, and includes the mentors, fellows-in-training, and available members of the ELI Work Group. It provides an overview of the program, requirements, technology, and ends with a closing inspirational speaker, which is typically the current APTA President. (**Appendix A: Orientation**)
- **Online Calendar:** Use of the calendar feature, available through the ELI Program e-community on the APTA Hub was enhanced to include launch dates for each module, dates and times for each faculty members' virtual office hours, deadlines for assignments prior to and following each onsite session, and deadlines for making hotel reservations. Fellows requested the use of this additional resource to facilitate their ability to meet required deadlines and serve as a central place to locate all of the information throughout the Fellowship. (**Appendix Y: Calendar**)
- **Format of Virtual Office Hours:** Faculty and ELI Fellows in the 2013-2014 cohort offered informal feedback during onsite sessions about the use of the APTA Learning Management System for the discussion forums in which faculty and fellows type in their questions and responses. This forum format was deemed cumbersome, time consuming, and less engaging. Beginning with ELI Module 4 during the 2014-15 cohort, the module faculty were required to provide at least 1 of their 3, 2-hour virtual faculty office hours in a recorded webinar format. Based on feedback from the 2015-2016 cohort in the module assessments and during the onsite sessions, the ELI program director decided to discontinue the use of discussion forums in lieu of online webinars for all virtual office hours for the 2016-2017 cohort.
- **Faculty Webinar Format during Onsite Sessions:** Based on feedback from ELI mentors and fellows-in-training, the format of the group faculty webinars during onsite sessions was changed, so that fellows-in-training posed their questions to faculty directly via the web camera, rather than through a facilitator. Questions for each faculty webinar are now compiled from fellows-in-training who are noted on the questions, categorized by theme, and shared with the ELI Faculty in advance of the onsite webinar. (**Appendix Z: Questions for Faculty**)
- **New Case Vignettes and Role Play Documents:** Mentors meet informally at the end of each onsite session and in 2014 identified the need for more case vignettes and role plays, so they could choose those that were most relevant and appropriate for each cohort. In 2015, the ELI Work Group drafted

new case vignettes and a role play that could be substituted for an existing one during the onsite session. These drafts were subsequently reviewed by a group of ELI Fellows who provided feedback. The revised cases were reviewed again by the work group to create a final set that were first used during the second onsite session in March 2016. There are currently 8 case vignettes and 3 role plays available. Additional edits will be considered by the ELI Work Group during its next meeting in August 2016. (**Appendix N: Case Vignettes**)

- **ELI Fellowship Graduation:** Upon completion of the ELI Fellowship program and the graduation ceremony, Fellow graduates may invite partners/significant others, at their cost, to attend the ceremony as well as inviting ELI faculty members (at the Fellowship's expense) to attend who live near the onsite locations. The change was the result from informal requests from ELI graduates who wanted to share their achievement with others and offered for the first time prior to the 2014 ELI graduation. A faculty member joined the graduation ceremonies in Denver, CO in 2014 and Sonoma, CA in 2015. The graduation ceremony continues to invite a dynamic guest speaker and leader identified by the ELI Work Group, provide a graduation ceremony program, an embossed ELI Fellow certificate, ELI ribbon, and ELI Fellow pin presented by the fellow's mentors, and cohort photo to be posted on the APTA website. (**Appendix AA: Graduation Guests**)
- **ELI Policies:** As a result of situations that occurred in the ELI Fellowship Program and ABPTRFE accreditation requirements, several policies were created by the ELI Work Group over the years:
 - **ABPTRFE Grievance Policy** – All fellows-in-training are provided with a copy of ABPTRFE's Grievance Policy to ensure that they are aware of the values and procedures associated with grievance should they be needed. The Grievance policy is also discussed with fellows-in-training during the ELI orientation webinar.
 - **Tuition** - Tuition payments must be received at APTA prior to the date of the launch of the July ELI Orientation for that cohort. An applicant can withdraw from the ELI Fellowship program and the institution will be refunded tuition payment submitted **prior to the date of the launch** of the July Orientation session. Withdrawing from the program after the July Orientation does not permit refunding of tuition payment.
 - **Applicant Deferrals** - Deferrals by applicants into the ELI program are approved for a one year period without being require to reapply to the program. Once that year lapses, if the applicant chooses not to attend the program and wishes to participate at a later date, he or she must resubmit a new application for that cohort.
 - **Applicants** – All applicants are required to be physical therapists, members of APTA, and in the case of serving as a current program director, must meet current CAPTE requirements for PT program directors or PTA program directors. Applicants are required to be affiliated with an academic institution that will financially fund their tuition. Individuals not associated with an academic institution and wish to pay for the tuition out-of-pocket are not currently eligible.
 - **ELI Work Group Member Terms** – ELI Work Group terms are for a 3-year period with staggered appointments to ensure continuity of knowledge and processes. The terms of some ELI Work Group members were extended beyond the 3 year period to ensure continuity during the transition to a new ELI program director in 2016. Due to the decreased workload after initial accreditation was achieved, the work group was reduced

from 7 individuals to 6. Designated positions on the work group now include the following:

1. Program director from ACAPT
2. Education Section member
3. ELI Fellow graduate
4. Residency or fellowship program director
5. External member with university wide senior leadership expertise
6. Individual with senior program director leadership experience

In some cases, an ELI Work Group member may represent more than one category (eg, program director who is also an ELI graduate).

- o **Fellowship Requirements** – As a part of the ELI Covenant that the fellow-in-training signs when accepting the invitation to register for the Fellowship, a summary list of expectations and requirements are included in this document that delineate successful completion of the Fellowship program. (**Appendix S: Expectations**).

The list specifies requirements associated with

- Completion of the 9 modules and passing each posttest assessment with a 70% or greater to earn CEUs;
- Completion of all assessments associated with the Fellowship program as well as post-graduation assessment;
- Active participation at all 3 onsite sessions with active engagement;
- Completion and submission of the mentorship log;
- Attendance of at least 1 of the 3 virtual faculty office hours for each of the 9 modules;
- Attendance and participation in the mentorship monthly meetings (audio and/or visual calls);
- Development and implementation (partial) of a leadership project shared during the final onsite session as a capstone; and,
- Completion of a leadership reflections worksheet for each onsite session for leadership development, reflection, and self-assessment.

Program Participant Recruitment and Matriculation

Evidence 1.2.3.1 Provide the program’s recruitment materials (not a link to the program’s website).

- **Logo:** The APTA art department created an official ELI logo that is used in part to promote the program to prospective candidates. (**Appendix BB: Logo**)
- **Website:** The ELI webpages on the APTA website contain all of the relevant information about ELI including the application and nomination forms (www.apta.org/eli). (**Appendix CC: Website**)
- **Video:** To better promote the ELI Fellowship to prospective candidates, a series of testimonials by ELI graduates was recorded about the benefits of the program. This testimonial was added to a redesigned ELI Fellowship website. This testimonial was previously shared with ABPTRFE and posted on its Facebook page. To view the most recent [video](#), go to the APTA website or YouTube channel.

- **Application Announcements** are provided annually in the fall and early spring about application process that are disseminated to the PT and PTA education community via the APTA Friday Focus Professional Affairs e-newsletter, the APTA Component Leadership e-newsletter, the ACAPT Blast-of-the-Week, the Education Section e-newsletter, the PTA Educator SIG e-newsletter, and the ABPTRFE e-newsletter. In addition, reminder emails are sent via all of these communication vehicles as the ELI application deadline approaches. (**Appendix DD: ACAPT Announcements**)
- **Graduation Announcements:** APTA announces the list of new ELI Fellows in August following the graduation in July. The announcement and picture are posted on the ELI page of the APTA website, in the APTA Friday Focus Professional Affairs newsletter, the ACAPT Blast-of-the-Week, Education Section newsletter, and PTA Educators SIG newsletter. (**Appendix EE: Graduation Announcement**)
- **ELI Networking:** Announcements about the ELI application deadline extension were shared internally with ELI fellows-in-training, fellows (graduates), mentors, and work group members in an effort to use networking within the education community to spread the word about value of ELI to prospective students. (**Appendix V: Announcements**)
- **ELI Fellows Summary Booklet:** Fellows are required to complete a one-page summary that includes their three personal ELI Goals, three lessons learned in ELI, and a brief summary of their leadership project. The booklet is shared in multiple events and is intended in part to promote the program to prospective candidates. (**Appendix FF: Booklet**)
- **Education Leadership Conference (ELC)**
 - **ELI Networking Breakfast at ELC:** Based on feedback from ELI fellows and graduates for continued networking, the first ELI Fellow alumni networking event (breakfast) was held in conjunction with the Education Leadership Conference hosted by the Education Section and ACAPT in 2013 and again in 2014 and 2015. Another breakfast is planned at ELC in 2016. Invitations were extended to ELI graduates and fellows enrolled in the program, current and past ELI mentors, and current and past ELI Fellowship Work Group members. (**Appendix R: Networking Breakfast**)
 - **Announcements at ELC:** The Fellowship is promoted annually at the Education Leadership Conference (ELC) with announcements made by the ELI program director at the business meetings of ACAPT, the Education Section, the PTA Educators SIG, Clinical Education SIG, Faculty SIG, and Residency/Fellowship SIG.
 - **Display Table at ELC:** Promotional materials for the Fellowship are prominently displayed on a table top at ELC each year for attendees. (**Appendix GG: Signs**)
 - **ELI Session:** In 2013, selected ELI graduates participated on a panel session and shared their experiences in ELI with ELC attendees.
- **Combined Sections Meeting (CSM)**
 - **Presentation at SIG Meetings at CSM:** The Fellowship is promoted annually at the Combined Section Meeting. In 2016, announcements were made by the ELI program director about the application deadline extension during the business meetings of ACAPT, the Education Section, the PTA Educators SIG, the Clinical Education SIG, the Faculty SIG, and the Residency and Fellowship SIG.

- **ABPTRFE Networking Reception at CSM:** The ELI program director and a representative from the ELI Work Group participated in the 2-hour ABPTRFE Networking Reception at CSM in 2015 and 2016 to promote the Fellowship to prospective candidates.
- **Postprofessional Education Booth:** Information about ELI was prominently displayed at the APTA postprofessional booth at the APTA Resource Center in the CSM Exhibit Hall with approximately 13,000 in attendance. (**Appendix HH: CSM Booth**)
- **Bookmarks:** The ELI Bookmark is provided at the Education Leadership Conference as a promotional piece to remind all fellows-in-training that the call for applicants is open for the next cohort and the website where the documents can be accessed. (**Appendix II: Bookmark**)
- **Ribbons:** Conference ribbons are provided to ELI graduates, work group members, and mentors for use at CSM, ELC, and NEXT conferences. (**Appendix JJ: Ribbon**)
- **ELI Pins:** Each ELI graduate is presented a lapel pin at the time of graduation and encouraged to wear it at physical therapy and other professional events. (**Appendix KK: Pins**)

Evidence 1.2.3.2 Provide a copy of a blank contract, agreement, or letter of appointment between the program and participant.

As part of the ELI electronic letter of acceptance (**Appendix LL: Acceptance Letter**), ELI participants (fellows-in-training) are notified they must sign a Covenant (**Appendix Q: Covenant**) intended to provide a safe environment for open communication and networking to protect the confidentiality of participant and mentors with respect to all shared information provided throughout the course of ELI. In addition, the ELI fellows-in-training receive materials in advance of the July Orientation (**Appendix A: Orientation**), including Expectations for ELI Stakeholders (**Appendix S: Expectations**).

Evidence 1.2.3.3 Utilize the Form below to provide the name, permanent e-mail address, start date, and name of mentor for all currently enrolled program participants. Add additional rows as needed.

PROGRAM PARTICIPANT NAME (2015-2016 Cohort)	PERSONAL EMAIL ADDRESS <i>(eg. yahoo, gmail)</i>	START DATE <i>(mm/dd/yy)</i>	NAME(S)/CREDENTIALS OF PARTICIPANT'S MENTOR(S)
Teressa Felice Brown, PT, DPT, PhD, OCS	tbrown@westcoastuniversity.edu	07/13/15	Michael J Emery, PT, EdD, FAPTA Rebecca Craik, PT, PhD, FAPTA
Tracy Jan Brudvig, PT, DPT, PhD, OCS	tbrudvig@mghihp.edu	07/13/15	Suzanne Reese, PT, MS David Lake, PT, PhD
Stacy Lynne Fritz, PT, PhD	sfritz@mailbox.sc.edu	07/13/15	Suzanne Reese, PT, MS David Lake, PT, PhD
Stacie J Fruth, PT, DHSc, OCS	fruths@uindy.edu	07/13/15	Suzanne Reese, PT, MS David Lake, PT, PhD
Alfred Burke Gurney, PT, PhD, OCS	bgurney@salud.unm.edu	07/13/15	Diane Jette, PT, DSc, FAPTA Thomas Mayhew, PT, PhD
Melanie Rebecca Heffington, PT	Melanie.heffington@tulsacc.edu	07/13/15	Michael J Emery, PT, EdD, FAPTA Rebecca Craik, PT, PhD, FAPTA
Joy R Karges, PT, DPT, CWS	Joy.karges@usd.edu	07/13/15	Diane Jette, PT, DSc, FAPTA Thomas Mayhew, PT, PhD

Edward Christopher Mahoney, PT, DPT, CWS	EMahon@lsuhsc.edu	07/13/15	Michael J Emery, PT, EdD, FAPTA Rebecca Craik, PT, PhD, FAPTA
J. Adrienne McAuley, PT, DPT, MEd, FAAOMPT, OCS	jmcauley@une.edu	07/13/15	Diane Jette, PT, DSc, FAPTA Thomas Mayhew, PT, PhD
Audrey Lynn Millar, PT, PhD	millaral@wssu.edu	07/13/15	Michael J Emery, PT, EdD, FAPTA Rebecca Craik, PT, PhD, FAPTA
Ivan Joseph Mulligan, PT, DPT, ATC, SCS	ivanmulligan@msn.com	07/13/15	Suzanne Reese, PT, MS David Lake, PT, PhD
Catherine Ortega, PT, EdD, ATC, OCS	ortegac2@uthscsa.edu	07/13/15	Suzanne Reese, PT, MS David Lake, PT, PhD
Myles Clare Quiben, PT, DPT, PhD, GCS, NCS	Myles.Quiben@gmail.com	07/13/15	Diane Jette, PT, DSc, FAPTA Thomas Mayhew, PT, PhD
Howell E Tapley, PT, PhD, OCS	howietaply@aol.com	07/13/15	Michael J Emery, PT, EdD, FAPTA Rebecca Craik, PT, PhD, FAPTA
Diane M Wrisley, PT, PhD, NCS	d.wrisley@wingate.edu	07/13/15	Diane Jette, PT, DSc, FAPTA Thomas Mayhew, PT, PhD

2.0 RESOURCES

Faculty

Evidence 2.1.1.A Provide the program director’s job description that includes ensuring the program’s compliance with the provisions of the current version of the ABPTRFE Evaluative Criteria and Rules of Practice and Procedure.

(Appendix MM: Program Director)

Evidence 2.1.1.B If there has been a change in the program director, since the program was granted recognition status or since the program’s last report, complete and attach the “Program Director/Program Coordinator Information Form” for the program director.

(Appendix NN: Program Director/Coordinator Information Form)

Evidence 2.1.2.A Utilize the Form below for each faculty member that meets the description (full-time or part-time) in the ABPTRFE Accreditation Handbook. Provide names, credentials, title, primary place of employment, including the institution/organization where the faculty provides instruction/mentoring, areas of responsibility, recent professional development activities and the number of hours per week dedicated to the residency/fellowship program. If single faculty member, briefly describe the program’s contingency plan should the faculty member not be able to function in this role.

Copy this Form as needed and complete one Form for all faculty active in the program.

NAME (with credentials) Lynn M Gangone, EdD, MEd, MS
TITLE Vice President for Leadership Programs
Number of hours per YEAR dedicated to the residency/fellowship program: 40
PLACE OF EMPLOYMENT American Council on Education (ACE)

TYPE OF INSTRUCTION/MENTORING (check all that apply) <input type="checkbox"/> Onsite <input checked="" type="checkbox"/> Webinar <input type="checkbox"/> Conference call <input checked="" type="checkbox"/> E-mail
AREAS OF RESPONSIBILITY IN PROGRAM Module 1: Personal Leadership and Management
RECENT PROFESSIONAL DEVELOPMENT ACTIVITIES (i.e., continuing education, publications, research, etc.) (See Appendix OO for Faculty CVs)

NAME (with credentials) Charlotte Royeen, PhD, OTR/L, FAOTA
TITLE Dean
Number of hours per YEAR dedicated to the residency/fellowship program: 40
PLACE OF EMPLOYMENT Rush University Medical Center, College of Health Sciences
TYPE OF INSTRUCTION/MENTORING (check all that apply) <input type="checkbox"/> Onsite <input checked="" type="checkbox"/> Webinar <input type="checkbox"/> Conference call <input checked="" type="checkbox"/> E-mail
AREAS OF RESPONSIBILITY IN PROGRAM Module 2: Higher Education, Healthcare, and Society
RECENT PROFESSIONAL DEVELOPMENT ACTIVITIES (i.e., continuing education, publications, research, etc.) (Appendix OO: Faculty CVs)

NAME (with credentials) Nancy Hall, PhD through 2015-16 cohort. (Dr. Gail Jensen will replace Dr. Hall in the 2016-17 cohort)
TITLE David Ross Boyd Professor Emeritus
Number of hours per YEAR dedicated to the residency/fellowship program: 40
PLACE OF EMPLOYMENT University of Oklahoma College of Medicine
TYPE OF INSTRUCTION/MENTORING (check all that apply) <input type="checkbox"/> Onsite <input checked="" type="checkbox"/> Webinar <input type="checkbox"/> Conference call <input checked="" type="checkbox"/> E-mail
AREAS OF RESPONSIBILITY IN PROGRAM Module 3: Institutional Leadership and Management
RECENT PROFESSIONAL DEVELOPMENT ACTIVITIES (i.e., continuing education, publications, research, etc.) (Appendix OO: Faculty CVs)

NAME (with credentials) Gail M. Jensen, PT, PhD, FAPTA (beginning with the 2016-2017 cohort)
TITLE Dean of the Graduate School and College of Professional Studies, Vice Provost for Learning and Assessment, Professor of Physical Therapy, and Faculty Associate
Number of hours per YEAR dedicated to the residency/fellowship program: 40
PLACE OF EMPLOYMENT Creighton University, Center for Health Policy and Ethics

TYPE OF INSTRUCTION/MENTORING (check all that apply) <input type="checkbox"/> Onsite <input checked="" type="checkbox"/> Webinar <input type="checkbox"/> Conference call <input checked="" type="checkbox"/> E-mail
AREAS OF RESPONSIBILITY IN PROGRAM Module 3: Institutional Leadership and Management
RECENT PROFESSIONAL DEVELOPMENT ACTIVITIES (i.e., continuing education, publications, research, etc.) (Appendix OO: Faculty CVs)
NAME (with credentials) Priscilla J Moss, PhD
TITLE Director, Innovation Alliance (retired)
Number of hours per YEAR dedicated to the residency/fellowship program: 40
PLACE OF EMPLOYMENT Innovation Alliance: The University of Akron, Stark State College, Lorain County Community College
TYPE OF INSTRUCTION/MENTORING (check all that apply) <input type="checkbox"/> Onsite <input checked="" type="checkbox"/> Webinar <input type="checkbox"/> Conference call <input checked="" type="checkbox"/> E-mail
AREAS OF RESPONSIBILITY IN PROGRAM Module 4: Student Affairs
RECENT PROFESSIONAL DEVELOPMENT ACTIVITIES (i.e., continuing education, publications, research, etc.) (Appendix OO: Faculty CVs)
NAME (with credentials) Steve Milam, JD
TITLE Affiliate Assistant Professor, Attorney at Law, and Consultant
Number of hours per YEAR dedicated to the residency/fellowship program: 40
PLACE OF EMPLOYMENT Department of Bioethics and Humanities for the University of Washington School of Medicine and in private practice as an attorney and consultant on issues related to higher education and health law.
TYPE OF INSTRUCTION/MENTORING (check all that apply) <input type="checkbox"/> Onsite <input checked="" type="checkbox"/> Webinar <input type="checkbox"/> Conference call <input checked="" type="checkbox"/> E-mail
AREAS OF RESPONSIBILITY IN PROGRAM Module 5: Legal and Policy Issues
RECENT PROFESSIONAL DEVELOPMENT ACTIVITIES (i.e., continuing education, publications, research, etc.) (See Appendix OO for ELI Faculty CVs)
NAME (with credentials) James E Kemper, PhD
TITLE Vice President for Administration
Number of hours per YEAR dedicated to the residency/fellowship program: 40
PLACE OF EMPLOYMENT Zane State College

TYPE OF INSTRUCTION/MENTORING (check all that apply) <input type="checkbox"/> Onsite <input checked="" type="checkbox"/> Webinar <input type="checkbox"/> Conference call <input checked="" type="checkbox"/> E-mail
AREAS OF RESPONSIBILITY IN PROGRAM Module 6: Human Resources Management
RECENT PROFESSIONAL DEVELOPMENT ACTIVITIES (i.e., continuing education, publications, research, etc.) (Appendix OO: Faculty CVs)

NAME (with credentials) Melanie Gehen, MHSA
TITLE Vice President for Academic Fiscal Affairs and Interim Vice President for Finance and CFO.
Number of hours per YEAR dedicated to the residency/fellowship program: 40
PLACE OF EMPLOYMENT State University New York (SUNY) Downstate Medical Center
TYPE OF INSTRUCTION/MENTORING (check all that apply) <input type="checkbox"/> Onsite <input checked="" type="checkbox"/> Webinar <input type="checkbox"/> Conference call <input checked="" type="checkbox"/> E-mail
AREAS OF RESPONSIBILITY IN PROGRAM Module 7: Resources and Financial Management
RECENT PROFESSIONAL DEVELOPMENT ACTIVITIES (i.e., continuing education, publications, research, etc.) (Appendix OO: Faculty CVs)

NAME (with credentials) Robert Mundhenk
TITLE Senior Scholar
Number of hours per YEAR dedicated to the residency/fellowship program: 40
PLACE OF EMPLOYMENT Higher Learning Commission of the North Central Association of Colleges and Schools
TYPE OF INSTRUCTION/MENTORING (check all that apply) <input type="checkbox"/> Onsite <input checked="" type="checkbox"/> Webinar <input type="checkbox"/> Conference call <input checked="" type="checkbox"/> E-mail
AREAS OF RESPONSIBILITY IN PROGRAM Module 8: Program Development and Assessment
RECENT PROFESSIONAL DEVELOPMENT ACTIVITIES (i.e., continuing education, publications, research, etc.) (Appendix OO: Faculty CVs)

NAME (with credentials) Deborah DeWolfe Waddill, EdD, MA-Educational Technology
TITLE President
Number of hours per YEAR dedicated to the residency/fellowship program: 40
PLACE OF EMPLOYMENT Restek Consulting, LLC, a firm which provides consulting services on the strategic selection, design, and

implementation of human and organizational learning services enabled by technology.
TYPE OF INSTRUCTION/MENTORING (check all that apply)
<input type="checkbox"/> Onsite <input checked="" type="checkbox"/> Webinar <input type="checkbox"/> Conference call <input checked="" type="checkbox"/> E-mail
AREAS OF RESPONSIBILITY IN PROGRAM Module 9: Relationships, Influence, and Partnerships
RECENT PROFESSIONAL DEVELOPMENT ACTIVITIES (i.e., continuing education, publications, research, etc.) (Appendix OO: Faculty CVs)

Evidence 2.1.2.B Describe the qualifications for appointment to the program’s faculty.

ELI Faculty Qualifications

ELI faculty who teach the curriculum online modules are recognized experts in their respective domains. Faculty content experts are selected to broaden each fellow-in-training’s perspective and understanding of leadership within the context of higher education. They include an attorney for legal and policy issues, a chief financial officer of a university for financial and budget issues, a human resources director of a large university, a student affairs and admissions administrator, an assessment scholar from the largest regional accrediting agency in the United States, an education technology expert, and higher education leadership experts in senior level positions at universities and a prominent higher education association. ELI faculty have been recommended by APTA ELI Work Group members and colleagues within their respective fields for their expertise and contributions.

Faculty must review and sign a contract as a “work for hire” to participate in ELI. Faculty are content experts who are interested and willing to teach their content in an online format using an adult and interactive learning format. Faculty are also required to provide 3 “virtual office hours” to be available during their respective modules synchronously for learners to respond and comment on their discussion forum entries and pose additional questions. Faculty also agree to be available for 2-hour, interactive webinar scheduled during one of 3 onsite sessions where learners pose questions of the panel (Faculty for Modules 1-3 during the October session, Modules 4-6 during the March session, and Module 7-8 during the July session). (**Appendix PP: Faculty Agreement**)

The role of ELI faculty carries a significant responsibility and expectations for a high level of performance with respect to the curriculum content and face-to-face interactions.

ELI Mentor Qualifications

Ideal characteristics of the mentors are that they are senior physical therapists or physical therapist assistants who are active or recently retired faculty with significant experience and success as program directors or leaders in physical therapy education, APTA members who satisfy the Commission on Accreditation in Physical Therapy Education (CAPTE) criteria for program administrators, and possess the following attributes:

- Exhibit strong interpersonal and communication skills, including listening, negotiating, conflict resolution, and facilitating creative thinking in others.
- Think strategically and analytically and be able to apply data in decision making
- Show active and effective networking and ability to identify and forge new relationships to promote physical therapy higher education programs.

- Embody a positive and optimistic view regarding the role of an academic administrator and the future of physical therapist and physical therapist assistant education programs.
- Demonstrate balance in personal and professional roles and responsibilities and foster this in others.
- Empower others via active listening and facilitate discussions effectively to elicit shared decision-making.
- Foster application of learning theory, principles, and emerging concepts in higher education to their home institution.
- Articulate a clear view of the role of the consumers/recipients of physical therapy education, including the students and other stakeholders.
- Be observant of change in the environment and able to impart a vision of “future” to faculty.
- Understand organizational change in both the macro and micro environment and manifest the ability to respond positively.
- Understand emerging demands on physical therapists and physical therapist assistants in the 21st century.
- Demonstrate patience with learners who struggle to understand and adapt to new organizational challenges.
- Show skill in creating fiscal approaches to meet changing program demands.
- Demonstrate a value for understanding broad issues in health care that do or may affect the preparation of physical therapists and physical therapist assistants.
- Be open to learning about and facilitating the use of new ideas and approaches with fellows-in-training.
- Demonstrate humility and integrity and a genuine interest in learning from others

(Appendix QQ: Mentorship Guide)

Evidence 2.1.3 Describe the professional development opportunities and resources that were available to faculty over the recent accreditation period to maintain and improve their effectiveness as educators.

ELI Faculty: By the nature of their full-time positions in their respective fields, ELI faculty have professional development opportunities to expand their content expertise. Their development as effective ELI faculty members is provided through regular feedback from the ELI program director and quality control mechanisms that ensure the modules meet the expectations set forth by the ELI Work Group.

The ELI program director provides feedback to faculty that is collected in the following ways:

- Annual review of faculty revisions to new and revised ELI module content.
- Observation of faculty during virtual office hours.
- Observation of faculty during group webinars during onsite sessions.
- Informal feedback provided by the ELI fellows-in-training, fellows (graduates), mentors, work group, and other faculty, as well the APTA Learning Center.
- Formal assessment processes.

Quality control measures include a rigorous curriculum integrity review of all content to ensure:

- Learning outcomes are clear and measurable.
- Content addressed within each module achieves the learning outcomes.
- Interactive learning is provided to engage learners through required reading, reflective exercises, journaling, and application activities within learner’s respective organization.
- Discussion forum activities engaging ELI faculty and peers.

External reviewers may be consulted upon the recommendation of the ELI Work Group, ELI program director, and APTA Learning Center staff.

All curricular content also undergoes copyediting to ensure accuracy of copyrighted information, consistency in formatting and structure, and clarity of the information that is presented.

As for their learning enhancement, ELI faculty are able to access all of the modules that comprise ELI. Likewise, they have access to communicating with all of the ELI faculty within the program to create stronger linkages between modules that are related. For example, Module 9 includes references to content provided in earlier modules with a new perspective or twist as related to relationships, influence, and partnerships. This module not only provides new information but also helps to connect curricular content provided from other modules.

ELI Mentors: All ELI mentors are provided with an ELI Mentorship Guide (**Appendix QQ: Mentorship Guide**) that provides the requirements of ELI mentors to include the purpose of ELI mentorship, goals of the mentoring relationship, mentor position description, mentorship assessment, resources for effective mentoring techniques including references and websites.

ELI mentors have access to all of the 9 online modules provided in the APTA Learning Center throughout the yearlong program. As a part of their mentorship role, they review the curricular content and readings to become familiar with contemporary content and terminology being used throughout the program. As a part of their responsibility, ELI faculty have an opportunity to further enhance their knowledge of higher education leadership by reviewing the contemporary references and readings provided through the Modules by expert faculty.

Beginning in 2015, ELI mentors were provided given complimentary access to the Residency and Fellowship Mentorship online course through the APTA Learning Center and 5 of the mentors completed the course. APTA’s 2015 and 2016 budgets for ELI included the registration fee for mentors to complete this course. As new mentors become involved in the ELI Fellowship program, the opportunity for them to complete this online course will also be made available through the program’s budget. (**Appendix RR: Budget**)

Prior to 2016, all ELI mentors were provided with the booklet resource: Phillips-Jones L. Skills for Successful Mentoring: Competencies of Outstanding Mentors and Mentees. Grass Valley, CA: CCC/The Mentoring Group; 2003. <http://www.mentoringgroup.com>

Services to Program Participants

Evidence 2.2.1.1.A Utilize the Form below to list all affiliated institutions or organizations utilized for program participant education.

Affiliated institutions and mentors for 2015-2016 ELI cohort:

NAME OF AFFILIATED INSTITUTION/ORGANIZATION	AFFILIATED INSTITUTION/ORGANIZATION ADDRESS	OWNED/OPERATED BY SPONSORING ORGANIZATION	NAME AND CREDENTIALS OF MENTOR(S) AT FACILITY
West Coast University	509 N Vermont Ave, Los Angeles, CA 90004	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	Ann H Newstead, PT, PhD, GCS, NCS, CEEAA
MGH Institute of Health Professions	Charlestown Navy Yard, 36 1st Ave, Boston, MA 02129-4557	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	Pamela K Levangie, DPT, DSc, FAPTA

University of South Carolina	921 Assembly St, Columbia, SC 29208	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	James Carson, PhD
University of Indianapolis	1400 E Hanna Ave Indianapolis, IN 46227-3630	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	Stephanie Kelly, MS, PT, PhD
University of New Mexico	1 University of New Mexico Albuquerque, NM 87131-1000	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	Bob Schenck, M.D.
Tulsa Community College	909 South Boston Avenue Tulsa, OK 74119-2011	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	Suzanne Reese, PT, MS
University of South Dakota	414 East Clark Vermillion, SD 57069-2307	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	Lana R Svien, PT, MA, PhD
LSUHSC-S Wound Care Management Residency	1501 Kings Highway, Shreveport, LA 71130	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	Sharon Dunn, PT, PhD, OCS
University of New England	716 Stevens Avenue Portland, ME 04103-2656	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	Michael R Sheldon, PT, PhD
Winston-Salem State University	601 Martin Luther King Jr. Drive Winston-Salem, NC 27110	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	Peggy Valentine, EdD
Saint Francis University	117 Evergreen Drive Loretto, PA 15940-9704	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	Donald E. Walkovich, DHSc, MS, OTR/L, FAOTA
The University of Texas Health Science Center	7703 Floyd Curl Drive San Antonio, TX 78229	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	David C. Shelledy, Ph.D., RRT, FAARC, FASAHP
University of North Texas Health Science Center	3500 Camp Bowie Boulevard Fort Worth, TX 76107-2699	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	Yasser Salem, PT, MS, PhD, NCS, PCS
Indiana State University	567 North 5th Street Terre Haute, IN 47809	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	Jack Turman, Jr, PT, MPT, PhD
Wingate University	515 N Main Street Wingate, NC 28174-3087	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	Kevin E Brueilly, PT, PhD

Evidence 2.2.1.1.B Provide signed letters of agreement for all facilities not owned/operated by the program’s sponsoring organization that define clearly the relationship, the governance, and the responsibility that will be borne by the organization and the affiliated institution/organization for all aspects of the program.

All faculty teaching online modules in the Education Leadership Institute are considered a “work for hire” with a signed contract that includes remuneration provided for their services. (**Appendix PP: Faculty Agreement**)

Evidence 2.2.1.1.C Summarize any changes to affiliations during the recent accreditation period and the impact they have had on the program.

Per the previous item, all faculty content developed and delivered as part of an ELI Module are considered to be “work for hire.” APTA retains the copyright to the Module content, regardless of a faculty member’s affiliation with ELI or their affiliation with other organizations. Two faculty members will retire from ELI following the 2015-2016 cohort. Replacements were nominated by other ELI faculty and approved by the ELI Work Group. The new faculty are currently in the process of reviewing the Module content. They have the ability to use the Module content as written or revise it to reflect their perspectives and resources. If the faculty wishes to make changes to the learning objectives they would need to be done in collaboration with the ELI Work Group and APTA staff, including the ELI program director and director of professional development.

Each applicant must have the resource support (financial, time, institutional support) of their supervisor/dean to participate in ELI. Fellows-in-training, as a part of their application process, must

obtain a nomination from their supervisor/dean in support of their acceptance into this program with their signature attesting to this support. Since the tuition is paid for by the supporting institution prior to the participant beginning in ELI, financial support is guaranteed upfront for the participant. This also provides assurances for the participant that it is unlikely that the institution will terminate their involvement as they would not be refunded the tuition once the program has started. (**Appendix SS: Application Nomination Form**)

Financial Resources

Evidence 2.3.1.A Describe the program's current sources of funding.

ELI is a separate program (62-05) in the APTA budget. It is funded through the area of Academic Services within the Education Department of the APTA Professional Affairs Unit. In the 2016 APTA annual budget, the estimated total revenue for ELI Fellowship program was \$99,540 and the expenses were \$115,319, including the ABPTRFE reaccreditation fee of \$4,876.25 and the annual reaccreditation fee of \$1538.13.

The primary funding sources for ELI are as follows for the 2016-2017 cohort (**Appendix RR: Budget**):

- Application Fee: \$100 per applicant (24 total in 2016)
- Tuition: \$6,000 per fellow-in-training (18 total in 2016)

Additional in-kind support is provided by the APTA Education Section, which pays the full ELC registration fee for enrolled ELI fellows-in-training who are members of the Education Section and a partial registration for those who are not Education Section members. The cost to the Section is estimated to be \$5130 (18 fellows x \$285 registration fee) for the 2016-2017 cohort.

Evidence 2.3.1.B Describe any changes to funding during the program's recent accreditation period and its impact on the program.

In 2016, ELI moved to a stand-alone program (62-05) within the APTA annual budget, so that APTA staff and board of directors could distinguish the revenue and expense for ELI from other activities in the area of Academic Services within the Education Department of the Professional Affairs Unit. It is expected to remain a separate budget item in 2017. To reflect the true costs associated with delivering the Fellowship and to better represent the value the program brings to fellows-in-training and institutions, the ELI tuition was increased from \$5000 per year to \$6000 per year, and the ELI application fee was increased from \$50 to \$100, for the 2016-2017 cohort.

The recent increase in tuition and fees did not have an adverse effect on applications, matriculation numbers, or applicant ratings. ELI experienced the highest number of applicants (24) and enrollees (18) in its history in 2016, despite the fee increases. None of the applicants for the 2016-17 cohort identified the tuition or fees as a barrier to applying. The increase in fees allows ELI to be a revenue neutral line item in the APTA budget and supports its sustainability of ELI as viable program in the future.

Educational Resources

Evidence 2.4.1 Describe the resources that have been available to both faculty and program participants over the recent accreditation period and any anticipated changes for the upcoming accreditation period.

All faculty, mentors, and fellows-in-training have access to all 9 online modules in the APTA Learning Center that have been developed expressly for ELI. As a result, fellows, mentors, and faculty are exposed to myriad resources including publications, research articles, and website references. They also have access to organizational resources provided by National Association of College and University Business Officers ([NACUBO](#)), College and University Professional Association for Human Resources ([CUPA-HR](#)), [NASPA](#): Student Affairs Administrators in Higher Education, and other association resources not typically available to educators in physical therapy.

Within each module, required and recommended readings and references are provided and where available, links are provided for easy access. The ELI e-communities available through APTA Hub provide opportunities to share references and resource links within mentor/participant subgroups. In addition, as a part of each online module, assignments are required for fellows-in-training to connect with key individuals within their respective institutions to facilitate further discussion about selected topics. Individuals include the following:

- Student Affairs
- Legal Counsel
- Chief Financial Officer
- Dean
- Provost
- Human Resources

These individuals are also available to provide fellows-in-training with additional education resources and connections to other institutional personnel. In addition, fellows-in-training have access to educational resources through their individual institutions and library resources.

3.0 CURRICULUM

Curriculum Development

Evidence 3.1.1 Identify the year and version of the DRP/DFP or ABPTRFE approved comprehensive needs assessment used to develop the curriculum.

As a nonclinical program in education leadership, there were no DSP/DASP or clinical practice analysis conducted that were used to develop the ELI curriculum. A comprehensive needs assessment was conducted of the educational community as a proxy for a “practice analysis” prior to the development of ELI. The needs assessment report provides a confidential report that was shared with the APTA Board of Directors in 2008. This report provides guidance and direction regarding the needs of the physical therapy community for content areas considered “important” to “very important” by > 75% of survey respondents. Additionally, survey questions also addressed preferred program structure and format, level of interest, and individual and institutional costs. This needs assessment formed the foundation for the curriculum and how content would be clustered to create what are now 9 online modules provided throughout the yearlong program. (**Appendix TT: Needs Assessment Report**)

Evidence 3.1.2.A Provide the major content areas of the program's curriculum and their relationship to the DRP/DFP or comprehensive needs assessment using the form template located on the ABPTRFE website under Application Resources.

CONTENT AREA	RELATED AREA IN DSP/DASP/Practice, Analysis/ Comprehensive Needs Assessment	LOCATION IN CURRICULUM (eg, semester, week)	DIDACTIC EXPERIENCES	CLINICAL EXPERIENCES
1. Personal Leadership and Management	<ul style="list-style-type: none"> ● Leadership (theory, application, assessment) vs management (theory, application, and assessment) ● Characteristics of effective leaders ● Fundamental principles of human behavior associated with leadership development ● Maintaining credibility ● Motivational strategies ● Perils and pitfalls in leadership ● Ethics and professionalism in leadership ● Reflection and self-assessment ● Finding balance in professional and personal life (stress, burnout, and renewal) 	1st set of 3 modules completed July-October	Primary delivery of content through Power Point content and required and recommended readings	<p>Assignments apply content through journaling activities, “stop and think” activities, reflective questions for the discussion forum, and other assignments.</p> <p>Completion of Bolman and Deal leadership assessment Self-assessment of leadership skills. Feedback from others assessment on leadership.</p>

<p>2. Higher Education, Health Care, and Society</p>	<ul style="list-style-type: none"> ● Global perspective of higher education and health care systems ● Higher education structure ● Changing the culture of physical therapy within the academy ● Identifying emerging opportunities and challenges ● Facilitating academic excellence in faculty (teaching, service, and scholarship) 	<p>1st set of 3 modules completed July-October</p>	<p>Primary delivery of content through PowerPoint content and required and recommended readings</p>	<p>Assignments apply content through journaling activities, “stop and think” activities, reflective questions for the discussion forum, and other assignments</p>
<p>3. Organizational Leadership and Management</p>	<ul style="list-style-type: none"> ● Organizational behavior and development/ group dynamics ● Strategic planning and team building ● Strategic thinking and decision-making ● Negotiation and conflict management ● Leading effective meetings ● Moving an organization from “good to great” ● Succession planning 	<p>1st set of 3 modules completed July-October</p>	<p>Primary delivery of content through PowerPoint content and required and recommended readings</p>	<p>Assignments apply content through journaling activities, “stop and think” activities, reflective questions for the discussion forum, and other assignments</p>

4. Student Affairs	<ul style="list-style-type: none"> ● Student policy and procedures ● Student grievance ● Student recruitment and retention ● Admissions ● Technical skills and essential competencies ● Student negotiation and conflict resolution ● Interacting with the next generation of learners 	2nd set of 3 modules completed November - March	Primary delivery of content through PowerPoint content and required and recommended readings	Assignments apply content through journaling activities, “stop and think” activities, reflective questions for the discussion forum, and other assignments
5. Legal and Policy Issues	<ul style="list-style-type: none"> ● Legal, ethical, and regulatory issues in higher education ● Institutional policy and procedures ● Managing and taking risks ● Faculty and student grievance 	2nd set of 3 modules completed November - March	Primary delivery of content through extensive exploration of case-based legal and policy issues and precedents through Power Point content and required and recommended readings	Assignments apply content through journaling activities, “stop and think” activities, reflective cases, reflective questions for the discussion forum, and other assignments

<p>6. Human Resources Management</p>	<ul style="list-style-type: none"> ● Faculty and staff recruitment, retention, hiring, retrenchment, and firing ● Faculty policy and procedures ● Managing faculty workload ● Mentoring and modeling ● Supervision and delegation ● Communication and media relations 	<p>2nd set of 3 modules completed November - March</p>	<p>Primary delivery of content through extensive exploration of case-based legal and policy issues and precedents through Power Point content and required and recommended readings</p>	<p>Assignments apply content through journaling activities, “stop and think” activities, reflective cases, reflective questions for the discussion forum, and other assignments</p>
<p>7. Resources and Financial Management</p>	<ul style="list-style-type: none"> ● Business and financial management in education including alignment of faculty and financial resources ● Advocacy (within and external to an organization) ● Stewardship and fiduciary responsibilities ● Negotiating under different circumstances ● Faculty identification and development (i.e., new, adjunct, and current) ● Managing financial risks 	<p>3rd set of 3 modules completed April – July</p>	<p>Primary delivery of content through Power Point content and required and recommended readings</p>	<p>Assignments apply content through journaling activities, “stop and think” activities, reflective questions for the discussion forum, and other assignments</p>

8. Program Development and Assessment	<ul style="list-style-type: none"> ● Program evaluation and outcome measures ● Curriculum design for a contemporary society ● Embracing evaluation ● Quality improvement and accreditation 	3rd set of 3 modules completed April – July	Primary delivery of content through Power Point content and required and recommended readings	Assignments apply content through journaling activities, “stop and think” activities, reflective questions for the discussion forum, and other assignments
9. Relationships, Influence, and Partnerships	<ul style="list-style-type: none"> ● Technology in education ● Building collaborative partnerships, alliances, and networks ● How to lead and facilitate change; Leading from the middle ● Public relations and marketing ● Understanding power and how to influence ● Evaluating and managing risks in partnering 	3rd set of 3 modules completed April – July	Primary delivery of content through Power Point content and required and recommended readings	Assignments apply content through journaling activities, “stop and think” activities, reflective questions for the discussion forum, and other assignments
Orientation Webinar	<ul style="list-style-type: none"> ● Orientation to ELI ● Roles and responsibilities of fellows-in-training, mentors, faculty, ELI Work Group, and Program Coordinator/APTA Staff ● Orientation to ELI technologies ● Initial development of community network 	July		Discussion about the use of program resources and technologies, roles and responsibilities of all parties involved, initiating of community networking, expectations of fellows-in-training in ELI.

1st Onsite (Face-to-Face) Session	<ul style="list-style-type: none"> • Linking leadership development to physical therapy and higher education 	October prior to Education Leadership Conference		<p>Application and integration of concepts to physical therapy from modules 1, 2, and 3 through ELI faculty panel webinar discussion, peer reviewed cases at primarily the individual level, and participant/mentor discussion of real life cases.</p> <p>Development/refinement of their Leadership Development Plan, Leadership Project, and mentor-participant mentorship process.</p>
2nd Onsite (Face-to-Face) Session		March		<p>Application and integration of concepts to physical therapy from modules 4, 5, and 6 through ELI faculty panel webinar discussion, peer reviewed cases at the institutional level, and discussion of participant real life cases. Modeling of mentors via a mentor panel.</p> <p>Progress, feedback, and refinement of Leadership Development Plan and Leadership Project.</p> <p>On the spot role play management of a leadership situation at the organizational level.</p>

3rd Onsite (Face-to-Face) Session	<ul style="list-style-type: none"> Quality improvement and physical therapy accreditation 	July		<p>Application and integration of concepts to physical therapy from modules 7, 8, and 9 through ELI faculty panel webinar discussion, peer reviewed cases at the community/society level, and discussion of participant real life cases. Progress and next steps for the leadership development plan and discussion of the status of the leadership project. Sharing and reflection about the ELI program, personal journey and transformation, next steps, facilitating ongoing community, etc. Completion of module assessments, participant/mentor mentorship assessment, 3rd onsite session assessment, and program assessment.</p>
Mentor/Participant Subgroup Conference Calls		~Monthly throughout ELI with the exclusion of October, March, and July face-to-face sessions		<p>Discussion of module content and real life issues associated with the content. Facilitate pacing of curricular content to keep subgroups moving fairly consistently throughout the modules to enable discussions between onsite sessions.</p>

Evidence 3.1.2.B Provide an outline or flow chart of the overall sequencing of content in the program’s curriculum across the entire time period of the residency or fellowship. Briefly explain the rationale behind the organization and sequencing of the curricular content as well as how the program ensures congruency between the didactic and mentoring aspects of the curriculum. Describe how the organization, sequencing, and integration of the courses facilitate participant achievement of the expected outcomes.

The ELI flow chart displayed in this section and in Appendix UU provides for the overall sequencing of program content throughout the yearlong curriculum. The program has 4 essential components that include:

1. Completion of online curriculum didactic content with opportunities for application of content through activities and faculty interaction;
2. Completion of onsite (face-to-face) sessions with mentorship with opportunities to clarify and integrate curriculum content by reflecting on and discussing case vignettes and real life situations;
3. Development, refinement, implementation, and ongoing assessment of a leadership development plan; and,
4. Development, refinement, implementation, and assessment of an institutional leadership project that that may or may not be completed by the end of the ELI program.

(Appendix UU: Flow Chart)

Organization: The program is organized based on the rationale that fellows-in-training need a clear orientation to their roles and responsibilities and an ability to share their expectations for ELI. Additionally, the roles of faculty and mentors are clearly distinguished during the orientation and supporting documentation. Lastly, the role and responsibilities of the ELI program director and ELI Work Group are provided as well as understanding that ELI is a part of a shared partnership within the physical therapy education community. **(Appendix G: Expectations)**

Sequence: Curriculum content is provided by faculty with fellows-in-training completing 3 modules prior to each onsite session. Modules have been clustered together based on related areas where content from one module may be referred to in a subsequent module. For instance, the first 3 modules completed on personal leadership and management, higher education, health care and society, and organizational leadership and management are significantly related. Module 1 discussed leadership constructs and lays the strong foundation using Bolman and Deal’s theoretical framework for understanding differences between leadership and management. This module is foundational to all of the other modules provided in ELI. Subsequent curricular content follows the same approach with modules clustered in groups of three for fellows-in-training to complete. Module 9, the last in the series, addresses its content of relationships, influence, and partnerships while also connecting the participant back to content that was presented throughout other ELI modules using a different and new perspective. The module sequence supports adult learning theory and a developmental curriculum where earlier content is reintroduced to engage learners in critical thinking and connect earlier concepts at a higher level of taxonomy. **(Appendix B: Module Resources 1-9).**

Integration: Following the completion of each set of 3 modules, fellows-in-training actively engage in onsite (face-to-face) discussion to apply and integrate concepts learned in the modules to physical therapy and higher education. During these sessions, opportunities to ask questions of a panel of faculty experts live during a webinar with use of a webcam provides a cost-effective mechanism to connect fellows-in-training and faculty together to discuss concepts presented in all 3 modules. The integration of virtual and

onsite content enables fellows-in-training to draw comparisons about concepts presented by faculty with lively discussions. (**Appendix Z: Questions for Faculty**)

Connection between Module Content and Mentoring: Onsite sessions also enable face-to-face mentorship in smaller subgroups to apply and integrate content learned to peer review case vignettes, role play situations, and participant's real life situations in a supportive and reflective environment. Opportunities to share learning experiences are applied during mentor subgroups and plenary sessions. During these sessions fellows-in-training also continue to share their progress on their leadership projects and to obtain additional ideas and constructive feedback from peers and mentors. Reports on the status of their leadership development plans are shared in mentor subgroups with opportunities for continue feedback and personal growth. Likewise, assessments are completed during onsite sessions such as mentorship and peer assessments, program assessment, module assessment. (**Appendix D: Onsite Agendas**)

Use of other available technologies throughout ELI enable the continuation of discussions about a variety of leadership issues and curricular content such as monthly conference calls and e-communities on the APTA Hub. (**Appendix H: Communication Vehicles**)

Outcome Continuum: The importance of continuing the connection among fellows-in-training and mentors is a critical component of ELI as a part of the mentorship process as well as building a strong network and leadership community. Following graduation, fellows are subscribed to an e-community on the APTA Hub for ELI graduates intended to foster ongoing conversations among this first graduating cohort and promote an alumni event scheduled annually at the October Education Leadership Conference (ELC). The event is sponsored by ACAPT and the Education Section of the APTA. (**Appendix R: Networking Breakfast**)

ELI Flow Chart

July	August	Sept	October	Nov	Dec	Jan	Feb	March	April	May	June	July	October	
ELI Webinar Orientation (2 hours)														
Complete online Modules 1, 2, and 3 in the APTA Learning Center (didactic)			1 st Onsite Session with Education Leadership Conference (ELC) (2 days - applied)											
	Mentor / Fellow Subgroup Calls (1-2 hrs)	Mentor / Fellow Subgroup Calls (1-2 hrs)	Complete online Modules 4, 5, and 6 in the APTA Learning Center (didactic)					2 nd Onsite Session (2 days - applied)						
				Mentor / Fellow Subgroup Call (1-2 hrs)	Mentor / Fellow Subgroup Call (1-2 hrs)	Mentor / Fellow Subgroup Call (1-2 hrs)			M/F Subgroup Call (1-2 hrs)	M/F Subgroup Call (1-2 hrs)	Optional M/F subgroup Annual Conference			
			Complete online Modules 7, 8, and 9 in the APTA Learning Center (didactic)									3 rd Onsite Session (2 days - applied)		
			ELI Application Process Call for Applicants			Application Review & Notification of Acceptance into ELI							ELI Webinar Orientation (2 hours)	Alumni Event at ELC
													1 st Onsite Session with ELC (2 days - applied)	

Evidence 3.1.2.C Provide the course syllabi, including course description, educational objectives, requirements for successful completion, and instructional methods.

See **Appendix B: Resources for Module 1-9** to view the course syllabi, course description, educational objectives, requirements for completion, and instructional methods. The instructional methods are provided to fellows-in-training during the Orientation webinar in July.

Implementation

Evidence 3.2.1 Identify the minimum and maximum amount of time (in months) allowed for the participant to complete the program that is inclusive of remediation and leave of absence periods. If the program provides more than one model (eg, part-time and full-time) provide the length of the program for each model.

The ELI participant is required to commit to one year (July to July) to complete the entire program as a part of the signed Covenant (**Appendix Q: Covenant**). ELI has an established a policy regarding program withdrawal or deferment. This policy was applied to 2 persons invited to participate in the ELI cohort 2011-2012 and again with the 2016-17 cohort.

“An individual may elect to withdraw from the ELI program prior to the launch of the ELI Orientation webinar and be returned all tuition monies paid.”

“An individual may elect to defer their status in the ELI program prior to the launch of the ELI Orientation webinar for one year for inclusion in the next cohort with the option of returning any paid tuition to date to be billed with the next cohort’s tuition billing cycle or to have any paid tuition remain and deducted from the next cohort billing cycle.”

This option is intended to accommodate those fellows-in-training who may have budgeted the ELI tuition in the year that they applied and who would not have otherwise have funding available in the following year.

“Once the participant has been involved in the launch of the program with the July ELI Orientation webinar and all tuition monies have been paid, he or she may defer participation in ELI for one year with tuition funds held in payment toward their return to ELI in the next cohort.”

Evidence 3.2.2 Use the Form below to list the number of hours dedicated to each instructional method used to achieve the performance outcomes. Single-site and multi-facility programs, provide one form that is inclusive of the entire program. For multi-site programs, a separate form is required for each program participant.

For Multi-site Program Only: Name of Program Participant

(See Appendix L: CEUs)

PROGRAM COMPONENT	TOTAL HOURS IN PROGRAM
INSTRUCTIONAL HOURS	
Didactic Instruction (List all courses)	
<ul style="list-style-type: none"> Module 1: Personal Leadership and Management 	4.20 CEUs, 42 contact hours
<ul style="list-style-type: none"> Module 2: Higher Education, Healthcare Systems, and Society 	4.00 CEUs, 40 contact hours
<ul style="list-style-type: none"> Module 3: Institutional Leadership and Management 	3.60 CEUs, 36 contact hours
<ul style="list-style-type: none"> Module 4: Student Affairs 	3.10 CEUs, 31 contact hours
<ul style="list-style-type: none"> Module 5: Legal and Policy Issues 	4.40 CEUs, 44 contact hours
<ul style="list-style-type: none"> Module 6: Human Resource Management 	3.90 CEUs, 39 contact hours
<ul style="list-style-type: none"> Module 7: Resources/Financial Management 	3.20 CEUs, 32 contact hours
<ul style="list-style-type: none"> Module 8: Program Development and Outcomes Assessment 	3.30 CEUs, 33 contact hours
<ul style="list-style-type: none"> Module 9: Relationships, Influence, and Partnerships 	2.60 CEUs, 26 contact hours
Journal/Reflection	18 contact hours (2 per mod)
Discussion Forums (virtual or live)	63 contact hours (~7/module)
Research Activities	<i>Fellows-in-training may be involved in research activities as part of their leadership project.</i>
Home or Independent Study Course(s)	<i>Hours are imbedded in didactic instruction. All online modules are completed off site.</i>
Required Readings	<i>Estimated hours for required readings are bundled into the CEU credits and contact hours for each module</i>
Interprofessional Collaboration and Activities	<i>Fellows-in-training may be involved in IPE activities as part of their leadership project.</i>
Teaching	Not applicable
Other: (Please list)	
INSTRUCTIONAL HOURS SUBTOTAL	
404 Hours	
MENTORING (Minimum of 150 hours for residency; 100 hours for fellowship).	
<ul style="list-style-type: none"> Mentoring provided by a physical therapist mentor 	<ul style="list-style-type: none"> Orientation Webinar = 2 hrs 1st Onsite Session = 16 hrs 2nd Onsite Session = 16 hrs 3rd Onsite Session = 16 hrs Monthly calls = 9 hrs Mentorship group discussions via email and e-community = 24 hrs (~2 hour per month) Institutional mentor = 9 hrs (1 hour per module) <p>Mentorship by institutional supervisor is variable depending upon the project and module. Institutional mentors may include non-PTs (eg, university CFO)</p>
<ul style="list-style-type: none"> Mentoring provided by a non-PT mentor 	Faculty discussion forums = 27 hours (3 hours per module)
MENTORING HOURS SUBTOTAL	
119 Hours	
GRAND TOTAL HOURS IN PROGRAM	
523 Hours	

4.0 ONGOING EVALUATION

Evaluation of the Program

Evidence 4.1.1 Summarize the program’s annual review process of its goals and describe any changes made over the accreditation period as a result. Describe any triggers that resulted in a mid-cycle review of the program goals. Provide minutes from all meetings over the recent accreditation period.

The goals for ELI have remained consistent since its inception given that the longitudinal data supported the defined outcomes for the program and its graduates based on evaluations provided by program graduates at the time of graduation, 1 and 3 year post-graduation evaluations as well as those evaluations provided by their supervisors at graduation and one year post-graduation. No mid-cycle changes of the goals occurred during this accreditation period given the data available.

The ELI work group meets annually for 2 days in August to conduct a comprehensive review of the program’s vision, goals, faculty and curricular content, application processes, website content, case vignettes and role plays, mentor selection, budget, invited guest speakers, and assessments used to evaluate all aspects of the program. This review is based on data compiled from evaluations associated with the program that include both longitudinal and cohort-based data from mentors, fellows, faculty, graduate fellows’ direct supervisor, and program director summary report. The first 3-year comprehensive longitudinal data reports were compiled for the ELI Work Group in 2014 to be able to conduct a longitudinal retrospective review and analysis.

Evidence 4.1.2.A Describe the process for ongoing faculty evaluation. Faculty evaluation plan must include an annual observation of a mentoring session by the program director/coordinator for all faculty mentors, observation of the program director in their mentoring role (if applicable) by a member of the faculty or administration, and the program participant evaluation of all faculty members.

- **Annual observation of a mentoring session by the program director of faculty** – Assessment is performed by the ELI program director during the virtual office hour webinars, as well as through the monitoring of written questions/responses in the e-community of online courses and onsite sessions with virtual faculty onsite webinars. Feedback is provided informally via email and phone conversations. The program director has additional interactions with faculty annually to discuss their module revisions and review of changes to their content.
- **Observation of the program director in their mentoring role** – This item is not applicable to the program director, as she does not have a mentoring role. In respect to faculty, they offer insights and counsel to fellows during their respective virtual webinar sessions, which gives the program director an opportunity to view faculty in the mentoring role.
- **Fellow-in-training evaluation of all faculty members** – Fellows-in-training complete an ELI module-specific evaluation and Onsite session assessment Forms that include questions relative to curricular content and faculty (see last item). The module and onsite site evaluations are shared by the ELI program director with the faculty, so they may review and consider them as they revise the modules accordingly during the annual review.

- **ELI Work Group review of faculty evaluations and materials** – The ELI Work Group reviews and discusses all faculty assessments received from the previous cohort during its 2 day annual meeting at APTA. Based on the assessments and other criteria, the Work Group provides feedback to the faculty via the program director.
- ELI faculty do not currently participate in a self-assessment process.

Evidence 4.1.2.B Provide blank forms utilized in the faculty evaluation process as outlined in Evidence 4.1.2.A.

(Appendix G: Assessment Forms)

Evidence 4.1.2.C Describe any changes made as a result of faculty evaluations.

ELI faculty are evaluated on an ongoing basis. No ELI faculty have been dismissed from the program to date as a result. Changes made based on faculty evaluations include:

- Online coursework suggested including the e-community (Forum) within the same system rather than using Share Point for faculty. The new learning center (2015) now incorporates the module content, module assessment, e-community for interactions, additional resources/references linked to specific module sections, and provides a link to the virtual webinars for faculty all in the same system.
- References/additional resources are listed and coded in the Learning Center by the specific Module section for ease of retrieval. (2015)
- Added some faculty virtual webinars for each module in 2014 rather than all of the virtual office hours provided by written communication within an e-community. In 2015, all faculty provided at least one of their virtual hours by webinar. The consensus among faculty is that they would be willing to do two virtual sessions of 1.5 hours each and then one session in a synchronous e-community to enable some flexibility in their schedule if they are unable to access their computer with cameras all the time.
- In 2013, the program provided fellows with a list of the required texts for the set of 3 grouped modules, at least 1 month prior to the launch of the online modules to enable fellows to access the texts/references in advance of the modules launch. This change saved time when each module was launched while still enabling the faculty time to update their texts and references with advanced notification.
- Shared with faculty and fellows how much time each module requires on average to complete by sharing contact hours for each module on the ELI website.
- Implemented a new e-community system (2014) that was more robust and included a calendar where all important dates and links could be added for module launch, virtual webinars, deadlines, etc. Easier system to track information for fellows and mentors associated with the orientation and each onsite session.
- Shared specific module content suggestions provided by fellows with ELI Work Group members who provide summary recommendations for each module that are shared by the program director with each faculty during their annual renewal.

- Provided faculty teaching curricular content for each grouping (3 modules) an opportunity to communicate with each other to learn how their module may interface with another module for continuity and to be able to reference another module in their content. All faculty have access to all of the modules as well.
- Revised module 9 provides by adding new content and more optimally connecting this content to what has been learned and applied in modules 1-8, serving also as a capstone module.
- Shared all module evaluation summaries with each faculty member for their consideration, questions, and feedback about the program.

Evidence 4.1.3 Summarize the program’s annual review process of its curriculum and describe any changes made over the recent accreditation period. Describe how all persons involved were notified of substantive changes. For multi-site program, describe how the program assures that the curriculum is being applied consistently across all institutions/organizations. Provide minutes from all meetings over the recent accreditation period.

(Appendix VV: Work Group Minutes)

- During the ELI Work Group’s annual program review meeting, all aspects of the Fellowship are reviewed. Summary evaluations provided by fellows are compiled for each module by cohort and shared with the members of the work group. Based on these evaluations, specific recommendations are identified for curricular content revisions/additions for each module. These suggestions are then shared with each faculty member along with an aggregate summary of the fellow’s feedback about the module. Each faculty member is provided with a customized email that provides a new annual contract, provides requested changes to their module based on evaluations and feedback, item analysis review of posttest assessments to identify any questions that may require revision or rechecking to ensure that content addresses test question, faculty virtual office hours, updating references/resource, and other important aspects of their work. Follow up communication by phone is provided for the purpose of clarification, discussion of recommended changes, and additional considerations and needs of faculty. All 9 modules in the program have had revisions/updates since 2011-2012 to remain contemporary and to reflect the needs of its learners. Additional changes have included updated references/texts, new texts and deletion of texts while remaining sensitive to out-of-pocket costs to fellows.
- When questions arose from the ELI Work Group and program director regarding curricular and module issues, faculty were contacted directly for their input and feedback as a group.
- Fellows raised questions about the module sequence in 2013, which was discussed by ELI Work Group and after careful consideration, the order of the modules remained unchanged. However, the program director shares with fellows which modules will require more time in each group of 3 and how to be able to pace through the modules. Additionally, fellows requested that the program director provide “reminders” through the e-community regarding launch for each module, deadlines for work submission, “hints” with respect to progress made within a module (eg, 50%, nearly complete).
- The ELI program director designated a new position on the ELI Work Group for an ELI Fellow graduate on the ELI Work Group in response to feedback from other Work Group members.

Evaluation of Program Participant from Entry through Graduation

Evidence 4.2.1 Describe the mechanisms for determining the program participant’s initial competence upon entry into the program. Provide blank copies of any evaluation forms utilized in this process.

Initial competence of applicants is determined by the ELI Work Group via an admissions rubric during the application review process. (**Appendix W: Rubric**). The ELI application forms, process, and criteria are reviewed by the ELI Work Group during its annual onsite meeting at APTA in August. The purpose of the review is to determine whether the admissions process gives the work group the information it needs to identify qualified and motivated candidates who have the capacity to succeed in and contribute the goals of the program. (**Appendix P: Application**)

As part of the orientation process, accepted candidates complete the Bolman and Deal assessment instrument. The results identify the individual’s leadership frame: Structural, Human Resource, Political, and Symbolic. The instrument helps the fellows-in-training and their mentors identify areas of strength and weakness before the modules begin. (**Appendix M: Bolman and Deal Instrument**)

Evidence 4.2.2.A Describe the process used to evaluate the program participant’s advancing level of competence consistent with the DRP/DFP.

The module posttest requirements and mentorship discussions are used to determine whether fellows are progressing through the curriculum, as required. (**Appendix L: CEUs**) In addition, fellows-in-training must submit a completed Leadership Project Summary Worksheet, Mentorship Log, and all required assessment forms at designated points in the curriculum. Individuals who do not complete the module posttests or related assessment forms are not permitted to continue onto the next module. (**Appendix S: Expectations**)

Evidence 4.2.2.B Provide performance outcome assessment tools (eg, testing materials, examinations, checklists). These tools must include the operational definitions for all grading scales utilized including pass/fail criteria.

Description: APTA’s method to verify attendance is to assess learning via a comprehensive, multiple-choice posttest assessment that assesses each learning objective at the end of the course. APTA requires fellows-in-training earn a 70% score for each ELI Module posttest assessment to pass and to verify learning. Upon completion of the test, the APTA Learning Center awards CEUs for attendance and achievement of the learning objectives.

Justification of Calculated Hours: The American Physical Therapy Association is approved as an Authorized Provider (#380) by the International Association for Continuing Education and Training (IACET), 1760 Old Meadow Road, Suite 500, McLean, VA 22102. Determination of calculated hours is made by judging the amount of time for presentation of course content, as well as time to complete course posttest. Educational content calculations are based off of amount of time needed to complete each online module as well as readings, journaling assignments, postings and other educational activities as described in the attached outline.

Continuing education units are calculated as follows:

- 15 questions are equal to 30 minutes of continuing education and 25 questions are equal to 60 minutes of continuing education.

- The total number of minutes for the educational content and the time allotted for posttests are calculated and divided by 60. This total is then divided by 10 to obtain the final amount of continuing education units.

The estimated number of minutes for the following module activities are included in the CEU calculation:

- Each Section of the Module
- Required Readings
- Discussion Forum Posting & Virtual Office
- Journaling Assignments, Take Action, Research Activity
- Posttest

The following information for each of the 9 ELI modules is provided in **Appendix L: CEUs**.

- Course Title
- Category
- Number of CEUs awarded
- Level of Audience
- Description
- Learning Objectives
- Course Agenda (including topics and minutes)
- Faculty (speaker) Biography
- Course Outline by Section
- References
- Justification of Calculated Hours (as described above)
- Posttest with Answers (confidential)

Evidence 4.3.1.A Provide the survey that is or will be used to determine if the program graduates have met the goals of the program. Describe the program’s plan to survey its graduates at least once in the immediate 5 year period following completion of the program.

ELI Assessment Forms for Fellows and Supervisors:

- Fellow survey at graduation: <https://survey.vovici.com/se/502D66965E5B9015>
- Supervisor survey at graduation: <https://survey.vovici.com/se/502D66967B554F69>
- Fellow survey, post-graduation <https://survey.vovici.com/se/502D66967D67EFA3>
- Supervisor survey, post-graduation: <https://survey.vovici.com/se/502D669669B9F7AC>
- New: Fellow, 5 year post-graduation: <https://survey.vovici.com/se/502D6696408E6A75>

See also (**Appendix G: Assessment Forms**)

Evidence 4.3.1.B Summarize the information collected from graduates over the recent accreditation period and describe any changes made to the program as a result of this information.

- Each of the annual program director summary reports provided changes made to the program based on graduate’s feedback over the 6-year period. I have attached them for your review along with the new set of program leadership cases that were developed in 2015 that expands the cases and role plays available to better customize to the needs of fellows as well as integrated with curricular content.

- There have been many changes made to the program early on based on fellows' assessments. These include:
 - Providing texts/references needed one month in advance for the modules clustered in groups of 3 prior to each onsite session.
 - Identifying which modules will require more time for each of the modules grouped in 3's.
 - Posting the number of CEUs for each module on the website that provides a time estimate for the number of hours of work required (eg, 4.5 CEUs = 45 hours of work).
 - Moving from synchronous community virtual faculty hours to webinars and scheduling on different days of the week and different times so fellows can attend at least one of the sessions.
 - Formally scheduling monthly webinars (not audio) conference calls of the mentorship groups so that they can see each other when communicating. Using the private mentorship community for discussion purposes more frequently.
 - Creating a fellow graduate e-community (HUB) for sharing information among the fellows as well as APTA.
 - Posting updates about ELI on ABPTRFE website and their Facebook pages.
 - Changing what learners in the program were called from participants to fellows-in-training; graduates are now called fellows.
 - Selecting onsite locations in 3 different geographic areas across the US to enable expenses to be more balanced for fellows located throughout the US. Selecting sites that are within 1 hour of the airport. Selecting locations where there is natural lighting in the rooms, opportunities to network on small groups outside of the plenary room and that could be situated outdoors as well. Finding "retreat" oriented locations for onsite sessions 2 and 3 since session 1 is located in the same place as ELC.
 - Eliciting support by ACAPT and the Education Section at ELC to host an annual breakfast without any room charges. The Education Section pays the full registration for ELC for currently enrolled ELI fellows who are Education Section or ACAPT members in support of the program. They also provide a free table to promote ELI at ELC.
 - Enabling guests to attend the graduation ceremony for ELI fellows (at their costs) in support of those completing the program starting in 2014.
 - Providing communication, expectations, program technologies, and other documents as a part of the orientation process to document as much as possible upon program entry and to be able to refer to throughout the program.
 - Incorporating an initial open-ended question as a part of the orientation process to be posted in the e-community to help facilitate learning about others in the cohort and using the technology.

- Offering greater flexibility in splitting the tuition payment into 2 installments that enable program budgets that begin January 1 or July 1 to access two different academic year budgets to pay for ELI.
- Changing how modules are scheduled by allowing more time for completion where possible. Each module begins the week following the onsite session to allow sufficient time to complete assignments from the onsite session. The first module begins the day after the ELI orientation to allow more time for completion as this module requires more intensive work. Modules end the week before the onsite session to provide time to complete assignments for the onsite session.
- Since the curriculum is now complete, the program director can provide the schedule a year in advance when each module is to be launched to fellows. Obviously the first year while the curriculum was still being developed, this was not feasible.

(Appendix WW: Assessment Post Graduation Year 1-5)
(Appendix XX: Assessment Fellow at Graduation)

APPENDICES

EDUCATIONAL LEADERSHIP INSTITUTE FELLOWSHIP

APPLICATION FOR REACCREDITATION OF
NON-CLINICAL RESIDENCY AND FELLOWSHIP PROGRAMS



ELI FELLOWSHIP ORIENTATION FOR FELLOWS-IN-TRAINING: TWO PART AGENDA

July 5, 2016
2:30-4:30 PM ET

APPENDIX A



ELI ORIENTATION WEBINAR - 1ST HOUR

Tuesday, July 5, 2016

2:30-3:30 pm ET (1:30-2:30 pm CT, 12:30-1:30 pm MT, 11:30 am-12:30 pm PT)

Link will be provided by ELI mentors in group.

Welcome to Your ELI Mentorship Group by Color!

- **ELI Blue: (Mike Emery/Claire Peel)**
- **ELI Orange: (David Lake/Suzanne Reese)**
- **ELI Green: (Diane Jette/Thomas Mayhew)**

AGENDA

- | | |
|---------|---|
| 2:30 pm | Introductions |
| 2:40 pm | Expectations for Mentorship Group |
| 3:00 pm | Questions for Fellows-in-Training <ul style="list-style-type: none">• What is your greatest challenge in your current position or leadership experience?• What is your greatest reward in your current position or leadership experience?• What are you hoping to achieve as a result of participating in ELI? |
| 3:15 pm | Future Meeting Logistics |
| 3:25 pm | Adjourn 1st Hour of Orientation (see next page) |

ELI ORIENTATION WEBINAR - 2ND HOUR

Tuesday, July 5, 2016

3:30-4:30 pm ET (2:30-3:30 pm CT, 1:30-2:30 MT, 12:30-1:30 PT)

<http://apta.adobeconnect.com/r55344288/>

Dial-in Number: 1-888-407-5039

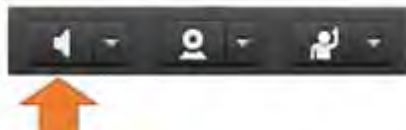
Passcode: 42610998#

INSTRUCTIONS FOR ACCESSING THE WEBINAR IN ADOBE WEBEX

- Copy and paste link above into your browser.
- Click “Guest” and enter your first and last name.
- Join Audio Conference box - Select 1 option below:
 - *“Dial-out [Receive a call from the meeting]”*: Enter your direct phone number and the system will automatically call you (preferred method).
 - *“Dial-in to the Audio Conference via Phone”*: Manually call into webinar using numbers above.



- Do not connect to the audio via your computer microphone and speakers due to audio feedback issues.
- Mute your speakers in Adobe WebEx. Click green speaker icon at top, so that it turns white and is muted.



- Click “Start My Webcam” at the bottom of your screen. You will see a preview screen for your personal webcam. Then, click the “Start Sharing” button so others can see you too.



- If you have not used your computer’s webcam before, please test it in advance to ensure it is properly connected and positioned. Close all other websites and programs as they may interfere with the webinar.



AGENDA

3:30 pm	Welcome and Introductions to Webinar	L Ross
3:35 pm	Fun Introductions for Participants <ul style="list-style-type: none">• What thought or message would you want placed in a fortune cookie?	Fellows
3:45 pm	Overview of ELI Fellowship <ul style="list-style-type: none">• ELI Fellowship Covenant• ABPTRFE Grievance Policy• Clarification of Roles for All Involved in the ELI Fellowship• Overview of the ELI Fellowship Program<ul style="list-style-type: none">○ Orientation○ Modules○ Mentorship Monthly Conference Calls○ Onsite Sessions○ Forms and Documentation○ Required ELI Assessments○ Time Management	L Ross
4:00 pm	Technology Overview <ul style="list-style-type: none">• ELI Communities on APTA Hub (Demo)<ul style="list-style-type: none">○ ELI Program 2016-2017 Community○ 2016-2017 Mentorship Group Community (Blue, Green, Orange)• APTA Learning Center (Demo)• Virtual Office Hours• Questions?	L Ross
4:20 pm	Closing Remarks	Sharon Dunn, PT, PhD, OCS APTA President
4:30 pm	Adjourn	L Ross

ORIENTATION WEBINAR ASSIGNMENTS

Cohort 2016-2017

In preparation for the ELI Fellowship orientation webinar on July 5, please complete the assignments below.

- Be prepared to respond to the 3 questions below during your mentorship group webinar (1st hour).
 - *What is your greatest challenge in your current position or leadership experience?*
 - *What is your greatest reward in your current position or leadership experience?*
 - *What are you hoping to achieve as a result of participating in ELI?*
- Be prepared to respond to the question below during the plenary webinar (2nd hour).
 - *What thought or message would you want placed in a fortune cookie?*
- Review the reference materials provided on the APTA Hub under the “ELI Program 2016-2017” and “ELI Orientation”. Be prepared with questions that you may have during the webinar after reviewing these materials.
- Review the biographies for the ELI mentors and other fellows-in-training located in the “ELI Orientation” folder on the APTA Hub.
- Follow directions to subscribe to immediate notification alerts for 2 Forums in the “ELI Program 2016-2017” community on APTA Hub.
- Verify your information on the “ELI Fellow-in-Training and Mentor Roster: 2016-2017” is accurate and complete. Contact libbyross@apta.org with changes.
- Review the calendar and list of “Required and Recommended Module Readings” for Modules 1, 2, and 3 on the ELI community on the APTA Hub.
- Add your picture to your community profile on the APTA Hub per the instructions in the “ELI Orientation” folder.

REMINDER: The 1st ELI onsite session is scheduled on October 5-6, 2016 and the Education Leadership Conference (ELC) is October 7-9. See the ELI community on the APTA Hub for additional information on all sessions.

1st Onsite Session

October 5-6, 2016 (Wednesday-Thursday)

Travel on Tuesday, October 4.

Pointe Hilton Tapatio Cliffs Resort in Phoenix, Arizona

2nd Onsite Session

March 9-10, 2017 (Thursday-Friday)

Travel on Wednesday, March 8, 2017

Location: TBD

3rd Onsite Session and Graduation

July 12-13, 2017 (Wednesday-Thursday)

Travel on Tuesday, July 11, 2017

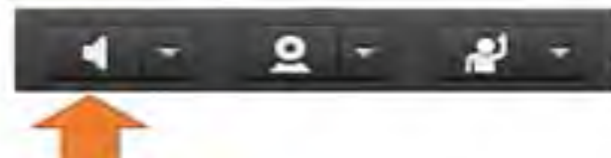
Location: TBD

CONTACT: Please contact Libby Ross, APTA Director of Academic Services and ELI Program Director, at libbyross@apta.org or 800-999-2782, extension 3326, if you have any questions or encounter any issues during the program.



Education Leadership Institute Fellowship

ORIENTATION FOR 2016-2017 COHORT



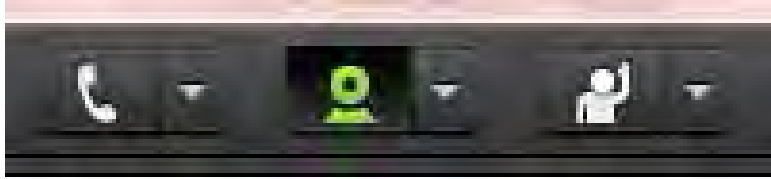


Agenda

- Welcome and Introductions
- Fortune Cookie Exercise
- Overview of ELI Fellowship
- Technical Logistics
- Closing Remarks by APTA President

Webcam Instructions

- Wait for mentorship group color to be called.
- Click the webcam icon to turn your camera back on.



- Click the “**Start Sharing**” button.



- **Unmute** your phone.
- Say your name, institution, and fortune cookie (>30 seconds).





Overview



Goals of the ELI Fellowship Program

Develop physical therapist and physical therapist assistant education program directors with the leadership skills to:

- Facilitate change and improvement in the academic environment of the 21st century.
- Think strategically and creatively to implement solutions in education that respond to the changes and contemporary context in health care and society.
- Engage in public discourse that advances the physical therapy profession.

ELI Fellowship Stakeholders



APTA Board of Directors

The APTA Board is responsible for ensuring that the program advances the strategic goals of the association and provides financial oversight of the program.



American Board of Physical Therapy Residency and Fellowship Education

ABPTRFE provides program oversight to ensure the continued credibility of ELI as an accredited fellowship.

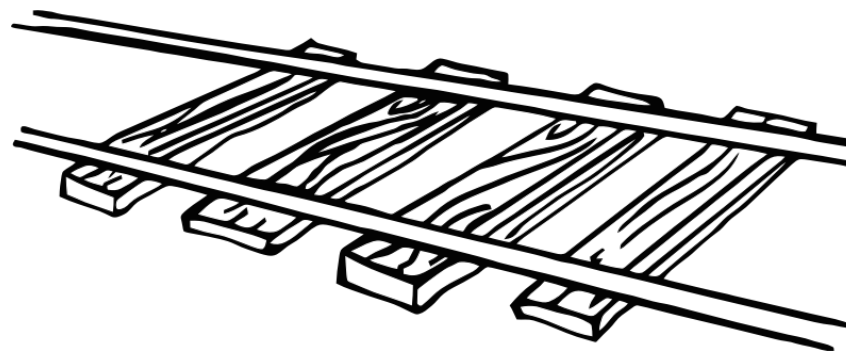


ELI Program Director

ELI Program Director leads and manages all aspects of the Fellowship in coordination with the ELI Work Group and ensures the program's compliance with the provisions of the ABPTRFE Evaluative Criteria and Rules of Practice and Procedure.



Libby J. Ross, MA
Director, Academic Services
American Physical Therapy Association
1111 N. Fairfax Street
Alexandria, VA 22314
703-706-3326 or 800-999-2782, ext. 3326 (toll free)
libbyross@apta.org



ELI Fellowship Work Group

ELI Work Group is responsible for the ongoing oversight and management, implementation, and evaluation of the program including the applicant review, curriculum, selection of faculty and mentors, assessment, and policies and procedures.



Karen E. Abraham, PT, PhD
Professor and
SU Fellow for Academic Excellence
Shenandoah University



Susan Deusinger PT, PhD, FAPTA
Professor Emerita
Washington University School of Medicine



Patricia H Draves, PhD
Vice President for Academic Affairs and
University Dean
University of Mount Union



David G Greathouse, PT, PhD, FAPTA, ECS
Director, Clinical Electrophysiology Services
Texas Physical Therapy Specialists



Merrill R Landers, PT, DPT, PhD, OCS
Chair and Associate Professor
Department of Physical Therapy
University of Nevada, Las Vegas



Carol G Plisner, PT, MA, EdD
Program Coordinator
Physical Therapist Assistant Program
Macomb Community College

ELI Mentors

ELI Mentors are senior PT or PTA education leaders and serve as the cohort facilitators and guides. They provide regular and close interaction with the fellows-in-training through coaching, advising, and thought-provoking questions on an individual and small group level.



Michael Emery, PT, EdD, FAPTA
Emeritus Program Director
Sacred Heart University



Diane Jette, PT, DSc, FAPTA
Associate Chair, Professor
MGH Institute of Health Professions



David Lake, PT, PhD
Retired Department Head
Armstrong State University



Thomas Mayhew, PT, PhD
Immediate Past Chair of Department
Current Program Director of the DPT Program
Virginia Commonwealth University



Claire Peel, PhD, PT, FAPTA
Dean, School of Health Professions
University of North Texas



Suzanne Reese, PT, MS
Associate Dean of Allied Health Services
Tulsa Community College

ELI Faculty

ELI Faculty are content experts who are responsible for reviewing module learning objectives, slides, references, assignments, readings, and posttest assessments. They engage fellows-in-training via an asynchronous discussion forums and conduct virtual office hours to pose and respond to questions, clarify information, discuss assignments, and promote reflective thinking and learning.



Module 1
Personal Leadership and Management
Lynn Gangone, EdD



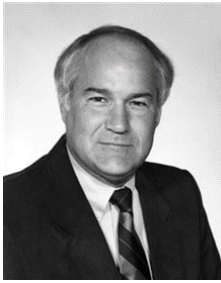
Module 4
Student Affairs
Priscilla "Polly" Moss, MA



Module 7
Resources and Financial Management
Melanie Gehen, MHSA



Module 2
Higher Education, Healthcare Systems,
& Society
Charlotte Royeen, PhD, OTR/L, FAOTA



Module 5
Legal and Policy Issues
Steve Milam, JD



Module 8
Program Development and Outcomes
Assessment



Module 3
Institutional Leadership and Management
Gail Jensen, PT, PhD, FAPTA



Module 6
Human Resource Management
James Kemper, PhD, SPHR



Module 9
Relationships, Influence, and Partnerships
Deborah Waddill, MA, EdD

ELI Expectations for Fellows-in-Training

- Covenant
- Modules
- Virtual Office Hours
- Onsite Sessions
- Leadership Reflections Worksheet
- Leadership Project
- Assessments
- Meetings with Your Dean/Direct Supervisor
- Mentorship Log



ELI Covenant

- Participation and Engagement
- Confidentiality
- Assessment
- Copyright
- Grievance Policy

APTA Education Leadership Institute Fellowship Fellow-in-Training Covenant



This covenant conveys an agreement for the participants, physical therapist and physical therapist assistant educators, about the expectations and professional behaviors in the yearlong Education Leadership Institute (ELI) Fellowship. The Education Leadership Institute Fellowship Work Group used available data, resources, other relevant leadership models, and professional expertise to design this program as a yearlong hybrid (online and face-to-face) model using expert faculty from outside physical therapy and experienced mentors within physical therapy. The intent of this covenant is to frame the boundaries for this program to ensure clarity and transparency for all involved participants. As such:

1. I agree to be an **active** and **engaged** participant in the Education Leadership Institute Fellowship, which includes online discussion forums, e-community on the APTA Hub, webinars, face-to-face session discussions, conference calls, and reflective engagement.
2. I will participate in the ELI Fellowship by maintaining the confidentiality that may result from the sharing of personal or academic institution-specific sensitive information. This information will remain within the boundaries of the program and will not be shared with

ELI Grievance Policy

<http://www.abptrfe.org/Complaints/>



American Board of Physical Therapy Residency and Fellowship Education

Formal Complaint

Name, address, phone, email of Complainant: 	Name of Program:
--	---------------------------------

Relationship of Complainant to Program:

Program Coordinator Didactic Faculty Clinical Faculty Mentor

Program Participant (Resident/Fellow-in-training) Graduate

Other. Please specify: _____

ELI Module Schedule

1.	Personal Leadership and Management	7/5/2016
2.	Higher Education, Healthcare Systems, and Society	8/5/2016
3.	Institutional Leadership and Management	9/5/2016
4.	Student Affairs	10/14/2016
5.	Legal and Policy Issues	11/28/2016
6.	Human Resource Management	1/20/2017
7.	Resources & Financial Management	3/17/2017
8.	Program Development and Outcomes Assessment	4/28/2017
9.	Relationships, Influence, and Partnerships	6/2/2017

What's Included in Each Module?

- **Resource Summary**
- **Required and Recommended Readings**
 - Page numbers and sections referenced in the Module slides
- **Assignments**
 - Stop and Think
 - Activities
 - Discussion Forum Questions
 - Writing Assignments
 - Journal Entries with Reflections

Virtual Office Hours

- 3 Opportunities per module to interact directly with ELI faculty.
- Ask questions about concepts or application of ideas.
- Participate in at least 1 webinar per module.
- Visit community calendar for dates, times, & connection information.
- Turn on your webcam every time.



ELI Onsite Sessions



■ 1st Onsite Session

- October 5-6, 2016
- Pointe Hilton Tapatio Cliffs Resort in Phoenix
- Plan to travel on Tuesday, October 4
- **Wait on ELC meeting registration form for now**

■ 2nd Onsite Session

- March 9-10, 2017
- Plan to travel on March 8
- Location TBD (south)

■ 3rd Onsite Session and Graduation

- July 12-13, 2017
- Plan to arrive on July 11 and depart on July 14
- Location TBD (mid-west)

What happens during the onsite sessions?

- Keynote speaker (1st and 3rd)
- Small and large group discussion and reflection.
- Role play scenarios
- Case studies
- Faculty group webinars (fellows submit questions in advance)
- Leadership reflection worksheet
- Leadership project planning and development.
- Casual and comfortable attire
- Bring your laptop to access documents and assessment forms online.

EDUCATION LEADERSHIP INSTITUTE FELLOWSHIP

Leadership Development Reflections Worksheet**Current Self-Assessment**

(Consider Bolman and Deal Assessment, Self- and Peer Assessments, Mentorship Assessments, ELI Module Content, Institutional Mentors, journal entries, etc)

- **Leadership Strengths**

- **Areas for Leadership Development**

- **Personal Leadership Reflections: How am I changing as a leader?**

Future Personal Leadership Goals

- 1.
- 2.
- 3.

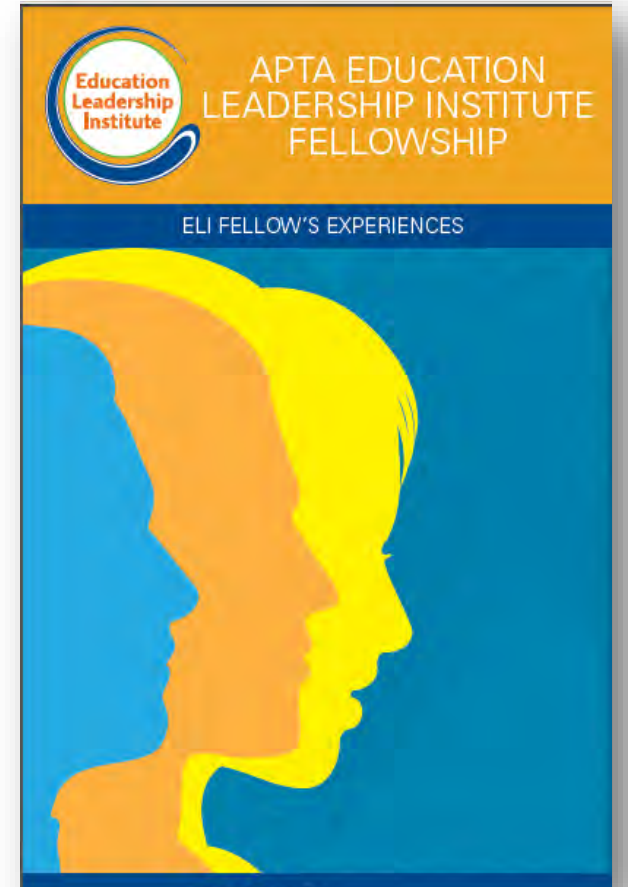
Achieving Personal Leadership Goals

Leadership Reflection Worksheet

- Personal document that promotes ongoing reflection throughout ELI.
- Use to refine and enhance a personal leadership development plan.
- Update and discuss during each onsite session.
- Module 1 will help you begin.
- Bolman and Deal theoretical framework (aka Four Frames Approach)
- Other contemporary leadership theories.
- Determine which ones are most relevant to your leadership journey.

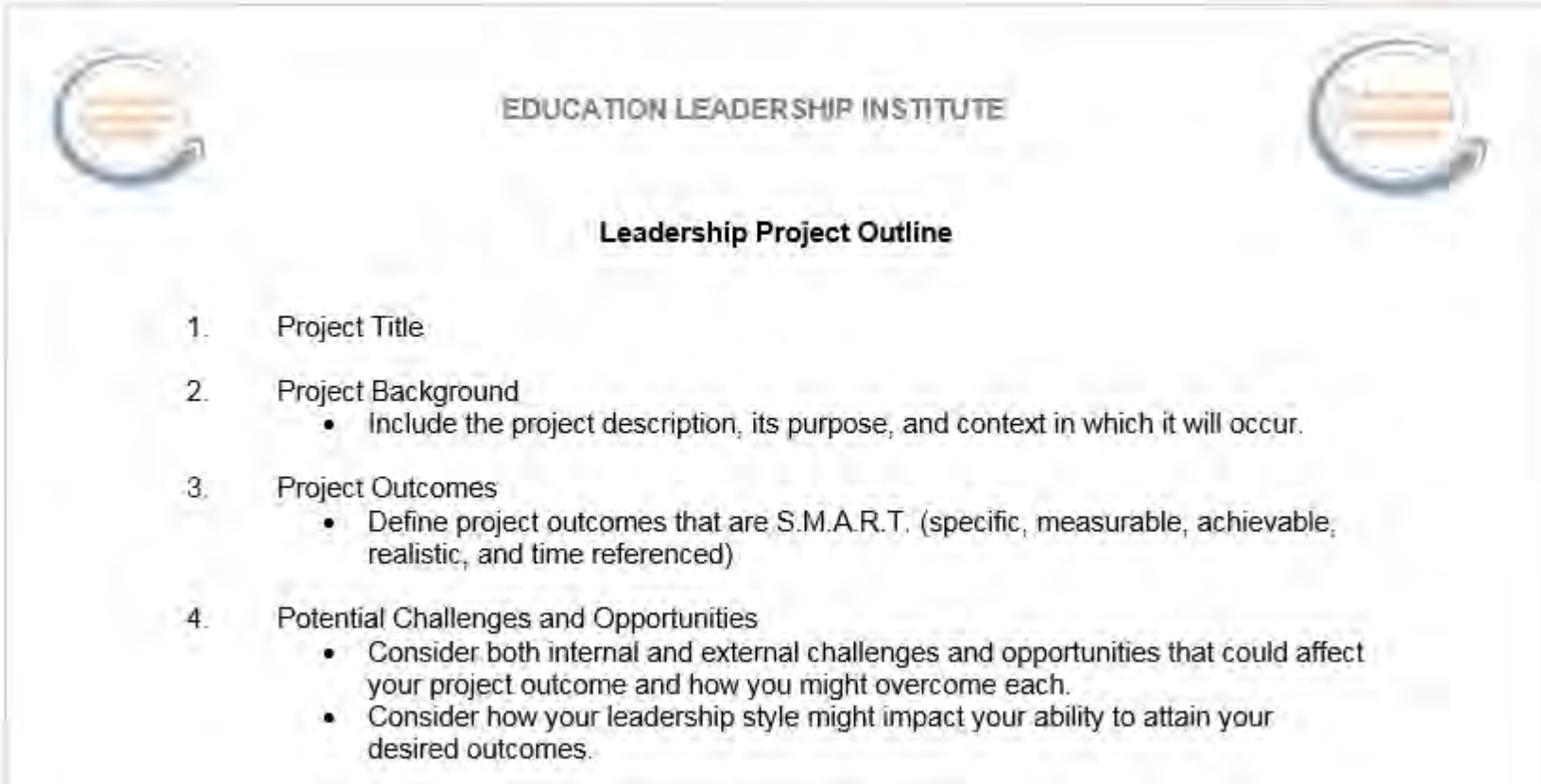
Leadership Project

- Supports and is approved by your institution.
- May include individuals within your institution required to support and enable you to complete the project.
- Must be fully designed during ELI.
- May not be fully implemented during ELI.
- Examples of previous leadership projects will be shared during 1st onsite.



Leadership Project Outline

- Use the outline form to begin thinking about your Leadership Project.
- Work with mentors to develop and revise throughout the program.



The image shows a document titled "EDUCATION LEADERSHIP INSTITUTE Leadership Project Outline". The document is framed by a light blue border and features the ELI logo in the top left and top right corners. The logo consists of a stylized 'E' with three horizontal bars inside a circle. The title "EDUCATION LEADERSHIP INSTITUTE" is centered at the top, and "Leadership Project Outline" is centered below it. The main content is a numbered list of four items, each with a sub-bullet point:

1. Project Title
2. Project Background
 - Include the project description, its purpose, and context in which it will occur.
3. Project Outcomes
 - Define project outcomes that are S.M.A.R.T. (specific, measurable, achievable, realistic, and time referenced)
4. Potential Challenges and Opportunities
 - Consider both internal and external challenges and opportunities that could affect your project outcome and how you might overcome each.
 - Consider how your leadership style might impact your ability to attain your desired outcomes.

Meetings with Your Dean/Direct Supervisor

Arrange for regular meetings with your supervisor throughout ELI.

PURPOSE

- Communicate & share the content and concepts learned.
- Provide progress regarding your leadership development with feedback.
- Provide mentorship for your institution-specific leadership project.

Supervisor will receive a survey after ELI graduation and post 1-year.

Required ELI Assessments

- Admission Survey (done!)
- Posttest Assessments: **Must successfully pass with > 70% score**
- APTA Learning Center Assessment for CEUs
- Post-module Assessments (**Link shared during each onsite session**)
- Onsite Assessments
- Mentorship Assessments: **Self, 2 Mentors, another fellow-in-training**
- Program Assessment at Graduation, plus 1, 3, and 5 years out.

Mentorship Log

- Also known as the “**Mentorship Tracking Spreadsheet**”
- Keep a record of all of your ELI hours in the log on a **weekly** basis.
- ELI form is available on the community Hub (required format).
- Completed form due in July 2017.

1 Education Leadership Institute Fellowship: Fellow-in-Training Mentorship Log: 2016-2017													
2	Onsite Meeting	Module Launch	Dates	Week	Module Assigned Readings (hours)	Module Journal Entries (hours)	Module Activities (eg, Stop and Think, Written) (hours)	ELI Virtual Office Hour Webinars (hours)	ELI Faculty Discussion Forums (hours)	ELI Subgroup Mentorship Conference Calls (hours)	ELI Onsite Meetings (hours)	Meetings/ interactions with institution administration /staff (eg, President, Provost, Dean, HR, Legal Council, Student Affairs, etc) (hours)	Weekly Total
3	Orientation Webinar	1	Jul 3-9, 2016	1									0.0
4			Jul 10-16, 2016	2									0.0
5			Jul 17-23, 2016	3									0.0
6			Jul 24-30, 2016	4									0.0
7		2	Jul 31-Aug 6, 2016	5									0.0

What happens if I fall behind in the schedule?



Technology



<http://communities.apta.org>



<http://learningcenter.apta.org/>


ELI Community

www.apta.org



The screenshot shows the APTA website interface. At the top, a dark teal navigation bar contains links for 'Join/Renew', 'Find a PT', 'APTA Communities', 'Related Organizations', 'Store', 'Login', and 'Profile'. Below this is the APTA logo and the text 'American Physical Therapy Association'. To the right of the logo is a search bar with a 'Search' button. Below the search bar are links for 'Prospective Students', 'Current Students', 'New Professionals', 'PTAs', and 'Educators'. A secondary navigation bar below that contains links for 'About Us', 'Careers & Education', 'Practice & Patient Care', 'Payment', 'Advocacy', 'News & Publications', and 'For the Public'. The main content area features a large image of a person's shoulder with a white callout bubble. To the right of the image is a section titled 'New at PTNow' with the text 'A clinical summary of THA is among the recent additions at PTNow.' and a 'Learn More' button. Further right is a large teal banner with the text 'Join APTA TODAY!' and 'Learn about the benefits of belonging to APTA.' with another 'Learn More' button.

ELI Community – APTA Member Login


Search

American Physical Therapy Association. Prospective Students Current Students New Professionals PTAs Educators

[About Us](#) | [Careers & Education](#) | [Practice & Patient Care](#) | [Payment](#) | [Advocacy](#) | [News & Publications](#) | [For the Public](#)

Home > Login

Login

You have tried to access APTA members-only content or an online form that requires a login or membership. Please login or create an account to continue. If you need further assistance, please contact APTA Member Services at 800/999-2782 or memberservices@apta.org or [Real-Time Live Chat Support - Offline](#)

APTA Members and Registered Users

Member Number, E-Mail or User ID

Password

[Forgot your password?](#)

Remember Me [Login](#) [Learn More](#)

Not a Member? New User?

[Join Now](#) [Learn about membership benefits](#)

OR

[Create an Account](#)

Creating an account allows you to enter registrations and purchases. It doesn't provide member discounts or access to member-only content. First-time APTA members must create an account to use the online registration form.

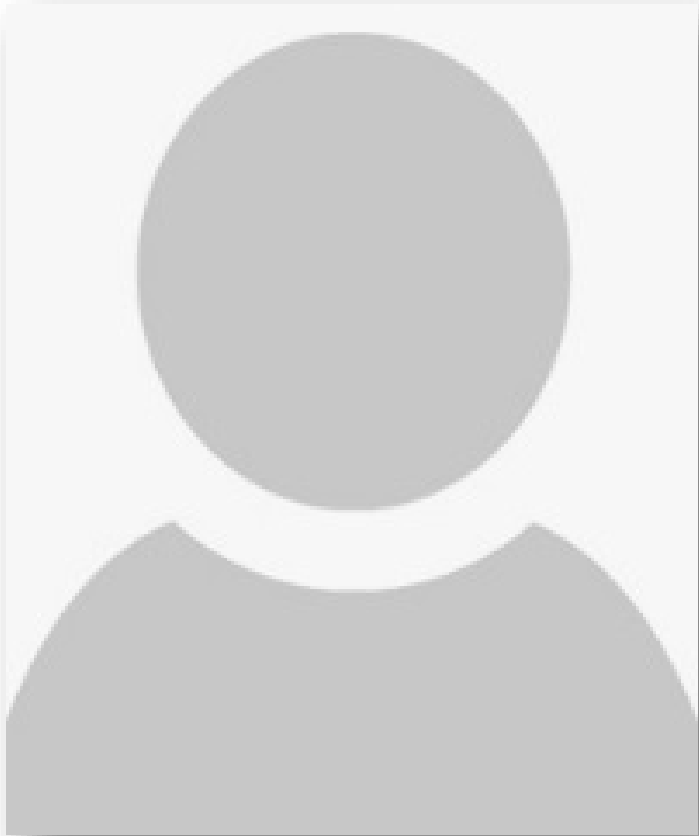
ELI Community on the APTA Hub – Main Screen

The screenshot shows the main interface of 'THE HUB'. At the top left, the title 'THE HUB' is displayed in large blue letters, with the subtitle 'YOUR ACCESS TO APTA COMMUNITIES' below it. The background features a colorful molecular-style graphic of interconnected circles. In the top right corner, user information 'Elisabeth J. Ross, MA - 12:50 PM' is shown, along with 'Help' and 'Logout' links. Below this are 'My Options' and 'My Links' dropdown menus, a search bar with a 'Go' button, and the APTA logo (American Physical Therapy Association).

A dark blue navigation bar contains the following links: Home, Communities (with a dropdown arrow), Forums (with a dropdown arrow), Files, My Favorites, HUB Users, and APTA Home.

The main content area begins with the heading 'WELCOME TO THE HUB!' followed by three large, colored buttons: 'Communities' (green), 'Forums' (orange), and 'Files' (purple). Each button includes an icon, a title, a descriptive sentence, and a 'START NOW' link. An orange arrow on the left side of the image points directly to the 'Communities' button.

ELI Community – Add A Profile Picture




ELI Community – Main Screen

Home Communities ▾ Forums ▾ Files My Favorites HUB Users APTA Home

Communities Home | Admin Options ▾

ELI Program 2016-2017

[Community Home](#) [Actions ▾](#)



Exclusive to participants in ELI for 2016-17 cohort: ELI Fellows-in-Training, ELI Mentors, ELI Fellow Work Group, and ELI Program Director
 The ELI Program 2016-2017 community provides information and resources for those involved in the Education Leadership Institute (ELI) Fellowship. Contact libbyross@apta.org with questions.

▾ Forum

- [ELI Program 2016-2017 Updates](#)
- [ELI Program 2016-2017 Discussions](#)

▾ File Library

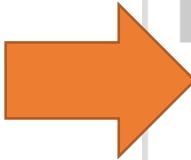
- [Required and Recommended Module Readings](#)
- [Faculty Virtual Office Hours](#)
- [Orientation Webinar](#)
- [First ELI Onsite Session](#)
- [Second ELI Onsite Session](#)
- [Third ELI Onsite Session](#)

Meetings for this Month

M	TU	W	TH	F	SA	SU
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

Community Calendar

- [ELI Orientation Webinar - 1st Hour - Jul 05, 2016](#)
- [ELI Orientation Webinar - 2nd Hour - Jul 05, 2016](#)
- [ELI Module 1 Launches - Jul 06, 2016](#)
- [Module 1 Webinar #1 \(Gangone\) - Jul 19, 2016](#)
- [Module 1 Webinar #2 \(Gangone\) - Jul 25, 2016](#)











ELI Community – Updates Screen

Home Communities ▾ Forums ▾ Files My Favorites HUB Users APTA Home

Forums Home Search Favorite Topics ▾ Posts in Favorites ▾ My Subscriptions Options ▾ Admin Options ▾

ELI Program 2016-2017 Updates

Actions ▾





 ELI Module 2: Required Reading List	0 replies 4 views		Last Post: Elisabeth J. Ross, MA June 20, 2016 09:34 AM
 ELI Orientation Agenda and Assignments	0 replies 6 views		Last Post: Elisabeth J. Ross, MA June 20, 2016 09:29 AM
 ELI Module 3: Required Reading List	0 replies 5 views		Last Post: Elisabeth J. Ross, MA June 20, 2016 09:27 AM
 Next Steps	0 replies 16 views		Last Post: Elisabeth J. Ross, MA May 19, 2016 10:56 AM

About this Topic

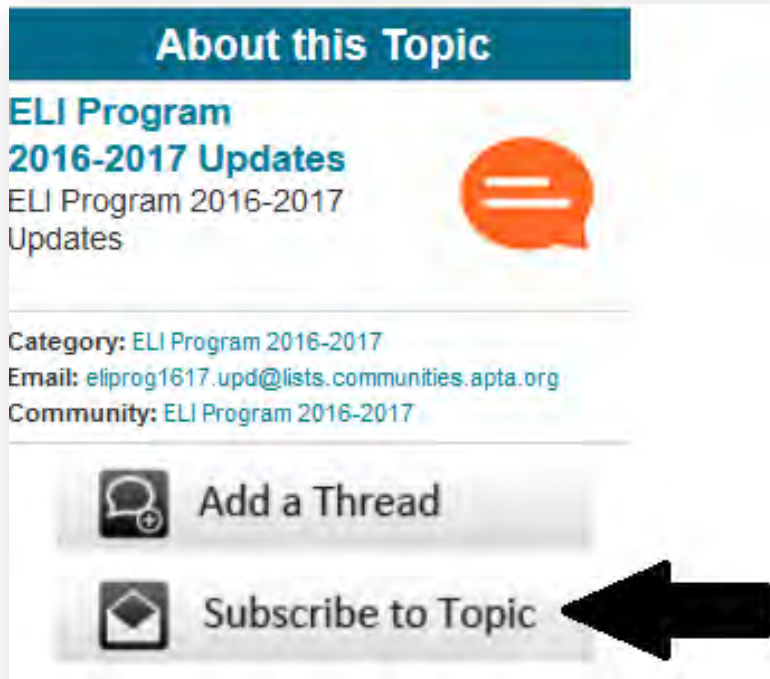
ELI Program 2016-2017 Updates

ELI Program 2016-2017 Updates

Category: [ELI Program 2016-2017](#)
Email: eliprogram2017.upd@lists.communities.apta.org
Community: [ELI Program 2016-2017](#)

-  Add a Thread
-  Favorite
-  Search
-  Mark Topic as Read

Set Alerts for Updates





About this Topic

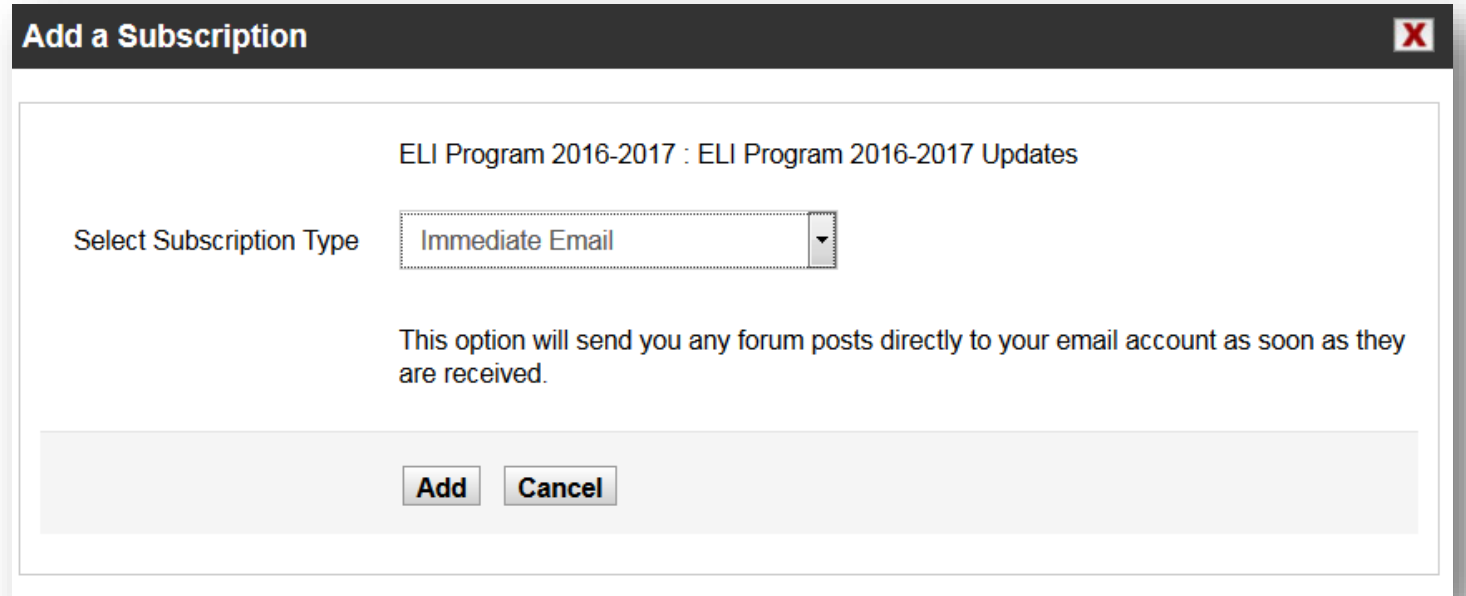
ELI Program 2016-2017 Updates

ELI Program 2016-2017 Updates

Category: ELI Program 2016-2017
Email: eliprogr1617.upd@lists.communities.apta.org
Community: ELI Program 2016-2017

 Add a Thread

 Subscribe to Topic



Add a Subscription

ELI Program 2016-2017 : ELI Program 2016-2017 Updates

Select Subscription Type: Immediate Email

This option will send you any forum posts directly to your email account as soon as they are received.

Add **Cancel**

**All ELI communication will be posted in the Updates thread on the community Hub.
You will no longer receive any ELI announcements via email.**


ELI Community – Main Screen

Home Communities ▾ Forums ▾ Files My Favorites HUB Users APTA Home

[Communities Home](#) | [Admin Options ▾](#)

ELI Program 2016-2017

Community Home Actions ▾



Exclusive to participants in ELI for 2016-17 cohort: ELI Fellows-in-Training, ELI Mentors, ELI Fellow Work Group, and ELI Program Director

The ELI Program 2016-2017 community provides information and resources for those involved in the Education Leadership Institute (ELI) Fellowship. Contact libbyross@apta.org with questions.

▾ Forum

- + 📎 [ELI Program 2016-2017 Updates](#)
- + 📎 [ELI Program 2016-2017 Discussions](#)

▾ File Library

- + 📎 [Required and Recommended Module Readings](#)
- + 📎 [Faculty Virtual Office Hours](#)
- + 📎 [Orientation Webinar](#)
- + 📎 [First ELI Onsite Session](#)
- + 📎 [Second ELI Onsite Session](#)
- + 📎 [Third ELI Onsite Session](#)

Meetings for this Month

M	TU	W	TH	F	SA	SU
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

Community Calendar

- [ELI Orientation Webinar - 1st Hour - Jul 05, 2016](#)
- [ELI Orientation Webinar - 2nd Hour - Jul 05, 2016](#)
- [ELI Module 1 Launches - Jul 06, 2016](#)
- [Module 1 Webinar #1 \(Gangone\) - Jul 19, 2016](#)
- [Module 1 Webinar #2 \(Gangone\) - Jul 25, 2016](#)



ELI Community - Calendar

ELI Program 2016-2017 Calendars

▼ Calendar Options

Calendar:

Calendar Items During:

View As:

Name	Start Time	End Time
ELI Orientation Webinar - 1st Hour	July 5, 2016 - 02:30 PM	July 5, 2016 - 03:30 PM
ELI Orientation Webinar - 2nd Hour	July 5, 2016 - 03:30 PM	July 5, 2016 - 04:30 PM
ELI Module 1 Launches	July 6, 2016 - 12:00 PM	July 6, 2016 - 12:00 PM
Module 1 Webinar #1 (Gangone)	July 19, 2016 - 08:00 AM	July 19, 2016 - 09:30 AM
Module 1 Webinar #2 (Gangone)	July 25, 2016 - 08:30 AM	July 25, 2016 - 10:00 AM
Module 1 Webinar #3 (Gangone)	August 3, 2016 - 08:00 AM	August 3, 2016 - 09:30 AM
ELI Module 2 Launches	August 5, 2016 - 12:00 PM	August 5, 2016 - 12:00 PM
Module 2 Webinar #1 (Royeen)	August 18, 2016 - 12:00 PM	August 18, 2016 - 01:30 PM

ELI Community – Calendar Event Detail

Module 1 Webinar #1 (Gangone)

Calendar:	ELI Program 2016-2017 (Private)
Type:	Private
Title:	Module 1 Webinar #1 (Gangone)
Group:	ELI Program 2016-2017
Owner:	Elisabeth J. Ross, MA
Start:	Jul 19, 2016 08:00 AM America/Eastern
End:	Jul 19, 2016 09:30 AM America/Eastern
Description:	REVISED START TIME! First virtual office hours for ELI Module 1 (Personal Leadership and Management) with Dr. Lynn Gangone on Tuesday, July, 19, 2016 at 8:00 to 9:30 am EDT (7:00-8:30 am CT, 6:00-7:30 am MT, 5-6:30 am PT)
Link:	https://apta.adobeconnect.com/r55344288/
Dial In Number:	1-888-407-5039, Passcode 42610998#
Contact Name:	Libby Ross
Contact Email:	libbyross@apta.org
Subscription Status:	Owner

ELI Community – Calendar Download



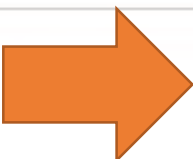
Home Communities ▾ Forums ▾ Files My Favorites HUB Users APTA Home

Calendar Items

[Calendar Home](#) | [All Calendars](#)

ELI Orientation Webinar - 1st Hour

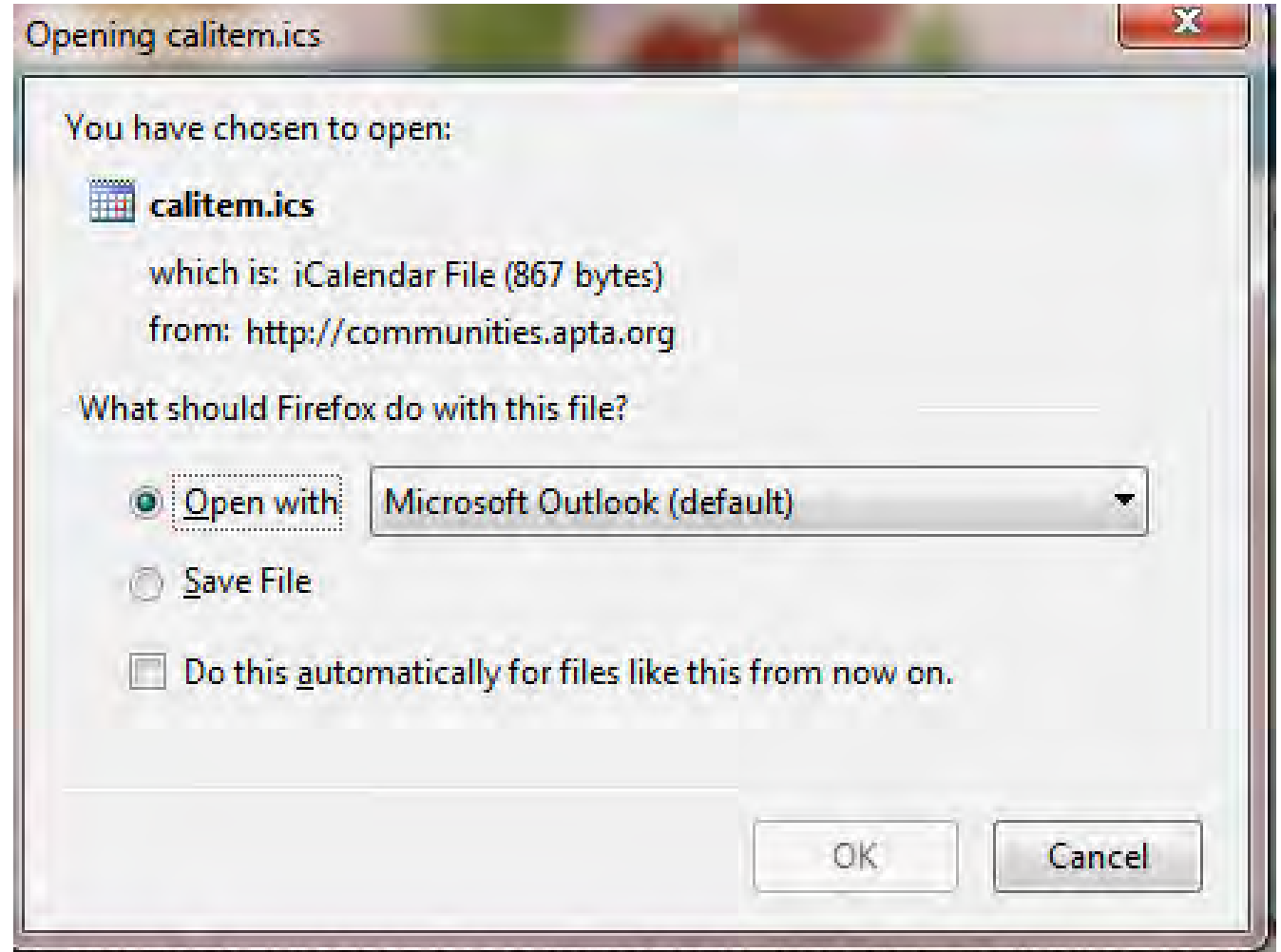
Calendar:	ELI Program 2016-2017 (Private)
Type:	Private
Title:	ELI Orientation Webinar - 1st Hour
Group:	ELI Program 2016-2017
Owner:	Elisabeth J. Ross, MA
Start:	Jul 05, 2016 02:30 PM America/Eastern
End:	Jul 05, 2016 03:30 PM America/Eastern
Description:	During the first hour of the ELI Orientation Webinar you will participate in a call, Google Hangout, or Skype with your assigned mentorship group to get acquainted; become more familiar with the roles and responsibilities of mentors, fellows-in-training, and mentorship groups;



- Actions ▾**

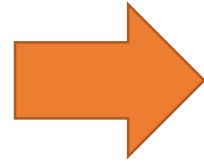
 - Download Calendar Item (.ics)
 - Edit Calendar Item
 - Guests and Subscribers
 - Reminders
 - Move Calendar Item
 - Delete Calendar Item
 - Copy Calendar Item

ELI Community – Calendar Download



ELI Community

Calendar Appointment Download



ELI Orientation Webinar - 1st Hour - Appointment

FILE APPOINTMENT INSERT FORMAT TEXT REVIEW

Appointment Scheduling Assistant Meeting Notes Invite Attendees Options Tags Zoom Apps for Office

Save & Close Delete Actions Show Meeting Notes Attendees Zoom Add-ins

This appointment conflicts with another one on your calendar.

Subject: ELI Orientation Webinar - 1st Hour

Location: |

Start time: Tue 7/5/2016 2:30 PM All day event

End time: Tue 7/5/2016 3:30 PM

Contact Name: Libby Ross
 Contact Email: libbyross@apta.org
 Link: To Be Provided by ELI Mentors in Group
 During the first hour of the ELI Orientation Webinar you will participate in a call, Google Hangout, or Skype with your assigned mentorship group to get acquainted; become more familiar with the roles and responsibilities of mentors, fellows-in-training, and mentorship groups; and to develop group strategies for approaching monthly virtual meetings of your mentorship group throughout the year.

In Shared Folder Calendar Last modified by libbyross@apta.org at 1:18 PM



APTA Learning Center

www.apta.org

Or go directly to...<http://learningcenter.apta.org/>

The screenshot shows the APTA website interface. At the top, there are navigation links: "Join/Renew", "Find a PT", and "APTA Communities". The main header features the APTA logo and the text "American Physical Therapy Association". Below the logo is a navigation bar with the following categories: "About Us", "Careers & Education", "Practice & Patient Care", "Payment", and "Advocacy".

The "Careers & Education" menu is expanded, showing the following options: "Find Jobs", "Courses & Conferences", "About PT/PTA Careers", "Career Management", "Career Development", and "For Educators".

A promotional banner for the "APTA Learning Center" is displayed, featuring a keyboard and a green apple. The text reads: "The [APTA Learning Center](#) is your starting point for personalized learning." Below this, it lists "Other Popular Resources:" with links for "- Search for Courses" and "- Events Calendar". A "Learn More" button is also present.

Two orange arrows are overlaid on the image: one points from the APTA logo down to the "Careers & Education" menu, and the other points from the "Learn More" button back to the "APTA Learning Center" banner.



Learning Center Home Page – My Courses

APTA

My Courses - APTA Learni...

learningcenter.apta.org/Student/MyCourses.aspx

Search

Shopping Cart APTA Home

APTA Learning Center
LEARN WITH THE APTA QUALITY YOU TRUST

THE BEST WAY TO LEARN IS TO
LEARN YOUR WAY™

Search courses...

APTA
American Physical Therapy Association.

Home Catalog Learning Paths/Bundles/Series **My Learning Activities** My Transcript CEU Info Partners Author/Speaker Resources Help

Home My Learning Activities My Courses

My Courses

My Learning Paths and Kits

My Schedule

My Communities

Welcome, Elisabeth Ross

My Course Transcript

Find courses that you have not yet completed on your "Active" tab, below. Courses that you have completed are found by clicking on the "Completed" tab, below. Access a transcript of your completed APTA courses by clicking on the "My Course Transcript" button on the top, right of this page.

ELI Reaccreditation
Page 108

QUICK START

APTA Learning Center – Active Tab

Home / My Learning Activities / My Courses

My Courses

Welcome, Elisabeth Ross My Course Transcript

Find courses that you have not yet completed on your "Active" tab, below. Courses that you have completed are found by clicking on the "Completed" tab, below. Access a transcript of your completed APTA courses by clicking on the "My Course Transcript" button on the top, right of this page.

QUICK START
To take your course, find the title of the course you are searching for in the "Active" tab and click "Start" or "Resume".

Not seeing your recent purchases? To update the page click [here](#).

Additional information about how to use the APTA Learning Center can be found [here](#).

Active Completed





APTA Learning Center – Main Course Screen

ELI 2016-2017: Module 1 – Personal Leadership and Management new

E-LEARNING COURSE

Course Code: LMS-756

Delivery method: Online

Instructor(s): Lynn Gangone, EdD

Show Resources

Forum

Start

Assessment

Details

Status: Not Started

Credits: 4.20 CEUs (42 contact hours/CCUs)

[More CEU Information](#)



ELI 2016-2017: Module 2 - Higher Education, Health Care Systems, and Society new

E-LEARNING COURSE

Course Code: LMS-757

Delivery method: Online

Instructor(s): Charlotte Royeen, PhD

Show Resources

Forum

Assessment

Details

Status: Not Started

Credits: 4.00 CEUs (40 contact hours/CCUs)

[More CEU Information](#)



ELI 2016-2017: Module 3 - Institutional Leadership and Management new

E-LEARNING COURSE

Course Code: LMS-758

Show Resources

Forum

Assessment

Details

Status: Not Started

Credits: 3.60 CEUs (36 contact hours/CCUs)

[More CEU Information](#)





Learning Center – Show Resources

ELI: Module 6: Human Resources Management new
E-LEARNING COURSE

<p>Course Code: LMS-689</p> <p>Delivery method: Online</p> <p>Instructor(s): James E. Kemper, PhD</p> <div style="margin-top: 10px;"> Show Resources Forum </div>	<div style="margin-top: 10px;"> Start Assessment Details </div>	<p>Status: Not Started</p> <p>Credits: 3.90 CEUs (39 contact hours/CCUs)</p> <p style="text-align: right;">More CEU Information</p>
--	---	---



Module may move to “Completed” tab before you have finished the content or assessment.
See community calendar for Module release date.



APTA Learning Center – Show Resources

Education Leadership Institute 2015-16: Module 1
E-LEARNING COURSE

Course Code: LMS-679

Delivery method: Online

Instructor(s): LYNN M. GANGONE, EdD

Resume Assessment Details

Status: Incomplete

Credits: 4.20 CEUs (42 contact hours/CCUs)

[More CEU Information](#)

Hide Resources Forum

Documents

- **Feedback From Others**

Download Document
- **Resources**

Download Document
- **Self Assessment**

Download Document



Learning Center – Discussion Forum

ELI: Module 6: Human Resources Management new E-LEARNING COURSE

Course Code: LMS-689 Start Assessment Details Status: Not Started

Delivery method: Online Credits: 3.90 CEUs (39 contact hours/CCUs)

Instructor(s): James E. Kemper, PhD [More CEU Information](#)

Show Resources Forum





APTA Learning Center Forum

● [General Comments/Questions](#)



[Linda Hawk](#)

01/28/2016 @ 14:10



↳ 4

👁 16

↳ [Reply](#)

✎ [Edit](#)

● [Evaluating an Instructional Claim \(Section 1, slide 31\)](#)



[Linda Hawk](#)

01/28/2016 @ 14:09



↳ 19

👁 56

↳ [Reply](#)

✎ [Edit](#)

● [Analyzing the Sample Curriculum Map \(Section 2, slide 25\)](#)



[Linda Hawk](#)

01/28/2016 @ 14:09



↳ 16

👁 49

↳ [Reply](#)

✎ [Edit](#)

● [Direct and Indirect Measures \(Section 3, slide 26\)](#)



[Linda Hawk](#)

01/28/2016 @ 14:08



↳ 13

👁 43

↳ [Reply](#)

✎ [Edit](#)



APTA Learning Center – Enter Forum Comments

 [Learning Center Administrator](#)

 [Deborah Waddill](#)
06/20/2016 @ 08:08
 0  0  2 [Reply](#) [Edit](#) [Delete](#) 1



Welcome!

Good morning. I hope this welcome finds you well. I will be here online for the next two hours and am eager to entertain discussions under the appropriate threads on any related topic. Welcome!

Dr. Deborah Waddill







APTA Learning Center Forum RESPONSES



[Deborah Waddill](#)

06/20/2016 @ 08:08



Welcome!

Good morning. I hope this welcome finds you well. I will be here on this topic. Welcome!

Dr. Deborah Waddill



[Elisabeth Ross](#)

Test message. Please disregard.



07/04/2016 @ 12:12



To reply to the main discussion thread.



To reply to a comment on the discussion thread.





Learning Center Home Page – Details

ELI: Module 6: Human Resources Management new E-LEARNING COURSE

Course Code: LMS-689

Delivery method: Online


Instructor(s): James E. Kemper, PhD

Show Resources Forum

Start Assessment Details

Status: Not Started

Credits: 3.90 CEUs (39 contact hours/CCUs)
More CEU Information





Learning Center – Details Screen

ELI: Module 5: Legal and Policy Issues

Overview

Education Leadership Institute 2015-16

A comic strip character told his boss that to follow through on the task he was given might result in his being executed for treason, whereupon the boss said for him to talk to the legal department. After a brief reflection on that direction, the employee asked the boss if he could opt for the execution instead. Having to wrestle with legal issues need not be that daunting. Module 5 is not designed, nor will it make any attempt be made, to provide definitive answers to specific legal issues or problems. That is essentially the domain of the legal counsel and ultimately the courts. What Module 5 will attempt, using a case study approach, is to provide some examples of legal issues related to day-to-day academic decision making so that you might be better able to recognize the existence of a legal problem, analytically think through a situation, and seek the necessary assistance and guidance.

Course Code:

LMSE088

Course level: Multiple

Your Progress

Incomplete

Status: 50% complete | Result: --



Resume

Assessment

Evaluation

Lesson	Status	Success	Score
PDF	completed	passed	--
Assessment_ELI_Module 5	-	-	--

Resources

Documents

Websites

• **01. Adobe Connect Directions**

Webinar link directions

Download Document

• **02. REQUIRED Reading list - Resources overview**



Learning Center – Ready to Start the Module

ELI: Module 6: Human Resources Management new E-LEARNING COURSE

Course Code: LMS-689

Delivery method: Online

Instructor(s): James E. Kemper, PhD

Show Resources Forum

Start Assessment Details

Status: Not Started

Credits: 3.90 CEUs (39 contact hours/CCUs)
More CEU Information





Learning Center – Main Module Screen

APTA Learning Center
LEARN WITH THE APTA QUALITY YOU WANT

Education Leadership Institute 2015-16: Module 3

THE BEST WAY TO LEARN IS TO LEARN YOUR WAY™

Save and Close

Page: 1 of 1 85%

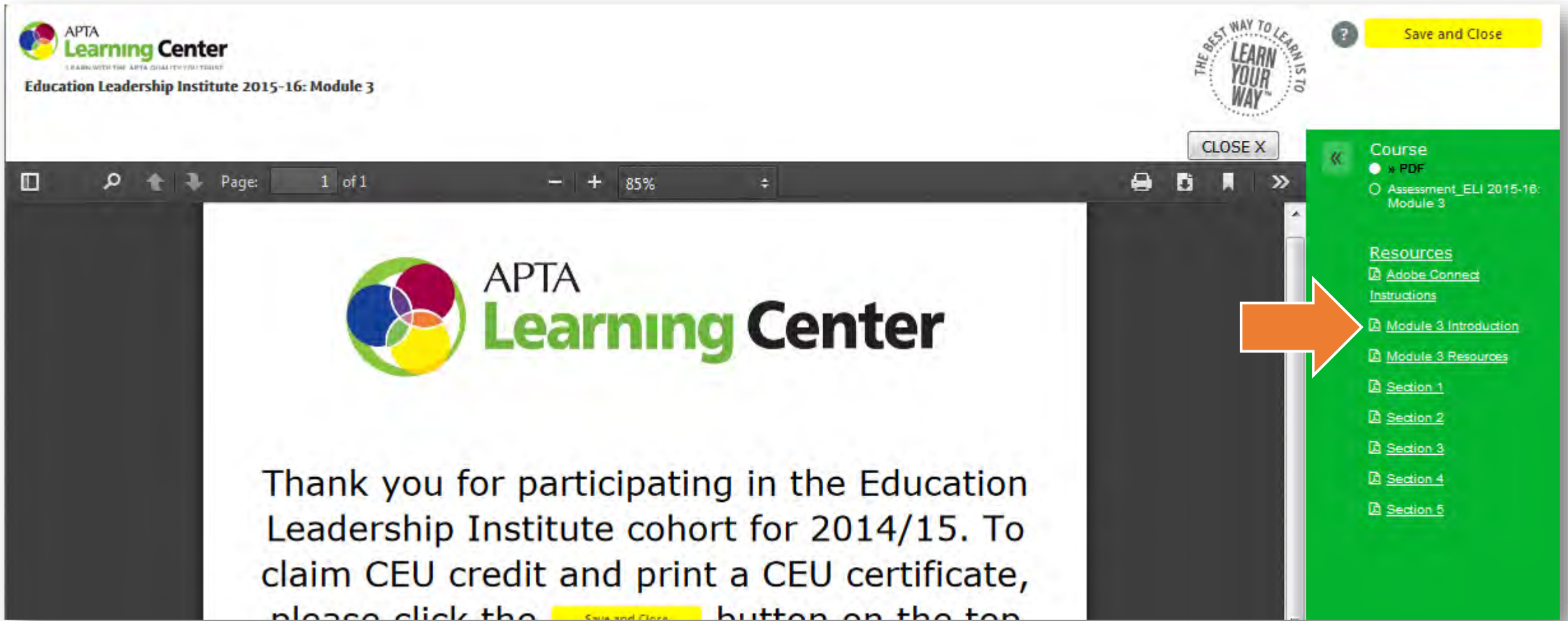
APTA Learning Center

Thank you for participating in the Education Leadership Institute cohort for 2014/15. To claim CEU credit and print a CEU certificate, please click the **Save and Close** button on the top

Course
• PDF
○ Assessment_ELI 2015-16: Module 3

Resources

Learning Center – Open Resources Link



The screenshot displays the APTA Learning Center interface. At the top left, the APTA Learning Center logo is visible, along with the text "Education Leadership Institute 2015-16: Module 3". A yellow "Save and Close" button is located in the top right corner. Below the header, a navigation bar shows "Page: 1 of 1" and a zoom level of "85%". The main content area features the APTA Learning Center logo and a message: "Thank you for participating in the Education Leadership Institute cohort for 2014/15. To claim CEU credit and print a CEU certificate, please click the Save and Close button on the top". A sidebar menu on the right side, highlighted in green, contains the following items: "Course", "PDF", "Assessment_ELI 2015-16: Module 3", "Resources", "Adobe Connect", "Instructions", "Module 3 Introduction", "Module 3 Resources", "Section 1", "Section 2", "Section 3", "Section 4", and "Section 5". An orange arrow points to the "Module 3 Resources" link in the sidebar menu.

Learning Center – Initial View

The screenshot displays the APTA Learning Center interface. At the top, the header reads "Education Leadership Institute 2015-16: Module 1". The main content area shows a presentation slide with the title "Learning Assessment" and the subtitle "Education Leadership Institute 2015-16: Module 1". The APTA Learning Center logo and website URL are visible at the bottom of the slide.

On the left side, there is a sidebar with the APTA Learning Center logo and a "Resources Menu" section. Below the menu, it says "Here is the presentation:" followed by a list of presentation sections:

- Introduction
- Section 1
- Section 2
- Section 3
- Section 4
- Section 5
- Conclusion

On the right side, there is a green navigation panel. At the top, it says "Course" and lists "PDF" and "» Education Leadership Institute 2015-16: Module 1". Below this, there is a "Resources" link. At the bottom of the panel, there is a copyright notice: "© 2015 American Physical Therapy Association. All rights reserved."



Learning Center – Module Slides

The screenshot shows a web browser window with the address bar containing the URL: aptalive.blob.core.windows.net/coursecontent/a4f8a0df-ad61-40e7-8643-fccb2fab4dba/1/story_content/external_files/1_ELIModuk. The browser interface includes a search bar, navigation icons, and a page indicator showing 'Page: 1 of 18'. The main content area displays a slide with a light blue background. The slide title is 'Module 1 – Personal Leadership and Management' in a bold, dark blue font. Below the title is the subtitle 'Introduction and Overview' in a smaller, dark blue font. On the right side of the slide, there is a faint, circular logo with the text 'Edgewood College Leadership Institute' inside it.



Learning Center – Save Progress before Exiting

The screenshot displays the APTA Learning Center interface. At the top left, the logo and text 'APTA Learning Center' are visible, along with 'ELI: Module 6: Human Resources Management'. A circular badge on the right says 'THE BEST WAY TO LEARN IS TO LEARN YOUR WAY™'. A yellow button labeled 'Save and Close' is highlighted with an orange arrow. Below the main content area, a green sidebar contains a table of contents with links to 'Course', 'Resources', and various sections.

APTA Learning Center
 ELI: Module 6: Human Resources Management

Page: 1 of 1 | 85%

APTA Learning Center

2015-2016 Education Leadership Institute

In order to successfully complete this course, you must

Course

- PDF
- Assessment_ELI2015-16: Module 6

Resources

- 01. Adobe Connect Instructions
- 02. REQUIRED Reading List - Resources Overview
- 03. Intro
- 04. Section 1: History and Evolution of Higher Education HR Mgmt
- 04a. Section 1 and Section 9: 23 potential functions of a human



Learning Center – Resuming the Module

ELI: Module 5: Legal and Policy Issues **E-LEARNING COURSE**

Course Code: LMS-688


Delivery method: Webinar

[Show Resources](#) [Forum](#)

[Resume](#) [Assessment](#) [Details](#)

Status: Incomplete

Credits: 4,40 CEUs (44 contact hours/CCUs)
[More CEU Information](#)



Check the “Completed” tab on the main Learning Center screen, if module not found.



Learning Center – Ready for Module Posttest

Education Leadership Institute 2015-16: Module 1

E-LEARNING COURSE

Course Code: LMS-679

Delivery method: Online

Instructor(s): LYNN M. GANGONE, EdD

Resume

Assessment

Details

Status:

Incomplete

Credits:

4.20 CEUs (42 contact hours/CCUs)

[More CEU Information](#)

Show Resources

Forum



Contact ELI Program Director for Help



703-706-3326 or 800-999-2782, ext. 3326
libbyross@apta.org

Remarks by APTA President, Sharon Dunn



Sharon L. Dunn, PT, PhD, OCS
Shreveport, LA

Your ELI Leadership Journey Has Begun!





Module 1 – Personal Leadership and Management

Module Resources



Education Leadership Institute
Module 1: Personal Leadership and Management

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Education Leadership Institute
Module 1: Personal Leadership and Management

Outcome Objectives

After completing this module, you should be able to:

1. Explain and apply contemporary leadership theories, principles, and values that are relevant to your personal leadership development.
2. Identify and explain management strategies that are grounded in leadership principles, ones that you can apply in institutional settings, strengthening your capacity to navigate the environment of higher education.
3. Demonstrate leadership behaviors that are authentic, grounded in institutional and professional values, and achieve the intended results.
4. Justify and explain decisions and actions to others based on an understanding of the academic administrator's responsibilities, a sense of duty to represent faculty and students, and alignment congruent with institutional values, priorities, and directives.
5. Apply methods of management and principles of leadership, and the use of reflection, to navigate the changing higher education environment, empowering you to better respond to the opportunities, threats, and challenges inherent in the contemporary higher education environment.



Education Leadership Institute
Module 1: Personal Leadership and Management

Faculty Biography



LYNN M. GANGONE, EdD
VICE PRESIDENT, LEADERSHIP PROGRAMS

Lynn M. Gangone, EdD joined the American Council on Education (ACE) in April 2015 as vice president for leadership programs. She is a seasoned higher education leader with both campus- and association-based senior leadership experience and is responsible for guiding the Council's suite of programming for current and future higher education leaders. She has conducted research and published in a number of areas, including women's leadership and advancement and nonprofit organizational viability and change management.

Gangone most recently was the dean of Colorado Women's College at the University of Denver (DU), and also was a clinical professor of higher education at DU's Morgridge College of Education. Prior to DU, she was a visiting professor at the George Washington University (DC) Graduate School of Education and Human Development and a strategic planning consultant with Kaludis Consulting.



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Gangone has served higher education as a faculty member, administrator, association executive, lobbyist and policy analyst, and is a former vice president of the Maryland Independent College and University Association.

She received an EdD and MEd in higher and postsecondary administration from Columbia University (NY); an MS and CAS in counseling psychology from the University at Albany, State University of New York; and a BA in political science from The College of New Rochelle (NY). She was a member of the Class of 2010 at the Harvard Institute for Educational Management (MA). Dr Gangone was previously honored as one of the Top 25 Most Powerful Women in Colorado (Colorado Women’s Chamber of Commerce), as well as one of the 2013 “Women Making History” (Colorado Black Women for Political Action). Other honors include Woman of Distinction (Girl Scouts of Colorado) and the University of Denver Center for Multicultural Excellence’s “Outstanding Achievement in Multicultural Excellence” award. In addition, she has been honored by the American College Personnel Association (ACPA) as a Diamond Honoree and by The College of New Rochelle with the Ursula Laurus citation. To learn more about Lynn Gangone, visit <http://www.acenet.edu/news-room/leadership-bios/Pages/Lynn-M-Gangone.aspx>.



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Faculty Virtual Office Hours - Module 1

- **Tuesday, July 21, 2015; 7:00 – 9:00 pm EDT** (4:00 -6:00 PT; 5:00 – 7:00 MT; 6:00 – 8:00 CT)
- **Wednesday, July 29, 2015: 7:00 – 9:00 pm EDT** (4:00 -6:00 PT; 5:00 – 7:00 MT; 6:00 – 8:00 CT)
- **Tuesday, August 4, 2015; 7:00 – 9:00 pm EDT** (4:00 -6:00 PT; 5:00 – 7:00 MT; 6:00 – 8:00 CT) (*Live Adobe Webinar Session*)

Readings

Required Readings

- Bolman LG, Deal TE. *Reframing Organizations: Artistry, Choice, and Leadership*. 4th ed. San Francisco, CA: Jossey-Bass; 2008. (Sections 2 and 3)
- Bolman LG, Gallos J. *Reframing Academic Leadership*. San Francisco, CA: Jossey-Bass; 2011. (Sections 4 and 5)
- Kouzes J, Posner BZ. *The Leadership Challenge: How to Make Extraordinary Things Happen in Organizations*. 5th Edition. San Francisco, CA: Jossey-Bass; 2012. (Section 3) *Also required for Module 3.*
- Madsen SR. *On Becoming a Woman Leader: Learning from the Experiences of University Presidents*. San Francisco, CA: Jossey-Bass; 2008. (Section 5)
- Meyerson DE. *Tempered Radicals: How Everyday Leaders Inspire Change at Work*. Boston, MA: Harvard Business School; 2003. (Section 3)
- Northouse P. *Leadership: Theory and Practice*. 6th ed. Thousand Oaks, CA: Sage Publications; 2013. (Section 1)
- Palmer PJ. *Let Your Life Speak: Listening for the Voice of Vocation*. San Francisco, CA: Jossey-Bass; 2000. (Sections 1, 3 and 4)



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- Whitney D, Trosten-Bloom A, Rader K. *Appreciative Leadership*. New York, NY: McGraw-Hill; 2010. (Section 1)

Recommended Readings

- Bolman LG, Deal TE. *Leading with Soul: An Uncommon Journey of Spirit, Revised*. 3rd ed. San Francisco, CA: Jossey-Bass; 2011.
- Collins J. *Good to Great*. New York, NY: HarperCollins; 2001.
- Collins J. *Good to Great and the Social Sectors*. Boulder, CO: Jim Collins; 2005.
- Gardner JW. *On Leadership*. New York, NY: The Free Press; 1990.
- Heifetz RA. *Leadership Without Easy Answers*. Cambridge, MA: Harvard University Press; 1994.
- Hughes R, Ginnett R, Curphy G. *Leadership: Enhancing the Lessons of Experience*. 5th ed. New York, NY: McGraw-Hill; 2010.
- Wheatley MJ. *Leadership and the New Science: Learning about Organization from an Orderly Universe*. San Francisco, CA: Berrett-Koehler Publishers; 1992.

Definitions

Appreciative Inquiry: The cooperative search for the best in people, their organizations, and the world around them. It involves systematic discovery of what gives a system “life” when it is most effective and capable in economic, ecological, and human terms. AI involves the art and practice of asking questions that strengthen a system’s capacity to heighten positive potential. It mobilizes inquiry through crafting an “unconditional positive question” often involving hundreds or sometimes thousands of people. From Cooperrider DL and Whitney D, “Appreciative Inquiry: A positive revolution in change.” In P Holman P and T Devane (eds.), *The Change Handbook*, San Francisco, CA: Berrett-Koehler Publishers, Inc; 1999: 245-263. (Section 1)

Appreciative Leadership: Appreciative leadership is the relational capacity to mobilize creative potential and turn it into positive power—to set in motion positive ripples of confidence, energy, enthusiasm, and performance—to make a positive difference in the world.
 (Section 1)



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Frames: A consolidation of major schools of organizational thought into four perspectives. They can be considered as mental maps to read and negotiate a territory, windows to broaden perspective, and tools to help with navigation. In many ways the frames can constitute a belief system and can be applied to all kinds of situations and relationships. Bolman and Deal (2008) use “frames.” This is referred to throughout the module as The Four Frame Approach. (Section 2)

Participant-Observer: What all the leaders have in common is the capacity to be participant-observers—to watch and observe people throughout all aspects of their professional lives, and then make a set of decisions about “what they wanted to do based on these observations” (Madsen SR. *On Becoming a Woman Leader: Learning from the Experiences of University Presidents*. San Francisco, CA: Jossey-Bass; 2008: 182.) (Section 5)

Tempered Radicals: Tempered radicals are individuals who operate on a fault line. They are organizational insiders who contribute and succeed in their jobs. At the same time, they are treated as outsiders because they represent ideals or agendas that are somehow at odds with the dominant culture... To varying extents, they feel misaligned with the dominant culture because their social identities ... or their values and beliefs mark them as different from the organizational majority. (Meyerson DE. *Tempered Radicals: How Everyday Leaders Inspire Change at Work*. Boston, MA: Harvard Business School; 2003.) (Section 3)



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Module 1: Personal Leadership and Management

Assignments/Activities Summary Checklist

Overall

✓ Checklist

Directions: Verify that you have completed the following activities by the end of Module 1.

- Completed the assigned readings and taken the time to engage in additional readings when able.
- Completed each of the assigned questions related to the Outcome Objectives as fully and completely as capable.
- Reflected on your personal goals as an ELI fellow-in-training. What do *you* want your ELI Fellowship experience to be, and what do you want out of this experience?
- Considered your “*Achilles heel*” or “*career derailer(s)*”— ways in which you unconsciously sabotage your own leadership and management capacities.
- Set up a “*Lessons Learned*” folder for your use throughout the ELI Fellowship. Does your folder include assignments, personal reflections, a comment from a fellow participant that produced an “a-ha” moment for you?

Introduction

- ✓ Required Activity: Leadership Assessments (slide 16)
- ✓ Discussion Forum: Your Thoughts? (slide 17)

Section 1 – Personal Leadership and Management (PLM)

- ✓ Stop and Think: What is Leadership? (slide 5)
- ✓ Stop and Think: Definition of Leadership (slide 11)
- ✓ Journaling Activity: 5 Shadows (slide 23)
- ✓ Activity: Written Leadership Strategy (slide 24)

Section 2 – Management Strategies

- ✓ Activity: Bolman and Deal’s Leadership Orientations Quiz (slide 4)
- ✓ Discussion Forum Activity: Discussing Your Results (slide 5)
- ✓ Journaling Activity: Applying the Frames (slide 17)
- ✓ Writing Activity: Leadership Strategy (slide 19)



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Section 3 – Leadership Behaviors

- ✓ Stop and Think: Reflecting on Your Leadership (slide 3)
- ✓ Stop and Think: Tempered Radicals and You (slide 10)
- ✓ Writing/Collaborative Activity: Personal Case Study Shared with a Mentorship Group Partner (slide 12)

Section 4 – Institutional Values, Priorities, and Directives

- ✓ Stop and Think: Vocation and Authenticity —“A Life Divided No More” (slide 5)
- ✓ Written Activity: Theories-in-Use (slide 16)
- ✓ Written Activity: Updating Your Leadership Reflections (slide 17)

Section 5 – Application of Leadership and Management to Change

- ✓ Written Activity: Become a Participant-Observer (slide 7)
- ✓ Group Activity, Part 1/ Discussion Forum: Reframing Leadership Challenges (slide 13)
- ✓ Group Activity, Part 2/ Discussion Forum: Reframing Leadership Challenges (slide 14)
- ✓ Written Activity: Develop an Action Plan (slide 15)



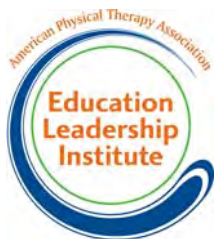
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References

- Kouzes JM, Posner BZ. *The Leadership Challenge: How to Make Extraordinary Things Happen in Organizations*. 5th Edition. San Francisco, CA: Jossey-Bass; 2012.
- Covey SMR. *The Speed of Trust: The One Thing That Changes Everything*. New York, NY: Simon and Schuster Free Press; 2008.
- Fisher R, Ury W. *Getting to Yes: Negotiating Agreement Without Giving In*. Random House. 2012.
- Palmer P. *Leading from Within: Out of the Shadow, Into the Light*. In JA Conger, *Spirit at Work*. San Francisco, CA: Jossey-Bass; 1994.



Module 2:
**Higher Education, Health Care Systems,
and Society**
Module Resources



Education Leadership Institute
Module 2: Higher Education, Health Care Systems, and Society

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Module 2: Higher Education, Health Care Systems, and Society

Learning Outcomes

After completing this module, you should be able to:

1. Differentiate among types of higher education institutions and evaluate the relationship between type of institution and your concomitant role as an academic leader.
2. Explore mechanisms of oversight in higher education and analyze their impact on and importance to physical therapy education.
3. Evaluate the influence of major trends and issues in health care on physical therapy education.
4. Evaluate the influence of major trends and issues in society on physical therapy education.



Education Leadership Institute
Module 2: Higher Education, Health Care Systems, and Society

Faculty Biography



Dr. Charlotte Royeen received her BS degree in Occupational Therapy from Tufts University, her MS in Occupational Therapy from Washington University in Saint Louis, and her PhD in educational research and evaluation from Virginia Polytechnic Institute and State University (VA Tech). She has worked in the federal government, as a private contractor and as a consultant to business and industry.

She started her academic career at Howard University in Washington, DC. She has served as a faculty and administrator at Shenandoah University in Winchester, VA, and Creighton University in Omaha, NE. Royeen previously served as Dean of the Edward and Margaret Doisy College of Health Sciences at Saint Louis University for nearly a decade and full professor in the department of occupational science and occupational therapy. Currently, Dr Royeen is Dean, Rush University Medical Center, College of Health Sciences and serves as an external member on the Commission for Accreditation in Physical Therapy Education (CAPTE) and as a Public Member of the Commission on Dental Education.

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Education Leadership Institute
Module 2: Higher Education, Health Care Systems, and Society

Virtual Office Hours - Module 2

- **Saturday, August 22, 2015;** 10:00 am – 12:00 pm CDT (11:00 am – 1:00 pm EDT; 9:00 – 11:00 pm MDT; 8:00 – 10:00 am PDT)
- **Tuesday, September 8, 2015;** 7:00 – 9:00 pm CDT (Live Adobe WebX Webinar)
- **Thursday, September 17, 2015;** 7:00 – 9:00 pm CDT

Required Readings

- Sullivan WM, Rosin MS. *A New Agenda for Higher Education: Shaping a Life of the Mind for Practice*. The Carnegie Foundation for the Advancement of Teaching. San Francisco, CA: Jossey Bass; 2008. (Section 1)
- Hamilton NW, Gaff JG. *The Future of the Professoriate: Academic Freedom, Peer Review, and Shared Governance. Intentional Leadership in the New Academy*. Washington, DC: Association of American Colleges and Universities; 2009. (Section 2) (Available from the Association of American Colleges and Universities (202-387-3760): www.aacu.org)
- Davidson SM. *Still broken: Understanding the US Health care system*. Stanford, CA: Stanford University Press; 2010. (Section 3)
- Berwick DM, Nolan TW, Whittington J. The Triple Aim: Care, Health, and Cost. *Health Affairs*, 2008; 27(3):759-769. (Section 3)
<http://content.healthaffairs.org/content/27/3/759.full.pdf+html>
- Shrestha LB, Heisler EJ. *The Changing Demographic Profile of the United States: Congressional Research Service*. Washington, DC: CRS Report for Congress; 2010. (Section 4)

Recommended Readings (optional)

- Shi L, Singh DA. *Delivering Healthcare in America: A Systems Approach*. Burlington, MA: Jones Bartlett; 2015.



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Definitions

The faculty acknowledges Chetna Sethi for her assistance in the development of this glossary and in appreciation of her work!

Academic freedom

The concept that teachers are entitled to full freedom in research and in the publication of the results; teachers are entitled to freedom in the classroom in discussing their subject; college and university teachers are citizens, members of a learned profession, and officers of an educational institution. When they speak or write as citizens, they should be free from institutional censorship or discipline.

Affordable Care Act (ACA)

Affordable Care Act was passed by the 11th Congress and signed by President Obama March 23, 2010. On June 28, 2012, the Supreme Court ruled to uphold the law as constitutional based upon the federal government's authority to levy a tax. This act is the current foundation of health care reform in the US.

Ambiguity

The quality or state of using a word or expression that can be understood in 2 or more possible ways.

Associates colleges/community colleges

Includes institutions for which all degrees are at the associate's level, or where bachelor's degrees account for less than 10 percent of all undergraduate degrees. Excludes institutions eligible for classification as Tribal Colleges or Special Focus Institutions.

Autonomy

A concept found in moral, political, and bioethical philosophy. Within these contexts, it refers to the capacity of a rational individual to make an informed, un-coerced decision. In moral and political philosophy, autonomy is often used as the basis for determining moral responsibility for one's actions.

Baccalaureate colleges

Includes institutions for which baccalaureate degrees represent at least 10 percent of all undergraduate degrees and where fewer than 50 master's degrees or 20 doctoral degrees were awarded during the update year.

Benchmark

A standard by which others may be measured or judged.



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Board of Directors

A body of elected or appointed members who jointly oversee the activities of a company or organization. The Board of Directors sometimes has a different name, such as Board of Governors, Board of Managers, Board of Regents, Board of Trustees, Board of Visitors, or Executive Board.

Body or area of knowledge

Term used to represent the complete set of concepts, terms, and activities that make up a professional domain, as defined by the relevant professional association.

Bundling

Marketing technique of offering 2 or more complementary goods or services together as a package deal. Bundled items are sold at a price attractively lower than the total of their individual selling prices.

Community

A unified body of individuals with common interests in a particular area; a group of people with a common characteristic; or a body of persons of common and especially professional interests scattered through a larger society.

Community engagement

The collaboration between institutions of higher education and their larger communities (local, regional/state, national, global) for the mutually beneficial exchange of knowledge and resources in a context of partnership and reciprocity.

Competencies

Identified behaviors, knowledge, skills, and abilities that directly and positively affect the success of employees and organizations.

Critical thinking

The intellectually disciplined process of actively and skillfully conceptualizing, applying, analyzing, synthesizing, and/or evaluating information gathered from, or generated by, observation, experience, reflection, reasoning, or communication, as a guide to belief and action. In its exemplary form, it is based on universal intellectual values that transcend subject matter divisions: clarity, accuracy, precision, consistency, relevance, sound evidence, good reasons, depth, breadth, and fairness.

Doctoral granting institutions

Includes institutions that awarded at least 20 research doctoral degrees during the update year (excluding doctoral-level degrees that qualify recipients for entry into professional practice, such as the JD, MD, PharmD, DPT). Excludes Special Focus Institutions and Tribal Colleges.

Due process

Legal principle that the government must respect all of the legal rights that are owed to a person according to the law. Due process holds the government subservient to the law of the land protecting individual persons from the state. When a government harms a person without following



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the exact course of the law, it constitutes a due process violation that offends against the rule of law.

Fiduciary responsibility

Standard of conduct and trust above that of a stranger or of a casual business-person. A fiduciary must avoid "self-dealing" or "conflicts of interests" in which the potential benefit to the fiduciary is in conflict with what is best for the person who trusts him/her/it.

Foundations

May be legal categorizations of nonprofit organizations, or sufficient preliminary evidence for the admissibility of further evidence.

Health disparities

Differences between groups of people. These differences can affect how frequently a disease affects a group, how many people get sick, or how often the disease causes death. Many different populations are affected by disparities. These include racial and ethnic minorities, residents of rural areas, women, children, the elderly, and people with disabilities.

Health information technology

Includes the use of electronic health records (EHRs) instead of paper medical records to maintain people's health information. Health IT enables health care providers to better manage patient care through secure use and sharing of health information.

Health insurance

Insurance against the risk of incurring medical expenses among individuals. By estimating the overall risk of health care expenses among a targeted group, an insurer can develop a routine finance structure, such as a monthly premium or payroll tax, to ensure that money is available to pay for the health care benefits specified in the insurance agreement. The benefit is administered by a central organization such as a government agency, private business, or not-for-profit entity.

High Research Extensive

Indicates universities that engage in extensive research activity. In the old nomenclature, these were known as Research I.

Higher education

Stage of learning that occurs at universities, academies, colleges, seminaries, and institutes of technology. Higher education also includes certain collegiate-level institutions, such as vocational schools, trade schools, and career colleges that award academic degrees or professional certifications. Also referred to as post-secondary, tertiary, or third-level education.

Identity

The distinguishing characteristic or personality of an individual.

Interpretation

A particular adaptation or version of a work, method, or style.



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Learned society

Organization under which scholars come together to produce and promote knowledge. Learned societies are dedicated to publishing work in newsletters, magazines, and journals related to their disciplines or areas of study. They hold regular conferences at which members present and discuss their current research.

Liberal Arts College

A college with a primary emphasis on undergraduate study in the liberal arts and sciences.

Liberal education

An approach to learning that empowers individuals and prepares them to deal with complexity, diversity, and change. It provides students with broad knowledge of the wider world (eg, science, culture, and society) as well as in-depth study in a specific area of interest.

Master's colleges and universities

Generally include institutions that awarded at least 50 master's degrees and fewer than 20 doctoral degrees during the update year. Excludes Special Focus Institutions and Tribal Colleges.

Medication reconciliation

The process of avoiding inadvertent inconsistencies across transitions in care by reviewing the patient's complete medication regimen at the time of admission, transfer, and discharge and comparing it with the regimen being considered for the new setting of care.

Mission statement

A formal, short, written statement of the purpose of a company or organization. The mission statement should guide the actions of the organization, spell out its overall goal, provide a sense of direction, and guide decision-making.

Moral hazard

Occurs when a party insulated from risk behaves differently from how it would behave if it were fully exposed to the risk. Moral hazard arises because an individual or institution does not take the full consequences and responsibilities of its actions and therefore has a tendency to act less carefully than it otherwise would, leaving another party to hold some responsibility for the consequences of those actions.

Narrative

The representation in art of an event or story; or an example of such a representation.

National accreditation agencies

Agencies that accredit post-secondary programs that are vocational, technical, and career-oriented in nature that are agencies predominantly for-profit.

Not-for-profit university

Predominantly academically oriented and regionally accredited schools.



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Obamacare

This term may be considered to be a pejorative term used by those against the Affordable Care Act (ACA) to align it with President Obama. Unwitting use of this term is a political action marginalizing or minimalizing the act, authorized by Congress and upheld by the Supreme Court.

Outcomes

Follow as a result or consequence.

Outcomes assessment

Research directed at assessing the quality and effectiveness as measured by the attainment of a specified end result or outcome. Measures may include health care parameters such as improved health, lowered morbidity, and improvement of abnormal states such as elevated blood pressure or education such as licensure pass rates, application of knowledge, skills, and professional behaviors in clinical practice.

Oversight in higher education

A triad network of federal, state, and non-governmental accrediting bodies that regulate higher education.

Patient Protection and Affordable Care Act (PPCA)

In earlier versions, the Affordable Care Act (ACA) was previously known as the Patient Protection and Affordable Care Act (PPCA).

Peer review

A process of self-regulation by a profession or a process of evaluation involving qualified individuals within the relevant field. Peer review methods are employed to maintain standards, improve performance, and provide credibility. In academia peer review is often used to determine an academic paper's suitability for publication.

Philosophy of Education

The reference to either the academic field of applied philosophy or to one of any educational philosophies that promote a specific type or vision of education.

Practical wisdom

Combines the moral will to do the right thing with the moral skill to figure out what the right thing is. The skill develops as practitioners try, and fail, and learn from their mistakes.

Primary care

Primary care is the provision of *integrated, accessible health care services by clinicians who are accountable for addressing a large majority of personal health care needs, developing a sustained partnership with patients, and practicing in the context of family and community.*

Private funding of education

Funding that is not via the government but rather a private entity such as an individual or an organization.



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Private university

Universities not operated by governments, although many private universities receive public subsidies, especially in the form of tax breaks and public student loans and grants.

Professional association

Usually a nonprofit organization seeking to further a particular profession, the interests of individuals engaged in that profession, and the public interest. Also called professional bodies, professional organizations, or professional societies.

Professional education

A system of formal education that prepares novices for highly skilled occupations such as law, medicine, and engineering, through a combination of theory and practice culminating in an award of certification, licensure, or other formal credentials.

Professoriate

The body of college and university teachers at an institution or in society, or the office, duties, or position of a professor.*

Proprietary universities

For-profit colleges and universities that are operated by their owners or investors, rather than a not-for-profit institution, religious organization, or government. They are not funded by tax monies, and thus their long-term sustainability is dependent on the value they provide relative to the perceived value of a degree from a higher educational institution overall.

Public funding of education

The funding via public means through a national or sub-national government.

Public university

A university predominantly funded by public means through a national or sub-national government, as opposed to private sources.

Regional accreditation agencies

Regional bodies that serve 6 defined geographic areas of the country to accredit schools, colleges, and universities. Each regional accreditor encompasses the vast majority of public and nonprofit private educational institutions in the region it serves. They accredit nearly all elementary schools, junior high schools, middle schools, high schools, and public and private institutions of higher education that are academic in nature.

Research

A “studious inquiry or examination; investigation or experimentation aimed at the discovery and interpretation of facts; revision of accepted theories or laws in the light of new facts; or practical application of such new or revised theories or laws.”



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Research I

Term no longer used by the Carnegie Classification of Institutions of Higher Education to indicate universities that engage in extensive research activity.* (See “Research University.”) Carnegie renamed the category "doctoral/research universities-extensive" to "avoid the inference that the categories signify quality differences."

*Carnegie Foundation for the Advancement of Teaching. Accessed June 21, 2015:

<http://carnegieclassifications.iv.edu>

Responsibility

The quality or state of being accountable, such as moral, legal, or mental accountability.

Shared governance

Refers to 2 complementary and sometimes overlapping concepts: giving various groups of people a share in key decision-making processes, often through elected representation; and allowing certain groups to exercise primary responsibility for specific areas of decision making.

Shareholder

One that holds or owns a share in property.

Single-payer system

The financing of health care from a single insurance pool. Under a single-payer system, universal health care for an entire population is financed from a pool to which many parties have contributed, such as employees, employers, and the state.

Social contract

An intellectual device intended to explain the appropriate relationship between individuals and their governments. Social contract arguments assert that individuals unite into political societies by a process of mutual consent, agreeing to abide by common rules and accept corresponding duties to protect themselves and one another from violence and other kinds of harm.

Social need/social responsibility

An ethical ideology or theory that an entity has an obligation to act in ways that benefit society at large.

Special focus institutions

Institutions that award baccalaureate or higher-level degrees for which a high concentration of degrees (above 75%) is in a single field or set of related fields. Excludes Tribal Colleges.

Specialty or professional accreditation agencies

Any accreditation process that relates to specific discipline areas. The US Department of Education (DOE) and the Council for Higher Education Accreditation (CHEA) monitor and recognize specialized and professional accreditors determined to be reputable.



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Tenure

The act, right, manner, or term of holding something, especially a status granted after a trial period to a teacher that gives protection from summary dismissal.

The Carnegie Foundation for the Advancement of Teaching

An independent policy and research center founded by Andrew Carnegie in 1905 and chartered in 1906 by Congress. Through its current work, it seeks to revitalize more productive research and development in education toward the triple aims of improvement: more active, engaging environments for student participation and personal growth, greater effectiveness overall in advancing student learning, and increased efficiency in the use of educational resources.

Transparency

The quality that makes it possible to see through something or the quality that makes something obvious or easy to understand.

Tribal colleges

Colleges and universities that are members of the American Indian Higher Education Consortium, as identified in IPEDS Institutional Characteristics.

Triple Aim

Triple Aim is a collective initiative to achieve three goals for improving the US health care system: (1) improve the experience of care received, (2) improve the health of targeted or identified populations, and (3) reduce per capita cost of health care. Triple Aim has been adopted by Medicaid and Medicare and is the sole mission of the Institute for Health Improvement (IHI), an independent, not-for profit organization located in Cambridge, MA. Just as “Evidence based practice” has been a concept and process infused into the US health care system, “Triple Aim” is also becoming a concept infused into the US health care system.

Universal coverage

Same as universal health care.

Universal health care

Organized health care systems built around the principle of universal coverage for all members of society, combining mechanisms for health financing and service provision.

Wisdom

Accumulated philosophic or scientific learning, the ability to discern inner qualities and relationships, or good sense.



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Assignments/Activities Summary Checklist

Section 1 – Leading Higher Education Institutions

- ✓ Stop and Think: Status of Institutions (slide 9)
- ✓ Stop and Think: Classification of Institutions (slide 12)
- ✓ Research Activity: Explore the Carnegie Rating of Your Institution (slide 13)
- ✓ Research/Written Activity: Mission and Philosophy of Education for your Program and Institution (slide 15)
- ✓ Research Activity: Oversight Mechanisms for Your Institution (slide 18)
- ✓ Research Activity: Funding (slide 20)
- ✓ Stop and Think: Learned Societies (slide 23)
- ✓ Stop and Think/Journaling: Reflecting on the Readings (slide 27)
- ✓ Stop and Think/Journaling: Professional and Liberal Education (slide 28)
- ✓ Stop and Think: Professional Practice (slide 29)
- ✓ Stop and Think: Professional Judgment (slide 30)
- ✓ Stop and Think: Practical Wisdom (slide 31)
- ✓ Stop and Think/Journaling: Discipline Narratives (slide 32)
- ✓ *Discussion Forum: Points for Reflection (slide 35)*

Section 2 – Oversight in Higher Education

- ✓ Stop and Think: Your Accreditation (slide 9)
- ✓ Stop and Think: Academic Freedom (slide 15)
- ✓ Stop and Think: The Professoriate (slide 16)
- ✓ Stop and Think: Faculty Advancement (slide 17)
- ✓ Stop and Think: Program Outcomes (slide 18)
- ✓ Stop and Think: Institution Outcomes (slide 19)
- ✓ Stop and Think: Communications (slide 22)
- ✓ Research Activity: Student Satisfaction and Competence (slide 24)
- ✓ *Discussion Forum: Points for Reflection (slide 27)*



Education Leadership Institute
Module 2: Higher Education, Health Care Systems, and Society

Section 3 – Trends in Health Care

- ✓ Research Activity: Living History (slide 5)
- ✓ Stop and Think: Your Costs (slide 7)
- ✓ Stop and Think: What are the Impacts? (slide 11)
- ✓ Stop and Think: Your Experience (slide 14)
- ✓ Stop and Think: Physical Therapist Specialization (slide 17)
- ✓ Stop and Think: Right or Privilege? (slide 19)
- ✓ Stop and Think: The Need for Care (slide 20)
- ✓ *Discussion Forum: Provision of Primary Care (slide 26)*
- ✓ *Discussion Forum: Points for Reflection (slide 31)*

Section 4 – Major Trends in Society

- ✓ Stop and Think: Changing Physical Therapy Demographics (slide 12)
- ✓ *Discussion Forum: What's Killing Us? (slide 14)*
- ✓ Written Activity: Preparing for These Trends (slide 20) – Refer to “View Content” for Worksheet

Section 5 – Conclusion and Summary of Assignments

- ✓ Stop and Think: Shared Governance (slide 3)
- ✓ Stop and Think: Autonomy (slide 4)
- ✓ Meeting Activity I: Discuss Academic Freedom (slide 5)
- ✓ Meeting Activity II: Discuss ACA and Health Care Reform (slide 6)



Education Leadership Institute
Module 2: Higher Education, Health Care Systems, and Society

References

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- Barker T. Academic freedom at heart of UMSL flap: teacher says he was forced out after videos misrepresented class; school says he left willingly. *St Louis Post Dispatch*. May 7, 2011:a-1,a-5.
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- Dunn DS, McCarthy MA, Baker SC, Holonen JS. *Using Quality Benchmarks for Assessing and Developing Undergraduate Programs*. San Francisco, CA: Jossey Bass; 2011.
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- Gasman M. Five lessons for campus leaders: academic freedom, shared governance and tenure at an historically black institution, *Change*. 2010; Nov/Dec; 54-57.
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Should you desire to explore more about trends and issues of the future beyond demographics, all of which will influence physical therapist education, consider reading *Drivers of Change* (2009) published by Prestel in Munich. Cost is €40 (EU) and may be accessed at www.driversofchange.com.



Module 3:
Institutional Leadership and Management
Module Resources



Education Leadership Institute
Module 3: Institutional Leadership and Management

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Education Leadership Institute
Module 3: Institutional Leadership and Management

Learning Outcomes

After completing this module, you should be able to:

1. Describe and apply contemporary leadership theories, principles, and values that are relevant to higher education and physical therapy education.
2. Identify, explain, and implement management strategies that are grounded in leadership principles, institutional strategic planning documents, and knowledge of the environment of higher education.
3. Demonstrate leadership behaviors that are authentic, grounded in institutional and professional values, and achieve the intended results.
4. Justify/explain decisions and actions to others based on an understanding of the academic administrator's responsibilities, a sense of duty to represent faculty and students, and alignment congruent with institutional values, priorities and directives.
5. Apply proven negotiation/conflict resolution methods and time management techniques to daily administrative challenges.



Education Leadership Institute
Module 3: Institutional Leadership and Management

Faculty Biography



Dr. Nancy Hall is a David Ross Boyd Professor Emeritus from the University Of Oklahoma College Of Medicine. During her 31 year tenure at the University of Oklahoma, she had RO1 NIH funding for the first 12 years in the Department of Pathology and then was appointed to the Dean's Office staff as Assistant Dean of Admissions. Over the years, she had oversight of the admissions process (27 years), student affairs (14 years), was co-director of the Health Center Faculty Leadership program (18 years), and served most recently as associate dean for academic affairs (11 years) for the college. Throughout her administrative responsibilities, she taught the respiratory system in the pathology course and

started and directed the college course on professional ethics. Her parting gift to the college was a new curriculum for the four years of medical education. At the national level, she served on over 22 teams conducting site surveys of medical schools for accreditation by the U.S. Department of Education. During her career she served as a bridge to community activities. A graduating resident award in Pathology for community outreach is in her name as is a scholarship for a graduating senior medical student. In addition to teaching, research, and service, Hall participated in city, state, and national leadership training and from 2009 to the present has served as the state Leadership Oklahoma program director designing and implementing ten modules of leadership training for leaders across the state.

Hall's current activities include teaching active duty military in the University of Oklahoma doctoral programs (International Relations) on military bases throughout the world, consulting with new medical schools designing their curriculum, consulting with community organizations to improve organizational structure, and serving as a trustee for the American Red Cross, the Arts Council of OKC, Lynn Health Research Institute, and Leadership Oklahoma.



Education Leadership Institute
Module 3: Institutional Leadership and Management

Virtual Office Hours-Module 3

- **Wednesday, September 16, 2015; 12:00 noon – 2:00 pm CT** (1:00 – 3:00 pm ET; 11:00 am – 1:00 pm MT; 10:00 am – 12:00 pm PT)
- **Friday, September 18, 2015; 9:00 am – 11:00 am CT (Virtual Live Webinar)** (10:00 am – 12:00 pm ET; 8:00 – 10:00 am MST; 7:00 – 9:00 am PT)
- **Monday, September 21, 2015; 1:00 – 3:00 pm CST** (2:00 – 4:00 pm ET; 12:00 – 2:00 pm MT; 11:00 am – 1:00 pm PT)

Required Readings

- Kouzes JM, Posner BZ. *The Leadership Challenge: How to Make Extraordinary Things Happen in Organizations*. 5th Edition. San Francisco, CA: Jossey-Bass; 2012. (Section 1)
- Covey SMR. *The Speed of Trust: The One Thing That Changes Everything*. New York: Simon and Schuster Free Press; 2008. (Section 3)
- Diamond S. *Getting More: How You Can Negotiate to Succeed in Work and Life*. New York: Three Rivers Press; 2012. (Section 5)

Definitions

Leadership: “Leadership is ultimately about creating a way for people to contribute to making something extraordinary happen.” Alan Keith, Genentech (Section 1)

Meeting: A group gets together with a common interest and with relevant knowledge and expertise to accomplish a purpose or goal through a process of group interaction.

The goal of a meeting could be to plan, make a decision, implement a plan, solve problems, evaluate data, build collegiality, provide involvement, etc. (Section 5)



Education Leadership Institute
Module 3: Institutional Leadership and Management

Assignments/Activities Summary Checklist

Section 1 – Contemporary Leadership Theories

- ✓ Stop and Think: Personal Reflection on Leadership (slide 6)
- ✓ Assignment: Personal Reflection on Leadership (slide 7)
- ✓ Stop and Think (slide 12)
- ✓ Stop and Think: Modeling the Way (slide 14)
- ✓ Stop and Think: Inspiring a Shared Vision (slide 16)
- ✓ Stop and Think: Challenging the Process (slide 19)
- ✓ Stop and Think: Enabling Others to Act (slide 21)
- ✓ Stop and Think: Encouraging the Heart (slide 23)
- ✓ Assignment: The Five Practices Model (slide 24)

Section 2 – Management Strategies

- ✓ Stop and Think: Leadership and Management – Global Consideration (slide 8)
- ✓ Stop and Think: Leadership versus Management – Personal Considerations (slide 9)
- ✓ Stop and Think: Your Role (slide 10)
- ✓ Stop and Think: Evaluate Your Environment (slide 12)
- ✓ Assignment: Challenge in Your Academic Environment (slide 13)

Section 3 – Leadership Behaviors

- ✓ Stop and Think: Trust as a Leadership Behavior (slide 5)
- ✓ Writing Assignment: Personal Qualities You Admire (slide 8)
- ✓ Stop and Think: Personal Characteristics (slide 10)
- ✓ Stop and Think: Self Trust (slide 14)
- ✓ Stop and Think: Relationship Trust (slide 16)
- ✓ Stop and Think: Organizational Trust (slide 18-19)



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Module 3: Institutional Leadership and Management

- ✓ Stop and Think: Market Trust (slide 21)
- ✓ Stop and Think: Societal Trust (slide 23)
- ✓ Assignment: Trust (slide 25)
- ✓ *Discussion Forum: Contemporary Leadership (slide 26)*

Section 4 – Responsibilities, Advocacy, and Change

- ✓ Stop and Think: Faculty Advocacy (slide 7)
- ✓ Stop and Think: Strategic Planning (slide 11)
- ✓ Stop and Think: Change in Leadership (slide 13)
- ✓ Stop and Think: Economic Changes (slide 14)
- ✓ Assignment (slide 16)
- ✓ *Discussion Forum: Leadership Style (slide 17)*

Section 5 – Application of Leadership and Management to Change

- ✓ Assignment: Negotiation (slide 16)
- ✓ *Discussion Forum: Negotiation Sharing (slide 17)*
- ✓ Stop and Think: Time Management (slide 20)
- ✓ Stop and Think: Meetings (slide 27)
- ✓ Assignment : Application of Management and Leadership (slide 28)



Education Leadership Institute
Module 3: Institutional Leadership and Management

References

- Kouzes JM and Posner BZ. *The Leadership Challenge: How to Make Extraordinary Things Happen in Organizations*. 5th Edition. San Francisco, CA: Jossey-Bass; 2012.
- Covey SMR. *The Speed of Trust: The One Thing That Changes Everything*. New York: Simon and Schuster Free Press; 2008.
- Diamond S. *Getting More: How You Can Negotiate to Succeed in Work and Life*. New York. Three Rivers Press: 2012.



Module 4:
Student Affairs
Module Resources



2015-2016 Education Leadership Institute
Module 4: Student Affairs

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2015-2016 Education Leadership Institute
Module 4: Student Affairs

Outcome Objectives

After completing this module, you should be able to:

1. Examine typical Student Affairs activities, relationships formed within the academic environment, and the overall contribution of Student Affairs to a holistic educational experience.
2. Evaluate the concepts and components of a strategic enrollment management (SEM) process that is defensible and congruent with the institution and program missions.
3. Explain the purpose of different Student Affairs functions in relation to SEM, as well as institutional leader and faculty interactions with these functions.
4. Identify and use the resources and procedures needed to help manage a wide variety of student needs and issues including, but not limited to, student academic progress, reasonable accommodations, students in crisis, and inappropriate or unprofessional behaviors.
5. Discuss federal regulations and considerations in establishing standards, policies, and procedures related to student admissions, enrollment, conduct, and progress.



2015-2016 Education Leadership Institute
Module 4: Student Affairs

Faculty Biography



Polly Moss
Director, Innovation Alliance

After 30 years in Student Affairs, 26 of those in professional education, Polly retired from working full-time. Her retirement currently includes still working part-time for area higher education institutions in areas of promoting student success, workforce development, curriculum, enrollment and innovation. In addition, she teaches fitness classes, volunteers for the American Red Cross, her church and local school and takes violin lessons. Polly also maintains her faculty status with the Northeast Ohio Medical University.

In 2011, Polly ventured into a new arena in higher education - combining her years of experience in student and academic affairs administration and teaching with higher education's evolving role as a major catalyst in growing the innovation ecosystem. This was as Director of the Innovation Alliance with The University of Akron, Lorain County Community College and Stark State College. These three institutions in northeastern Ohio allied to create the Innovation Alliance, a corridor of educational efficiency, knowledge creation and economic development. By combining selected resources of its partners, the alliance stimulated economic development and catalyzed innovation across all sectors of the corridor – education, government, health care, manufacturing and high-growth industries. Polly assisted in implementing these institution presidents' vision by joining the vast resources and strengths of the region to increase innovation, technology transfer, and support for entrepreneurs and new business development through strategic approaches. The alliance also responded to the needs of employers for workers of the future by creating degree programs and partnerships to meet the demand for a highly skilled workforce. In 2012, the Innovation Alliance was awarded the Team NEO Award for Regionalism and Cross Border Collaboration.

While working directly in student affairs, Polly's experiences included responsibility and oversight for all areas of student affairs: enrollment management; admissions; financial aid; registrar; student activities and organizations; student government and leadership; student academic progress; student conduct and discipline; career, personal and academic advising; project management; research; teaching; and supervising the implementation of an ERP system. While assistant dean for student affairs and admissions with the Northeast Ohio Medical University in Rootstown, Ohio, she was instrumental in the start-up of the institution's College of Pharmacy and subsequently recognized with the President and Dean's Award for her



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involvement in that success. All areas of her work included efforts and initiatives to strategically partner with academic affairs for the total education and development of students. She implemented the multiple mini interview admissions process for the College of Medicine and presented nationally on this innovative admissions practice. While at NEOUCOM, Polly received: the Olson-Blair Award for Administrative Excellence for demonstrating outstanding administrative accomplishments including the ability to supervise, make critical judgments and contributing to the betterment of the College; the Dean's Award for having played a significant role in the growth and development of the College of Medicine's academic program and providing outstanding guidance and leadership; the Gender Equity Award; the Alpha Omega Alpha Recognition Award; and numerous Service to Class awards from graduating classes.

Polly has presented internationally and nationally on topics related to admissions, financial aid, student advising, career development, student academic review and promotions, disabilities, project management, the assessment of student professionalism attributes, the image of women in popular culture, and pan flu preparedness. She has contributed her time and energies to numerous national professional organizations through presentations and committee involvement, including the Association of American Medical Colleges, Association of Student Judicial Affairs, National Association of Student Financial Aid Administrators, Education Law Association, and the International Conference on Education. Her research topics have included factors predicting success of students in the BS/MD program, a correlation of pharmacy and medical student matriculating student questionnaire data with academic performance in school, student awareness and satisfaction with career development activities, the undergraduate experience of students in a combined BS/MD degree program, the relationship between students' academic performance and their ability to manage their finances, the influence of financial aid on student academic performance and persistence in professional school, and a longitudinal study of student awareness, knowledge and satisfaction with financial aid.

Polly completed courses toward a doctorate at Kent State University in educational administration with a focus in education law. She received her master degree in educational administration from Kent State University and her bachelor of science in organizational communications from Ohio University with minors in psychology and management. She is certified by the Aerobics Fitness Association of America as a group fitness instructor and as an instructor with the Silver Sneakers FLEX program. She teaches low impact aerobics classes with a focus on cardio health, flexibility, strength and balance, in her community. She has a special interest in the images of women in media, media education for young girls. She enjoys scuba diving, running, strength training, skiing, and reading.

Polly's educational philosophy, which served as her guide in student affairs, is below:

Literature has yielded solid, empirical evidence to support efforts within higher education to emphasize a holistic approach to educating students. This includes: offering a beneficial environment that supports the student learning process; and recognizing the value of the information curriculum and student services as learning experiences. It is therefore critical to establish partnerships with units within the institution to form more united efforts in advancing student learning to provide a more powerful overall educational experience for students. Education must provide for the overall development of an integrated sense of identity, thus encompassing all aspects of the educational experience.



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Module 4: Student Affairs

Faculty Virtual Office Hours-Module 4

- Wednesday, **October 21, 2015**, 11:00 am – 1:00 pm ET (10 am – 12 pm CT; 9 – 11 am MT; 8 – 10 am PT)
- Friday, **November 6, 2015**, 2:00 – 4:00 pm ET (**Adobe Webx Webinar session**) (1-3 pm CT; 12-2 pm MT; 11 am – 1 pm PT)
- Monday, **November 16, 2015**, 12:00 – 2:00 pm ET (11:00 am – 1:00 pm CT; 10 am – 12 pm MT; 9 – 11 am PT)

Readings

Required Readings

Section 1

- American Association for Higher Education, American College Personnel Association, NASPA: Student Affairs Administrators in Higher Education. *Powerful Partnerships: A Shared Responsibility for Learning*; Washington, DC; 1998.
http://www.acpa.nche.edu/sites/default/files/taskforce_powerful_partnerships_a_shared_responsibility_for_learning.pdf
- American College Personnel Association. Student learning imperative: Implications for student affairs. American College Personnel Association. Washington, DC; 1996.
http://www.housing.berkeley.edu/student/ACPA_student_learning_imperative.pdf

Section 2

- Bontrager B. Strategic enrollment management: Core strategies and best practices. *College & University Journal*. 2004; 79(4):9-13.
http://registrar.iupui.edu/emc/ppt/bontrager_core_strategies.pdf
- Denison R, Clinton B. Utilizing SEM principles to evaluate program effectiveness and viability and bridge the gap between enrollment management and academics. *AACRAO SEM Newsletter*. August 2012.
<http://www4.aacrao.org/semsource/sem/index7b79.html?fa=view&id=5575>
- Hossler, D, Kalsbeek, D. Enrollment Management and Managing Enrollments: Revising the Context for Institutional Strategy. *Strategic Enrollment Management Quarterly*. 2013.
http://offices.depaul.edu/emm/emm-library/Documents/SEMQuarterlyArticle_HosslerandKalsbeek_2013.pdf



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<http://consulting.aacrao.org/wp-content/uploads/2010/03/AC-Solutions-Community-College-Roadmap.pdf>
- Soares L. The Rise of Big Data in Higher Education. *EDUCAUSE* webcast. March 22, 2012. <http://www.educause.edu/library/resources/rise-big-data-higher-education>

Section 3

- Association of American Medical Colleges. Roadmap to Diversity and Educational Excellence: Key Legal and Educational Policy Foundations for Medical Schools (2nd Edition). Washington, DC; 2014.
https://members.aamc.org/eweb/upload/14-050%20Roadmap%20to%20Diversity_2nd%20ed_FINAL.pdf
- Caldwell C, Shapiro J, Gross S. Ethical leadership in higher education admission: Equality vs. equity. *NAACAC*. 2007.
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- National Association of Student Financial Aid Administrators. [The 2010 NASFAA administrative burden survey](#). February 2011:1-77.
<http://www.nasfaa.org/uploads/documents/ektron/2fb1d27e-c6e5-49a7-bbd4-b775828095fc/b82b35658509413c88d0dc3b24ab8eb77.pdf>
- Utzman R, Riddle D, Jewell D. Use of demographic and quantitative admissions data to predict academic difficulty among professional physical therapist students. *Phys Ther*. 2007; 87(9):1164-1180.
<http://ptjournal.apta.org/content/87/9/1164.full.pdf+html?sid=d29f6583-a2b9-4d62-a33d-4c9beff69eb4>

Section 4

- Fein B. A review of the legal issues surrounding academic dismissal. *J Phys Ther Educ*. 2001;15(1):20-25.
<http://search.proquest.com/health/docview/217067578/fulltextPDF/5D6C565C30054884PQ/1?accountid=41004>
- Francis N, Salzman A, Polomsky D, Huffman E. Accommodations for a student with a physical disability in a professional physical therapist education program. *J Phys Ther Educ*. 2007;21(2):60-65.
<http://search.proquest.com/health/docview/217071489/fulltextPDF/FA8899305CB243D3PQ/1?accountid=41004>



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Module 4: Student Affairs

- Ingram D. Opinions of physical therapy education program directors on essential functions. *Phys Ther.* 1997;77(1):37-45.
<http://ptjournal.apta.org/content/77/1/37.full.pdf>
- Pavela G. Applying the power of association on campus: A model code of academic integrity. *Journal of College and University Law.* 1997;24(1):97-118.
http://www.academicintegrity.org/icaai/assets/model_code.pdf
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<http://search.proquest.com/nursing/docview/217074686/94A9BA92C09A4C95PQ/6?accountid=41004>

Recommended Readings

- Association of American Medical Colleges. Medical students with disabilities: A generation of practice. Washington, DC: 2015.
<https://members.aamc.org/eweb/upload/Medical%20Students%20with%20Disabilities%20A%20Generation%202005.pdf>
- Collaboration: Student Affairs and Academic Affairs Working Together To Promote Student Learning. ERIC Digest.
<http://files.eric.ed.gov/fulltext/ED432940.pdf>
- Mohr T, Ingram D, Fell N, Mabey R. The case for academic integrity in physical therapist education. *J Phys Ther Educ.* 2011;25(2):51-6.
http://findarticles.com/p/articles/mi_qa3969/is_201104/ai_n57428594/pg_7/
- Visit the AHEAD web site to learn more about the resources available to higher education regarding disabilities.
<http://www.ahead.org/>



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Module 4: Student Affairs

Definitions

Academic Transcript: Certified document that represents an unabridged summary of a student's academic history at an educational institution and is intended for use by parties external to the institution. It is distinguished from the larger body of information that may be contained in the student's educational or academic record at the institution.

Accommodation: Assisting students with disabilities to meet essential standards by providing them with an equal opportunity to participate in all aspects of each course or experience. (Reasonable accommodation is not intended to guarantee that students will be successful in meeting the requirements of any one course or of clinical education.)

Essential Functions: Acceptable demonstration of mastery and/or competence in various disciplines throughout the program. Acceptable levels of mastery are judged by faculty members, examinations, and other measurements of performance. These essential functions are the aptitudes and abilities that allow students to complete the curriculum and to perform the skills consistent with those needed in practice in the profession.

Strategic Enrollment Management (SEM): "SEM is a comprehensive process designed to help an institution achieve and maintain optimum enrollment, where optimum is defined within the academic context of the institution."¹ "Enrollment management enables fulfillment of institutional mission and students' educational goals."² "Enrollment management refers to the ability of institutions of higher education to exert more systematic influence over the number and characteristics of new students, as well as influence the persistence of students to continue their enrollment from the time of their matriculation to their graduation."³

¹Dolence MG. *Strategic Enrollment Management: A Primer for Campus Administrators*. Washington, DC: American Association of Collegiate Registrars and Admissions Officers. 1993.

²Bontrager B. Strategic enrollment management: core strategies and best practices. *College & University*. 2004;79(4):9-16.

³Answers.com: <http://www.answers.com/topic/enrollment-management-in-higher-education>.

Student Academic Records: Information relating to a student's admission to and academic performance at the institution. Student academic records include information contained in an original transcript, in electronically stored records, and in the "official student academic record" as maintained by the registrar.

Student Code of Conduct: Document(s) in which the rules governing behavioral expectations of students is/are listed, including information regarding violations, complaints, etc.

Student Conduct Board: Administrative process of justice operating in an educational setting. Though Boards follow procedural guidelines (as required by law), they do not follow the same process used by the criminal or civil courts.



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Student Educational Records: These are records that are: a) directly related to a student; and b) maintained by an educational agency, institution, or by a party acting for the agency or institution. An education record may include personal information, enrollment records, grades, and schedules. The educational record may not necessarily become part of the permanent academic record and can even include records on students maintained by different offices or faculty/staff (excludes security and counseling records).

Student Records: All records maintained by the college or university relating to individual students, which could include academic records and/or educational records.

Student Record Information and Permanent Records: This is the permanent student record or academic record and is maintained by the registrar.



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Module 4: Student Affairs

Assignments/Activities Summary Checklist

Checklist

Introduction

- ✓ Ask yourself if there are other areas, topics, or issues regarding Student Affairs and student development that you'd like to add to the curriculum. (slide 15)
- ✓ If there are topics or issues you would like to add to Module 4, please provide your feedback on Module 4 online assessment and let the Program Director know to begin a list that can be added to subsequent releases of the module. (slide 15)

Section 1 – Student Affairs Roles, Strategic Partnerships, and Contributions to Learning

- ✓ Stop and Think: Student Affairs Function (slide 9)
- ✓ Research and Journaling Activity: Student Affairs at Your Institution (slide 16)
- ✓ Research and Journaling Activity: The Student Affairs Mission (slide 18)
- ✓ Stop and Think Activity: Your Collaboration With Student Affairs (slide 22)

Section 2 – Strategic Enrollment Management

- ✓ SEM Pre-test (slides 7-8)
- ✓ Research and Journaling Activity: SEM at Your Institution (slide 14)
- ✓ Stop and Think Activity: How Can Your Institution Most Effectively Utilize Data? (slide 17)
- ✓ Stop and Think Activity: Integrating SEM with Your Program (slide 20)
- ✓ Stop and Think Activity: Faculty Involvement with SEM (slide 28)
- ✓ SEM Post-test (slides 32-33)

Section 3 – Mission-Critical Student Affairs Functions

- ✓ *Stop and Think/Discussion Forum: Which Candidate to Admit? (slides 5-6)*
- ✓ Research and Journaling Activity: Admissions (slide 13)
- ✓ *Discussion Forum and Journaling Activity: Interaction with Registrar (slide 18)*
- ✓ Stop and Think Activity: Dealing with the Educational Record (slide 27)



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- ✓ *Research and Journaling Activity: Financial Aid (slide 31)*
- ✓ *Research and Journaling Activity: Advising at Your Institution (slide 36)*

Section 4 – Student Academic and Professional Progress

- ✓ *Stop and Think Activity: Disabilities and Essential Functions (slide 13)*
- ✓ *Research and Journaling Activity: Essential Standards at Your Institution (slide 16)*
- ✓ *Discussion Forum and Journaling Activity: Student Case Scenario (slide 23)*
- ✓ *Discussion Forum and Journaling Activity: Concerns About a Student (slide 32)*
- ✓ *Stop and Think Activity: The Troubled Student (slide 38)*

Section 5 – Policies, Compliance, and Legal Issues

- ✓ *Stop and Think Activity: Student Criminal Behavior (slide 12)*
- ✓ *Discussion Forum and Journaling Activity: Hot Topics: Sexual Harassment, Assault, Violence, Drug and Alcohol Abuse (slides 20-21)*
- ✓ *Research and Journaling Activity: Sexual Harassment – Hot Topic! (slide 24)*
- ✓ *Stop and Think Activity: Drug and Alcohol Abuse Prevention (slide 29)*
- ✓ *Stop and Think Activity: Student Conduct and the Profession (slide 37)*

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Bakst D. *Major legal challenges for registrars and admissions officers*. Michigan Association of Collegiate Registrars and Admissions Officers. November 2010.
<http://www.macrao.org/Meetings/AnnualConference/AnnualConference2010/CLHMajor%20Legal%20Challenges.pdf>.

Bontrager B. Strategic enrollment management: Building institutional vitality. *College & University Journal*. 2004; 79(4):9-13.
<http://registrar.iupui.edu/emc/ppt/vitality.pdf>

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<http://www.educationlawconsortium.org/forum/2007/papers/Flanders2007.pdf>

Smith C. Finding the academic context: The SEM role for faculty. AACRAO Consulting; 2009.

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<http://www.educationalpolicy.org/events/R07/documents/StrategicEnrollmentTHURS%20%5bCompatibility%20Mode%5d.pdf>



Module 5 – Legal and Policy Issues ***Module Resources***



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Module 5 – Legal and Policy Issues

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Module 5 – Legal and Policy Issues

Outcome Objectives

After completing this module, you will be able to:

1. Describe the general precepts for the documentation of controversial matters (Section 1).
2. Recall the principles and concepts underlying risk management practices as well as the risk management processes and procedures for your institution (Section 2).
3. Identify and describe the necessary components of an affiliation agreement, using a provided sample agreement (Section 3).
4. Summarize and apply your institution's grievance policies and procedures (Section 4).
5. Describe and analyze the limits that can, and in some instances must, be placed on religious activity by students and faculty related to their academic activity (Section 5).
- 6a. Evaluate the expanse and limits of the principles of academic freedom as they apply to faculties' performance of their duties and students' academic performance (Section 6).
- 6b. Describe and assess the institution's authority to make determinations about the manner in which it operates and the content and conduct of its academic programs (Section 6).
- 6c. Explain to students and faculty the scope of their respective academic freedom, including its limitations (Section 6).
- 7a. Assess the extent of the rights of and limits on students' freedom of speech (Section 7).
- 7b. Examine the rights and limits on faculties' (employees') freedom of speech in their roles as employees and in their personal lives (Section 7).
- 7c. Determine what constitutes hate speech and recall the sanctions available when such speech is used by students or faculty (Section 7).
- 7d. Know the need for immediate and comprehensive action when faced with a situation involving hate speech (Section 7).



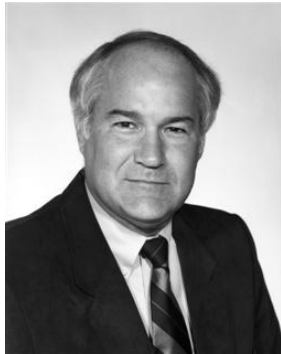
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8. Recognize the situations in which you need to consult with your immediate administrative supervisor to request a consultation with the institution's legal counsel (Section 8).
- 9a. Analyze the nature, extent, and limits of your institution's indemnification of its employees and students engaged in clinical training (Section 9).
- 9b. Explain the limited circumstances under which you may have exposure to personal liability (Section 9).



Education Leadership Institute
Module 5 – Legal and Policy Issues

Faculty Biography



Steve Milam, JD

For over 30 years, Steve Milam served as an assistant attorney general for several Washington state public institutions of higher education, the last 23 years of which were at the University of Washington. He was a senior counsel and assistant attorney general for the University of Washington Health Sciences and Medical Centers. His clients included the University of Washington Schools of Dentistry, Medicine (including the Division of Physical Therapy), Nursing, Pharmacy, Public Health and Community Medicine, and Social Work, as well as Harborview Medical Center and University of Washington Medical Center and Airlift Northwest.

Currently, Milam is an affiliate assistant professor in the Department of Bioethics and Humanities for the University of Washington School of Medicine and is in private practice as an attorney and consultant on issues related to higher education and health law. Milam is an adjunct professor teaching Higher Education Law, for the Student Development Administration Program at Seattle University College of Education. He is also a part-time lecturer teaching the End-of-Life seminar for the University of Washington School of Law.

Currently, Milam is an affiliate assistant professor in the Department of Bioethics and Humanities for the University of Washington School of Medicine and is in private practice as an attorney and consultant on issues related to higher education and health law. Milam has been an adjunct professor teaching Higher Education Law, for the Student Development Administration Program at Seattle University College of Education. He is also a part-time lecturer teaching the End-of-Life seminar for the University of Washington School of Law.

Milam is a graduate of Washington State University and obtained his legal education at the University of Oregon. He is a past president of the Washington State Society of Healthcare Attorneys and a past member of the Board of Directors of the National Association of College and University Attorneys.



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Milam has made presentations throughout the United States on a variety of medical, legal, and education topics during his career, including to audiences of physical therapy educators. His articles on legal issues related to the evaluation of student clinical performance and academic dismissal have been published in the *New England Journal of Medicine*, *Academic Medicine*, *Journal of College and University Law*, *Journal of Law and Ethics in Dentistry*, and *Perspective on Physician Assistant Education* (former title of the *Journal of Physician Assistant Education*).

Faculty Virtual Office Hours – Module 5

- December 3, 2015; 11:00 am to 1:00 pm Pacific Time (Adobe Webinar)
- December 17, 2015; 11:00 am to 1:00 pm Pacific Time (Adobe Webinar)
- January 14, 2016; 11:00 am to 1:00 pm Pacific Time (Adobe Webinar)

Readings

Required Readings

Section 1

- Burl D. “From Tinker to Twitter: Managing student speech on social media.” *NACUA Notes*. 2011; 9 (7). (View Resources, PDF Document Social Media)
- Sample Statement of Essential Functions, Skills, and Abilities requirements. (View Resources - Word document for Sections 1 and 4)
- *The documents below were made available expressly for this ELI Module with the permission of the American Association of Medical Colleges (AAMC). These documents were published on October 15, 2013.*
 - Sample Affiliation Agreement (View Resources, Word document Sections 1 and 3)

Section 2

- Adams JF, Hall JW. Legal Liabilities in Higher Education: Their Scope and Management (View Resources, PDF document)

Section 3

- Milam S. *Student Criminal Background Checks*. NACUANOTES. 2006; 4(1):1-12. (View Resources, PDF document)
- *The documents below were made available expressly for this ELI Module with the permission of the American Association of Medical Colleges (AAMC). These documents were published on October 15, 2013.*
 - Sample Affiliation Agreement (View Resources, Word document Sections 1 and 3)



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- AAMC Uniform Clinical Training Affiliation Agreement (October 15, 2013) (View Resources, PDF document)
- AAMC Implementation Letter (View Resources, PDF document)
- AAMC Frequently Asked Questions (View Resources, PDF document)
- AAMC Crosswalk to LCME Accreditation Standards (Oct 15, 2013) (View Resources, PDF Document)

Section 4

- Sample statement on Essential Functions, Skills, and Abilities, the Physical Therapy Program's Requirements for Admission, Retention, and Graduation (View Resources - Word document Sections 1 and 4)
- Family Educational Rights and Privacy Act (FERPA), 20 USC §1232g (b)(1) and (b)(2)(A). <http://www.law.cornell.edu/uscode/20/1232g.html>.
- Papadakis MA, Hodgson CS, Teherani A, and Kohatsu ND. Unprofessional behavior in medical school is associated with subsequent disciplinary action by a state medical [word missing?]. *Academic Medicine*. 2004; 79(3):244-249. <http://www.ncbi.nlm.nih.gov/pubmed/14985199>.
- *University of Missouri v Horowitz*, 435 U.S. 78, n.6, 98 S. Ct. 948, 955-6 n.6 (1978). <http://openjurist.org/435/us/78/board-of-curators-of-university-of-missouri-v-horowitz>.
- *Richmond v Fowlkes*, 228 F.3d 854, 858 (8th Cir. 2000). <http://openjurist.org/228/f3d/854/john-richmond-v-karrol-fowlkes>.
- *University of Michigan v. Ewing*, 474 U.S. 214, 106 S. Ct. 506 (1985). <http://openjurist.org/474/us/214/regents-of-university-of-michigan-v-e-ewing>
The Ewing case is also assigned for reading in Section 6 in the third bullet.
- Keefe v. Adam, et al (Central Lakes College – Minn.), U.S. district. CT. D. Minn. August 26, 2014. http://scholar.google.com/scholar_case?q=keefe+v+adams&hl=en&as_sdt=3,24&case=974206745385272016&scilh=0

Section 5

- First and Fourteenth Amendments to the United States Constitution. <http://constitutionus.com/>
- State Constitutions. <http://constitutionus.com/>
- *Knight v Connecticut Department of Public Health*, 275 F. 3rd 156 (2001). <http://openjurist.org/275/f3d/156/jo-ann-knight-v-state-of-connecticut-department-of-public-health>.
- Oakley ET, Katz G, Sauer K, Dent B, and Millar AL. Physical therapists' perception of spirituality and patient care: Beliefs, practices, and perceived barriers. *J Phys Ther Educ*. 2010; 24(2):45-52. (View Resources, PDF document)
- *Calvary Bible Presb. Church of Seattle v Board of Regents of the University of Washington*, 72 Wn. 2nd 912, 436 P. 2nd 189 (1967). http://scholar.google.com/scholar_case?case=14540079098327680411&q=Calvary+Bible+Presb.+Church+of+Seattle+v.+Board+of+Regents+of+the+University+of+Washington&hl=en&as_sdt=4,48.



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Section 6

- American Association of University Professors. 1940 statement on principles on academic freedom and tenure. *AAUP Policy Documents and Reports, 10th Ed.* 2006.
<http://www.aaup.org/AAUP/pubsres/policydocs/contents/1940statement.htm>
- Joint Statement on Rights and Freedoms of Students. American Association of University Professors, Association of American Colleges and Universities, U.S. Student Association, National Association of Student Personnel Administrators, National Association of Women in Education. 1967.
<http://www.aaup.org/AAUP/pubsres/policydocs/contents/stud-rights.htm>.
- Regents of the University of Michigan v Ewing 474 US 214 (1985). In this case the court upheld an academic dismissal. Concentrate on the discussion about academic freedom.
<http://openjurist.org/474/us/214/regents-of-university-of-michigan-v-e-ewing>.
 Ewing case was also assigned for reading in Section 4 in the last bullet.
- Shaffer FP. *A Guide to Academic Freedom*, Association of Governing Boards.
<http://agb.org/trusteeship/2011/7/guide-academic-freedom>
- Fisher v. University of Texas at Austin, 758 F. 3d 633 - Court of Appeals, 5th Circuit 2014
https://scholar.google.com/scholar_case?q=Fisher+v+university+of+texas&hl=en&as_sdt=3,48&case=18110303966810115747&scilh=0
 This most recent Fisher case has been accepted for review by the U.S. Supreme Court for the 2015-2016 Term and will be argued during that term and will likely be decided toward the end of that term.
- Urofsky v Gilmore, 216 F3d 401, at 410 (4th Cir. 2000).
http://scholar.google.com/scholar_case?case=2904778273227067629&q=urofsky+v+gilmor&hl=en&as_sdt=2,48&as_vis=1
- Bishop v Aronov 926 F 2d 1066, at 1075, 1076-77 (11th Cir. 1991).
http://scholar.google.com/scholar_case?case=10981438984400959023&q=Bishop+v+Aronov&hl=en&as_sdt=2,48
- Edwards v California. University of Pennsylvania 156 F. 3d 488 at 491 (3d Cir. 1998).
http://scholar.google.com/scholar_case?case=1050924948443343155&q=Edwards+v+California.+University+of+Pennsylvania&hl=en&as_sdt=2,48
- Ward v Wilbanks, Case No. 09-CV-11237 July 26, 2010 at p. 33. (U.S. Dist. Ct. E.D. S. Div. Mich.).
http://scholar.google.com/scholar_case?case=9296901630954358335&q=related:P8bluMY6BYEJ:scholar.google.com/&hl=en&as_sdt=2,48&as_vis=1
- Ward v. Polite (formerly Ward v. Wilbanks) et al, 667 F. 3rd 727 – Court of Appeals, 6th Circuit 2013
http://scholar.google.com/scholar_case?q=wilbanks+v+polite&hl=en&as_sdt=6,48&case=2227986688944699949&scilh=0
 This is the Circuit Court of Appeals decision on the appeal of Ward v. Wilbanks. (Assigned in the preceding bullet and the name of the defending party was changed from Wilbanks to Polite for reasons wholly unrelated to the issues involved in the case.) The Circuit Court of Appeals reversed the lower court's decision in Ward v. Wilbanks.
- The Ward v. Polite (formerly Ward v. Wilbanks) was settled by the parties - see the news article about the settlement under Learning Center Resources."



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- Keeton v Anderson-Wiley 733 F. Supp 1368, S.D. Ga. At p. 7. (2010).
http://scholar.google.com/scholar_case?case=14658772751874519804&q=Keeton+v+Anderson-Wiley+&hl=en&as_sdt=2,48&as_vis=1
- Keeton v. Anderson–Wiley 664 F 3rd 865 (Dec. 16, 2011) (U.S. Ct. of Appeals 11th Circuit).
http://scholar.google.com/scholar_case?case=13301986901666971989&q=keeton+v+anderson&hl=en&as_sdt=2,48
- Keeton v. Anderson-Wiley ___ F. Supp ___, S.D. Ga. (June 22, 2012)
http://s3.amazonaws.com/cdn.getsnworks.com/spl/pdf/keeton_district.pdf
- Senate Engrossed House Bill HB2565, “Rights of Students at Universities and Colleges.” Title 15, Chapter 14, Article 6 of the Arizona Revised Statutes.
<http://www.azleg.gov/legtext/50leg/1r/bills/hb2565s.pdf>
- Calvary Bible Presb. Church of Seattle v Board of Regents of the University of Washington, 72 Wn. 2nd 912, 436 P. 2nd 189 (1967).
http://scholar.google.com/scholar_case?case=14540079098327680411&q=Calvary+Bible+Presb.+Church+of+Seattle+v+Board+of+Regents+of+the+University+of+Washington&hl=en&as_sdt=4,48
- Hubbard v John Tyler Community College, 455 F. Supp. 753 at 755 (E.D. Va. 1978).
http://scholar.google.com/scholar_case?case=5257212083270902707&q=Hubbard+v+John+Tyler+Community+College&hl=en&as_sdt=2,48&as_vis=1
- McDonald v Hogness, 92 Wn.2d 431, 598 P.2d 707 (1979).
http://scholar.google.com/scholar_case?case=5611743257260213119&q=mcdonald+v+hogness&hl=en&as_sdt=2,48&as_vis=1
- Grutter v Bollinger (Univ. of Michigan) 539 U.S. 306 (2003). In this case the court upheld an affirmative action plan for law school admission. Concentrate on the discussion about academic freedom in O’Connor’s majority opinion.
http://scholar.google.com/scholar_case?case=5183084208914209139&q=grutter+v+michigan&hl=en&as_sdt=2,48&as_vis=1
- Gratz v Bollinger 539 U.S. 244 (2003).
http://scholar.google.com/scholar_case?case=6805287674686880550&q=gratz+v+bollinger&hl=en&as_sdt=4,60

Section 7

- Review this case from Section 4 in relation to the subject matter of Section 7: Keefe v. Adams, et al (Central Lakes College – Minn.), U. S. Dist. Ct. D. Minn. August 26, 2014.
http://scholar.google.com/scholar_case?q=keefe+v+adams&hl=en&as_sdt=3,24&case=974206745385272016&scilh=0
- First and Fourteenth Amendments to the United States Constitution.
<http://constitutionus.com/>
- Provisions regarding freedom of speech and expression in your state constitution.
<http://www.constitution.org/cons/usstcons.htm>
- Pickering v Board of Education 91 U.S. 563 (1968).
http://scholar.google.com/scholar_case?case=16997195768089298466&q=pickering+v+board+of+education&hl=en&as_sdt=2,48&as_vis=1



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- *Tinker v Des Moines School District* 393 U.S. 503 (1969).
http://scholar.google.com/scholar_case?case=15235797139493194004&q=tinker+v+des+m+oines+school+district&hl=en&as_sdt=2,48&as_vis=1
- *Renken v Gregory* 541 F3d 769 at 773 (7th Cir 2008).
http://scholar.google.com/scholar_case?case=2174956880881528144&q=renken+v+gregor+y&hl=en&as_sdt=2,48&as_vis=1
- *Cohen v California* 403 U.S. 15 at 25 (1971).
http://scholar.google.com/scholar_case?case=7398433541275578772&q=cohen+v+californi+a&hl=en&as_sdt=2,48&as_vis=1
- *Virginia v Black* 538 U.S. 343 at 359 (2003).
http://scholar.google.com/scholar_case?case=2729037874515332053&q=virginia+v+black&hl=en&as_sdt=2,48&as_vis=1

Section 8

- ADA Amendments Act of 2008.
<http://www.govtrack.us/congress/billtext.xpd?bill=s110-3406>
- EEOC Q and A for ADA (View Resources, Word document)
- EEOC 2013 Q and A Regarding Diseases (View Resources, Word document)
- EEOC Q and A Regarding Employment and Students (View Resources, Word document)

Section 9

- University of Washington Policy on Liability Coverage
<http://www.washington.edu/admin/rules/policies/APS/14.01.3.html>
- University of Washington Policy on Indemnification of University Personnel, (Chapter 5)
<http://www.washington.edu/admin/rules/policies/BRG/SOCh5.html>
- University of Washington policy on Legal Procedures Involving the University and Its Personnel Section 2. B. (Executive Order 19)
<http://www.washington.edu/admin/rules/policies/PO/EO19.html#2>
- *Moore v Vanderloo*, 386 N.W. 2d 108, 112-115 (Iowa, 1986).
http://174.123.24.242/leagle/xmlResult.aspx?xmlDoc=1986494386NW2d108_1488.xml&docBase=CSLWAR2-1986-2006
- EEOC Q and A: Compiled questions and answers prepared by the EEOC regarding the application of the ADA to Employees; pp 1-61. Each time the word "Employer" is used you may substitute the word "Institution" in its place and each time the word "Employee" is used you may substitute the word "Student" in its place. In nearly every instance the Questions and Answers will apply with equal force in an academic program. All of the materials in the EEOC Q and A resource document are in the public domain and may be freely copied.
- Compiled questions and answers prepared by the EEOC regarding the application of the ADA to Employees; pp 1-53. Each time the word "Employer" is used you may substitute the word "Institution" in its place and each time the word "Employee" is used you may substitute the word "Student" in its place. In nearly every instance the Questions and Answers will apply with equal force in an academic program. All of the materials in the EEOC Q and A resource document are in the public domain and may be freely copied. (View Resources, Word document)



Education Leadership Institute
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Recommended Readings

Black's Law Dictionary – www.dictionary.law.com or www.nolo.com/dictionary

Cameron CA, Meyers LE, Olswang SG. Academic Bill of Rights: Conflict in the Classroom, 31. *Journal of College and University Law*. 243 (2005).

Kaplin WA, Lee BA. *The Law of Higher Education. Student Version, 5th Edition*. San Francisco: Jossey Bass; 2014. ISBN: 978-1-1180-03662-4, [E-book], \$78.99; [Hard cover], \$98.00.

Kaplin WA, Lee BA. *The Law of Higher Education. 2 volumes, 5th Edition*. Hoboken, NJ: Jossey-Bass; 2013. ISBN: 978-0-7879-8659-9, hardcover, \$350



Education Leadership Institute Module 5 – Legal and Policy Issues

Definitions

Chilling effect principle: The judicial concept that a statute, regulation, or institutional policy is unconstitutional because it is overly broad is based on the “chilling effect” principle, which is the inhibition or discouragement of speech for fear of prosecution or sanction. Overbreadth is primarily responsible for nearly all institutions’ policies on hate speech that have been challenged, have been found wanting, or have been determined to be unconstitutional.

Duty of care: A duty of care toward another person or property arises when it is reasonably foreseeable that injury or loss will likely occur if the duty is not exercised. Liability attaches if it is proven that the injury was the result of the failure to exercise the requisite duty of care, ie, the breach of the duty caused the injury.

Educational malpractice claim: This claim may be brought for the provision of what is alleged to be bad advice by an institution employee to a student. Examples would include advice that affects the student’s ability to graduate on time or affects his or her athletic eligibility. Another form of this type of claim is one that is brought for alleged inadequate instruction and they are not favored by the courts.

Freedom of speech: Under the Fourteenth Amendment, we may not be deprived of our liberty (the right to freedom of speech) “without due process of law.” Stated in the reverse, if due process of law is followed, we may be deprived of our freedom of speech in certain circumstances.

Hate speech: this is an “imprecise catch-all term that generally includes verbal and written words and symbolic acts that convey a grossly negative assessment of particular individuals or groups based on their race, gender, ethnicity, religion, sexual orientation, or disability. Hate speech is thus highly derogatory and degrading, and the language is typically coarse.”

Kaplin WA, Lee BA. The Law of Higher Education. 2 volumes, 4th Edition. Hoboken, NJ: Jossey-Bass; 2006.

Negligent computer or information technology security: This type of negligence involves the failure to take adequate precautions to prevent access to the institution's records, listservs, e-mail systems, etc.

Negligent hiring: Generally, someone may claim this based a person being hired who obviously was not competent to perform the required tasks and a person was injured as a result; it is a relatively new area of litigation.

Negligent retention claim: This type of claim involves the retention of an employee whose actions or performance over a significant period of time has been deficient, malicious, incompetent, or otherwise inadequate to the point that someone is injured or damaged. In situations in which it is readily foreseeable that the continued retention of the person will lead to someone's injury, the failure to act is negligence.



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Personal liability: This liability arises from “acts taken in bad faith,” deliberate, willful, intentional, conscious acts that the person knew or clearly should have known would cause injury. Such acts would include those (a) committed with the willful intention of causing injury or harm, (b) that were reckless or malicious in nature, (c) committed in willful violation of law or institution regulations, or (d) committed while under the influence of alcohol or a controlled substance.

Tort: A tort is a civil wrong; an action that causes injury or property damage for which the courts or statutory law allows a remedy, usually a monetary one. A criminal wrong (ie, a crime) also may cause injury or loss but generally requires an intent to cause harm or a disregard for the risk for causing harm and is punished by a fine and/or incarceration. Civil wrongs themselves are not punished by fines or incarceration unless they also include crimes.

Assignments/Activities Summary Checklist

Checklist

Section 1 – Controversy Documentation: E-mail, Voicemail, and Disclosure Issues

- ✓ Research Activity: Identify and Review Document Retention Policies (slides 5 and 6)
- ✓ Journaling Activity: Case 1 Next Steps (slide 10)
- ✓ Activity: Reflecting on Communication Best Practices (slide 12)
- ✓ Research Activity: Requests for Records (slide 17)
- ✓ Research Activity: Assignments (slide 19)

Section 2 – Risk Management

- ✓ Research Activity: Review Risk Management Policies and Incident Forms (slides 5 and 6)
- ✓ Activity: Case 2 Reflection (slide 8)
- ✓ Journaling Activity: Considering Other Related Issues (slide 15)

Section 3 – Affiliation Agreements

- ✓ Research Activity: Review Affiliation Agreements (slide 4)
- ✓ Activity: Reflecting on Authority Over Student-Related Matters (slide 11)
- ✓ Research Activity: Review Background Check Policies (slide 14)
- ✓ *Discussion Forum: Background Checks (slide 17)*
- ✓ Research Activity: Review Policies Regarding Exposure to Infectious Fluids (slide 19)



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- ✓ Activity: Documenting Biohazard Policies in the Affiliation Agreement (slide 22)
- ✓ Research Activity: Review Policies Regarding Paid Positions at Clinical Education Sites (slide 26)
- ✓ Assignments: Section 3 (slide 30)

Section 4 – Faculty and Student Grievances and Misconduct

- ✓ Research Activity: Review Grievance Policies and Procedures (slides 7 and 8)
- ✓ Activity: Reflecting on Jane’s Communications (slide 9)
- ✓ *Discussion Forum: Faculty Computers (slide 14)*
- ✓ Activity: Reflection Question (slide 17)
- ✓ Journaling Activity: Drafting a Letter of Violation to Jane (slide 23)
- ✓ Activity: Reflecting on Jack’s Sanctions (slide 29)
- ✓ Journaling Activity: Writing a Letter to Jack (slide 32)
- ✓ *Discussion Forum: Releasing Education Records (slide 35)*
- ✓ Journaling Activity: Considering the Case in a New Light (slide 41)
- ✓ Assignments for Case 1 (slide 42)

Section 5 – Religious Freedom Issues

- ✓ Research Activity: Review Policies and Laws Related to Religious Activities on Campus (slides 7 and 8)
- ✓ Reflective Activity: Consider Sam’s Free Exercise Rights (slide 13)
- ✓ Reflective Activity: Inquiring About Patients’ Spiritual Needs (slide 18)
- ✓ Journaling Activity: Respond to Sam’s and Martha’s Cases (slide 21)
- ✓ *Discussion Forum: Considering Your State Constitution (slide 22)*
- ✓ Activity: Reflecting on Blanket Prohibitions (slide 28)
- ✓ Activity: Reflecting on Classroom Prayer Within a Private Institution (slide 33)
- ✓ Journaling Activity: Respond to Tom (slide 36)
- ✓ *Discussion Forum: Discuss Crystal’s Plans to Wear a Burqa (slide 38)*

Section 6 – Academic Freedom: The Institution, Faculty, and Students

- ✓ Research Activity: Review Academic Freedom Policies and Resources (slides 10 -12)
- ✓ Activity: Recalling the 3 Tenets of Faculty Academic Freedom (slide 18)



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- ✓ Activity: Revisiting Lawsuit 1 Reflection Question (slide 28)
- ✓ Activity: Reflecting on Pete’s Lawsuit from 2 Perspectives (slide 32)
- ✓ Journaling Activity: Write a Letter to Pete (slide 39)
- ✓ Journaling Activity: Write a Letter to the 3 Students (slide 42)
- ✓ Research Activity: Refusing to Counsel a Patient/Client on Religious Grounds (slide 43 and 44)
- ✓ Research Activity: Is the State Legislature the Ultimate Arbiter of Academic Freedoms? (slide 56)
- ✓ Journaling Activity: The Student Refusing to Treat a Patient on Religious Grounds (slide 59)
- ✓ Activity: Revisiting Case 10: Objections to New Admissions Process (slide 66)

Section 7 – Freedom of Speech and Hate Speech

- ✓ Research Activity: Review Freedom of Speech and Hate Speech Sources (slides 10 and 11)
- ✓ Journaling Activity: Write a Letter to Fred (slide 25)
- ✓ Journaling Activity: Write a Letter to Thelma (slide 30)
- ✓ Journaling Activity: Responding to the Case of Doyle, the Outspoken Student (slides 31-33)
- ✓ *Discussion Forum: Determining Who Is the Disruptor (slides 66 and 67)*

Section 8 – Working With Institutional Legal Counsel

- ✓ Research Activity: Review Definitions and Policies Related to Legal Counsel (slides 10 and 11)
- ✓ Activity: Preparing for a Meeting With Your Legal Counsel (slide 22)
- ✓ Activity: Create a Notebook (slide 33)
- ✓ Research Activity/Part 1: Review Policies and Procedures and Meet With Your Legal Counsel (slide 38)
- ✓ Research Activity/Part 2: Ask Your Legal Counsel to Review Your Program’s Policies and Procedures (slide 39)

Section 9 – Liability of Employees, Faculty, and Administrators

- ✓ Research Activity: Review Liability- and Indemnification-Related Policy (slide 6)
- ✓ Activity: Reflecting on Case 18 (slide 14)
- ✓ *Discussion Forum: Discuss the Theft of John's Computer (slide 20)*



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- ✓ Research Activity: Applying the Rules (slide 27)
- ✓ Stop and Think: Negligent Supervision (slide 37)
- ✓ Activity: Liability Examples (slide 41)



**Module 6 –
Human Resources Management
*Module Resources***



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Module 6 – Human Resources Management

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Module 6 – Human Resources Management

Outcome Objectives

After completing this module, you should be able to:

- Explain the evolution of the profession of human resources and how that evolution has affected higher education in the United States. (Section 1)
- Evaluate the components of the talent management processes for faculty and staff in a higher-education environment, and evaluate the efficacy of the faculty and staff promotion process. (Section 2)
- Recall the definition of total compensation and create a total compensation flow chart for your institution. (Section 3)
- List and describe the features of effective employee relations strategies, programs, and initiatives for faculty and staff; and repeat and recall the various issues associated with workload matters, tenure, institutional governance, and collegiality. You will also be able to discuss matters related to unions and union relations. (Section 4)
- Describe the various factors that influence a multigenerational workplace. You will be able to recall the effects these factors have on human resources programming. You will also be introduced to the changing demographics of the professorate, the future supply shortage within the academic leadership pipeline, and managerial steps that can positively impact it. (Section 5)
- Evaluate the elements of effective health and productivity measures – measures that reach beyond traditional medical and fringe benefits packages. These will include wellness-related components as well as work-life practices. (Section 6)
- Deeper appreciation for the major employment-related case laws and legislation that impact the higher education environment. (Section 7)
- Evaluate the various structural features and aspects of a college or university strategic plan, including organization development, workforce development, succession planning, diversity programming, and workforce planning programs. (Section 8)
- Recall and articulate the policies and procedures necessary to partner effectively with your human resources office. (Section 9)



Education Leadership Institute Module 6 – Human Resources Management

Faculty Biography



James E. Kemper, PhD, SPHR, is the vice president for administration at Zane State College in Zanesville, Ohio. At Zane State College he oversees 5 departments including Human Resources, Information Technology Services, Institutional Research, Adjunct Services, and Secondary and Strategic Initiatives. Prior to joining Zane State, Kemper was the director of human resources for Longaberger Inc. and director of organization and human resource consulting for The Ohio State University. He also was associate vice president and chief human resources officer at Ohio University for over 20 years. Kemper also has worked for the Anchor Hocking Corporation and as an independent consultant. He has held adjunct teaching roles for Ohio University's College of Business Administration and for Hocking College.

Dr Kemper has bachelor and master degrees in business administration from Ohio University and an SPHR lifetime certification from the Human Resource Certification Institute in Washington DC. He received his PhD in higher education administration from Ohio University in 2001. His dissertation, which has been replicated twice, was titled "The Role of the Human Resource Office in the Collegiate Environment: Identifying the Components of Being a Strategic Partner."

He has published numerous human resources-related articles in trade journals including *The Higher Education Workplace*, *The Business Officer*, and *Capacity*.

Kemper is a member of The Society for Human Resource Management (SHRM) and the College and University Professional Association for Human Resources (CUPA-HR).

He and his wife, Jenny, have 4 married, grown children and 9 young grandchildren.



Education Leadership Institute
Module 6 – Human Resources Management

Faculty Virtual Office Hours - Module 6

- Friday, January 29, 2016; 10:00 am - 12:00 pm ET
- Wednesday, February 10, 2016: 11:00 am - 1:00 pm ET (Adobe Virtual Webinar Session)
- Monday, February 22, 2016: 2:00 pm - 4:00 pm ET

Readings

Required Readings

Section 1

- Tead O. Personnel Administration: Its Principles and Practices. New York: McGraw-Hill Book Company Ltd; 1920. (Google e-book) (Section 1)
http://books.google.com/books/about/Personnel_administration.html?id=QG1EAAAIAAJ
 (Chapters 3 and 4, Appendix)
- “23 potential functions of a human resources office” in: Kemper JE. The role of the human resources office in the collegiate environment. *Dissertation Abstracts International*. Ohio University; 2001.

Section 2

- Suggested articles:
 - http://www.sibson.com/publications/perspectives/Volume_17_Issue_3/building-tm.html
 - <http://www.hreonline.com/HRE/> Click on ‘Talent Management’

Section 3

- College and University Professional Association for Human Resources (CUPA-HR); www.cupahr.org. (Requires a username and password from the faculty member.)

Section 4

- [American Association of University Professors](http://www.aaup.org/AAUP/issues/governance) (AAUP) “Statement on Government of Colleges and Universities” (1966); www.aaup.org/AAUP/issues/governance.
- American Association of University Professors. “Some Implications of Tenure for the Profession and Society;” www.aaup.org/AAUP/issues/tenure.
- Better Together: University of Michigan’s Labor Management Partnership. *The Higher Education Workplace*. Winter 2010-1;2(3):19.
- Rethinking a Reduction in Force. *The Higher Education Workplace*. Winter 2010-1;2(3):31.



Education Leadership Institute
Module 6 – Human Resources Management

Section 5

- Jones RT. The New American Workforce: Challenges and Opportunities for Higher Education. Education Workforce Policy, LLP. <http://www.educationworkforcepolicy.com/> Click on 'Publications'; Click on 'Papers'.
- American Council on Education. Too Many Rungs on the Ladder. Faculty Demographics and the Future Leadership of Higher Education. ACE Policy for Analysis Issue Brief. September 2008:1-12.
http://www.cupahr.org/knowledgecenter/Too_Many_Rungs_Article.pdf
 (You will need a username and password to access.)
- Robinson R. Millennials: Problems or prodigies? *PharmaVOICE*. January, 2011.(to order pdf, reprint, back issue) http://www.pharmavoices.com/archives/article_esiml?id=2159
- Introducing Generation Z, Human Resource Executive, September, 2014.
www.hreonline.com
 - <http://www.hreonline.com/HRE/>
 Search for 'Introducing Generation Z'

Section 6

- Carter M. Authenticity Consulting LLC. Adapted from: Performance Management – Basic Concept. *Field Guide to Consulting and Organizational Development*.
<http://managementhelp.org/> .
 - Search for 'Performance Management' and click on 'Performance Management: overall goal and basic steps.'
- McIlvaine AR. Innovations in wellness. *Human Resource Executive*. April 1, 2011.
<http://www.hreonline.com/HRE/>
 - Search for 'Innovations in Wellness'

Section 7

- National Association of College and University Attorneys (NACUA); Legal Reference Service. <http://www.nacua.org/lrs/documents.asp>.
 - From 150 current legal topics related to public and private colleges and universities, read the content of 3 of these topics related to human resources.
- First Amendment: [Sadid v Idaho State University, et al](#). December 5, 2011.
- Faculty: [Rose v Whittier College](#). November 14, 2011.
- Academic Freedom: A Guide to Academic Freedom. November 14, 2011.
http://www1.cuny.edu/mu/vc_la/2012/01/02/a-guide-to-academic-freedom/
- The Ohio University's Policy and Procedures. Institutional policies.
<http://www.ohio.edu/policy/numeric.html#ADMINISTRATIVE>.
 - Attend to the policies that begin with 40. Peruse the various titles of the dozens of administrative policies.
 - Read policies 40.001, 40.023, and 40.033.
- Faculty Handbook. <http://www.ohio.edu/facultysenate/handbook/>.
 - Peruse the table of contents of the handbook and read sections II(f), II(i), II(q)



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Section 8

- Search for article by Christie S. 2005 – Succession Planning: There are no magic bullets; *Policy & Practice*. September 2005;63(3)
- Diversity programming. Virginia Tech Diversity Strategic Plan. <http://www.vt.edu> Search for 'Diversity Strategic Plan'.
- Workforce planning programs. View Key Elements and Suggested Performance Indicators:1-9. http://www.opm.gov/hcaaf_resource_center/3-4.asp.

Section 9

- Conduct an information search on “HR Policies” on the CUPA-HR Web site’s Knowledge Center: <http://www.cupahr.org>.
- The Ohio University’s Policy and Procedures. Institutional policies. <http://www.ohio.edu/policy/numeric.html#ADMINISTRATIVE>.
 - Attend to the policies that begin with 40.

Recommended Readings

Section 7

- Kaplin WA, Lee BA. *The Law of Higher Education: A Comprehensive Guide to Legal Implications of Administrative Decision Making*. (3rd Ed) San Francisco: Jossey Bass; 1995. [Title IX of the Civil Rights Act of 1964](#).



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Assignments/Activities Summary Checklist

Checklist

Section 1 – History and Evolution of Higher-Education Human Resources Management

- ✓ Research Activity: Applied History (slide 3)
- ✓ Stop and Think: Personnel Administration Course (slide 6)
- ✓ Stop and Think: Evolution of Human Resources (slide 11)

Section 2 – Talent Management Process

- ✓ Research Activity: Talent Management (slide 3)
- ✓ Research and Journaling Activity: Talent Management Process at Your Institution (slide 4)
- ✓ Stop and Think: Recruiting (slide 9)
- ✓ Stop and Think: Staffing and Recruiting (slide 11)
- ✓ Journaling Activity: Talent Management Processes (slide 19)

Section 3 – Total Compensation Concepts

- ✓ Interview Activity: Total Compensation (slide 3)
- ✓ Research and Journaling Activity: Total Compensation (slide 5)
- ✓ Stop and Think: Total Compensation (slide 11)
- ✓ Stop and Think: Extrinsic and Intrinsic Rewards (slide 15)

Section 4 – Employee Relations Practices

- ✓ Required Activity: Employee Relations (slide 5)
- ✓ Stop and Think: Employee Relations at Your Institution (slide 7)
- ✓ Stop and Think: Communication Programs (slide 10)
- ✓ Stop and Think: Participatory Management (slide 12)
- ✓ Stop and Think: Tenure (slide 17)



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Section 5 – Changing Demographics in the Education Workforce

- ✓ Stop and Think: Demographic Changes (slides 9 - 10)
- ✓ Journal Activity: Collect Demographic Data (slide 11)

Section 6 – Health and Productivity Management

- ✓ Stop and Think: Performance Management (slide 4)
- ✓ Stop and Think: Health Management/Wellness (slide 6)
- ✓ Research and Journaling Activity: Health Management at Your Institution (slide 7)
- ✓ Stop and Think: Defining Productivity Management (slide 8)
- ✓ Stop and Think: Culturally Appropriate Evaluation (slide 11)
- ✓ Stop and Think: Your Productivity Management (slide 13)
- ✓ Research and Journaling Activity: Productivity Management at Your Institution (slide 14)

Section 7– Legal and Compliance Issues

- ✓ Stop and Think: Legal Issues (slide 5)
- ✓ Stop and Think: Legal Issues (slide 7)
- ✓ Stop and Think: Legal Issues (slide 9)
- ✓ Stop and Think: Compliance (slide 13)
- ✓ Research and Journaling Activity: Legal and Compliance Issues (slide 14)

Section 8 – Strategic Planning

- ✓ Required Reading: Reflection and Journaling (slide 4)
- ✓ Required Reading: Reflection and Diversity (slide 5)
- ✓ Required Reading: Reflection, Journaling, and Workforce (slide 6)
- ✓ Research Activity: Your Institution's Plan (slide 9)
- ✓ Research Activity: Applying the Diagnostic Tool (slide 10)
- ✓ Stop and Think: The HR Strategic Plan (slide 14)



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Section 9 – Policies and Procedures for Human Resources Officers

- ✓ Required Activities: Information Search, Reading, and Journaling (slides 3 and 4)
- ✓ Journaling Activity: Policies and Procedures (slide 5)
- ✓ Stop and Think: Comparing Policies and Practices (slide 6)
- ✓ Stop and Think: Policies (slide 12)
- ✓ *Discussion Forum: Questions (slide 13)*
 - In what ways do members of the Human Resources staff partner with your office?
 - How is the office of Human Resources at your institution considered a strategic partner?
 - What would you say are the 1-to-3 salient issues that Human Resources at your institution need to address over the coming year? Why?

References

- American Association of University Professors. <http://www.aaup.org>.
- Balderston FE. *Managing today's university*. San Francisco: Jossey-Bass; 1995.
- Bardwick J. *Danger in the comfort zone*. New York: AMACOM; 1991.
- Bergquist WH. *The four cultures of the academy*. San Francisco: Jossey-Bass; 1992.
- Birnbaum R. *How colleges work: The cybernetics of academic organization leadership*. San Francisco: Jossey-Bass; 1988.
- Carrell MR, Kuzmits FE, Elbert NF. *Personnel human resource management*. Columbus, OH: Merrill Publishing Co; 1989.
- Castetter WB, Young IP. *The human resource function in educational administration*. Columbus, OH: Merrill Publishing Co; 1996.
- College and University Professional Association for Human Resources, Washington, DC. <http://www.cupahr.org>.
- Collins J. *Good to Great*. New York: Harper Collins Publishers; 2001.
- Edwards R. Can post-tenure review help us save the tenure system? *Academe*. 1997;83(3):26-31.
- Eichinger RW, Ulrich D. *Human resource challenges: Today and tomorrow: monograph*. New York: Human Resource Planning Society; 1995.
- Fitz-enz J. *How to measure human resources management*. New York: McGraw-Hill; 1995.
- French WL. *Human resources management*. Boston: Houghton-Mifflin; 1994.
- Gomez-Mejia LR, Balkin DB, Cardy RL. *Managing human resources*. Englewood Cliffs, NJ: Prentice Hall; 1995.
- Harrison R. *Human resource management: Issues and strategies*. Workingham, England: Addison-Wesley Publishing Company; 1993.
- Heneman HG, Schwab DP, Fossum JA, Dhyer LD. *Personnel/human resource management*. Homewood, IL: Irwin; 1989.
- HR Executive*. <http://www.hreonline.com>.
- Millenials: problems or prodigies?. *PharmaVOICE*, January, 2011.
- National Association of College and University Attorneys. <http://www.nacua.org>.
- Office of Personnel Management for the Federal Government. <http://www.opm.gov>.



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Ohio University. <http://www.ohio.edu>.

Peterson MW. AAUP/ACE/AGBCU. Statement on government of colleges and universities. In: Peterson MW (Ed). *Organization and Governance in Higher Education: An ASHE Reader*. (4th ed) Needham Heights, MA: Simon and Schuster; 1991.

Rothwell WJ, Prescott RK, Taylor MW. *Strategic Human Resource Leader: How to Prepare Your Organization for the Six Key Trends Shaping the Future*. Palo Alto, CA: Davies-Black Publishing; 1998.

Rothwell WJ. *A 21st-Century Vision of Strategic Human Resource Management*. New York: SHRM/CCH Inc; 1996.

Saratoga Institute. *Restructuring the Human Resources Department*. New York: American Management Association; 1997.

Schein EH. *Organizational Culture and Leadership*. San Francisco: Jossey-Bass; 1992.

Society of Human Resource Management, Washington, D.C. <http://www.shrm.org>.

Virginia Tech. <http://www.vt.edu>.

Ulrich D. *Human resource champions*. Boston: Harvard Business School Press; 1997.

Vicere A, Prescott RK. <http://www.smeal.psu.edu/psep/>. 1997.

Warner D, Crosthwaite E (Eds). *Human Resource Management in Higher and Further Education*. London: Open University Press; 1995.

Weber RA. *Management*. Homewood, IL: Richard D. Irwin Inc; 1975.

Wechsler HS, Goodchild LF, Eisenmann L. *History of American Higher Education (3rd Edition)*. Boston, MA: Pearson Learning Solutions; 2007.

Whalen EL. *Responsibility Center Budgeting*. Bloomington, IN: Indiana University Press; 1991.

Winning a seat at the table requires a record of performance. *HR on campus*. 2000;3(2).



Module 7
Resources/Financial Management
Module Resources



Education Leadership Institute
Module 7 – Resources/Financial Management

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Outcome Objectives

After completing this module, you should be able to:

1. Describe the stream of revenues and expenditures in higher education and how they are managed.
2. Describe the purpose, organization, and content of the various reports that communicate the financial condition of your institution and discuss how these documents are impacted by changing financial scenarios.
3. Describe some of the common tools available to monitor the financial condition of an institution of higher education.
4. Explain the key principles of endowment management, be able to identify the fundamental components of a successful fundraising program, and discuss the link between these 2 activities.
5. Explain how to find grant opportunities for your program and the resources available to assist pre-award and post-award.



Education Leadership Institute
Module 7 – Resources/Financial Management

Faculty Biography



Melanie Gehen, MHSA
Vice President and CFO

Melanie F. Gehen is the vice president for academic fiscal affairs at State University New York (SUNY) Downstate Medical Center and interim vice president for finance and CFO. She provides leadership in the provision of financial and business services that enable the medical center to achieve stated academic, clinical and research operational and strategic goals and objectives. Prior to her position at SUNY Downstate she was the associate vice president for health economics at the George Washington University (GWU). She served as the senior advisor on fiscal and administrative matters for the George Washington University Medical Center. She was as a member of the university's Financial Operations Review Group, Policy Steering Committee, and Benefits Advisory Committee. She also was the interim vice provost for medical center finances where she served on the leadership team that was charged with a reorganization of the medical center aimed at strengthening academic and managerial capacity. Prior to her position as associate vice president she served as interim chief financial officer and director of finance for the George Washington University Medical Faculty Associates, a multispecialty group practice. During her tenure she directed the overall financial operations of the group practice. She also has experience in practice group administration and nursing home business operations. She is a member of the American Association of Medical Colleges and National Association of Colleges and University Business Officers. She holds a master's degree in health services administration from GWU and a bachelor's degree from Rochester Institute of Technology. Raised in upstate New York, she currently resides in northern Virginia with her family.



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Module 7 – Resources/Financial Management

Faculty Virtual Office Hours – Module 7

- Tuesday, March 29, 2016; 8:00 pm-10:00 pm EDT
- Saturday, April 9, 2016; 10:00 am – 12:00 pm EDT (Adobe Webinar session)
- Wednesday, April 20, 2016; 7:00 pm – 9:00 pm EDT

Readings

Required Readings

Required Texts

- Barr MJ, McClellan GS. *Budgets and Financial Management in Higher Education*. San Francisco CA: John Wiley & Sons Inc; 2011.
- Yeager JL, Nelson GM, Potter EA, Weidman JC, Zullo TG. *ASHE Reader on Finance in Higher Education*, 2nd ed. Boston, MA: Person Custom Publishing; 2001.

Section 1

- Barr MJ, McClellan GS. *Budgets and Financial Management in Higher Education*. San Francisco CA: John Wiley & Sons Inc; 2011:1-28, 29-53, 55-85, 109-115, 139-162, 163-184.
- Hauptman AM. Financing American higher education in the 1990s. In: Yeager JL, Nelson GM, Potter EA, Weidman JC, Zullo TG, eds. *Finance in Higher Education*, 2nd ed. ASHE Reader Series. Boston, MA: Pearson Custom Publishing; 2001:115-126.
- Waggaman J. Managing the costs of higher education. In: Yeager JL, Nelson GM, Potter EA, Weidman JC, Zullo TG, eds. *Finance in Higher Education*, 2nd ed. ASHE Reader Series. Boston, MA: Pearson Custom Publishing; 2001:301-315.
- Lasher, WF, Greene, DL. College and university budgeting: what do we know? What do we need to know? In: Yeager, JL, Nelson, GM, Potter, EA, Weidman, JC, Zullo, TG,



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eds. *Finance in Higher Education, 2nd ed.* ASHE Reader Series. Boston, MA: Pearson Custom Publishing; 2001:475-502.

- Schmidtlein FA. Why linking budgets to plans has proven difficult in higher education. In: Yeager, JL, Nelson, GM, Potter, EA, Weidman, JC, Zullo, TG, eds. *Finance in Higher Education, 2nd ed.* ASHE Reader Series. Boston, MA: Person Custom Publishing; 2001: 415-424.
- Brinkman PT, Morgan AW. Changing fiscal strategies for planning. In: Yeager, JL, Nelson, GM, Potter, EA, Weidman, JC, Zullo, TG, eds. *Finance In Higher Education 2nd ed.* ASHE Reader Series. Boston, MA: Pearson Custom Publishing; 2001:425-436.
- Chabotar JK, Honan JP. Coping with retrenchment: Strategies and tactics. *Change*. Nov/Dec 1990:28-34.

Section 2

- Cash Accounting
<http://www.khanacademy.org/video/cash-accounting?topic=core-finance>
- Accrual Accounting
<http://www.khanacademy.org/science/core-finance/accounting-and-financial-statemente/cash-accrual-accounting/v/accrual-basis-of-accounting>
- Comparing Accrual and Cash Accounting
<http://www.khanacademy.org/science/core-finance/accounting-and-financial-statemente/cash-accrual-accounting/v/comparing-accrual-and-cash-accounting>
- Balance Sheet and Income Statement Relationship
<http://www.khanacademy.org/video/balance-sheet-and-income-statement-relationship?topic=core-finance>
- Interpreting the Balance Sheet Tutorial <https://www.khanacademy.org/economics-finance-domain/core-finance/accounting-and-financial-statemente/financial-statements-tutorial/e/interpreting-the-balance-sheet>
- Interpreting the Income Statement Tutorial <https://www.khanacademy.org/economics-finance-domain/core-finance/accounting-and-financial-statemente/financial-statements-tutorial/e/interpreting-the-income-statement-2>
- Basic Cash Flow Statement
<http://www.khanacademy.org/video/basic-cash-flow-statement?topic=core-finance>



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- Meisinger RJ, Jr, Dubeck LW. Fund accounting (1984) In: Yeager JL, Nelson GM, Potter EA, Weidman JC, Zullo TG, eds. *Finance in Higher Education, 2nd ed.* ASHE Reader Series. Boston, MA: Pearson Custom Publishing; 2001: 503-527.
- With the basic knowledge obtained from the tutorials, study *The Merrill Lynch Guide to Understanding Financial Reports*, at: <http://www.imd.org/uupload/webToolWWW/5345/Document/Understanding%20Financial%20Reports%20by%20Merrill%20Lynch.pdf>. The following pages are relevant/applicable to higher education: 5-13, 22-26, 36-37 (original document page numbers).

Section 3

- Chabotar KJ. Financial ratio analysis comes to nonprofits. *The Journal of Higher Education*. March 1989;60(2):188-208. <http://geekyartistlibrarian.pbworks.com/f/Finance%2B-%2BChabotar%2BArticle%2B1.pdf>. Accessed January 14, 2014.
- Chabotar KJ. Will your institution pass the financial-responsibility test? *Trusteeship*. July/August 2011; 19, 4:30-33.
- 2015-2016 Federal Student Aid Handbook with Active Index, Volume 2. *School Eligibility and Operations*. Chapter 4: 2-70 thru 78. (PDF page numbers 76-172) <https://ifap.ed.gov/fsahandbook/attachments/1516FSAHbkVol2Master.pdf> Accessed December 6, 2015
- Hignite K. Diagnosing fiscal fitness. *Business Officer Magazine*. April 2009. http://www.nacubo.org/Business_Officer_Magazine/Magazine_Archives/April_2009/Diagnosing_Fiscal_Fitness.html. Accessed December 6, 2015.

Section 4

- Lord M, Throneburg W. Smoother spending. *Business Officer Magazine*. February 2007. http://www.nacubo.org/Business_Officer_Magazine/Magazine_Archives/February_2007/Smoother_Spending.html. Accessed November 30, 2015.
- Morrell LR. Integrating spending policy into asset allocation strategy. In: Yeager JL, Nelson GM, Potter EA, Weidman JC, Zullo TG. *FASHE Reader on Finance in Higher Education, 2nd ed.* Boston, MA: Pearson Custom Publishing; 2001:262-266.
- Nahm R, Zemsky RM. The role of institutional planning in fund-raising. In: Yeager JL, Nelson GM, Potter EA, Weidman JC, Zullo TG. *ASHE Reader on Finance in Higher Education, 2nd ed.* Boston, MA: Pearson Custom Publishing; 2001; 267-270.



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- Redd KE. Breaking the surface. *Business Officer Magazine*. March 2011. http://www.nacubo.org/Business_Officer_Magazine/Magazine_Archives/March_2011/Breaking_the_Surface.html. Accessed November 30, 2015.
- Redd KE. Surviving a wild ride. *Business Officer Magazine*. November 2009. http://www.nacubo.org/Business_Officer_Magazine/Magazine_Archives/November_2009/Surviving_a_Wild_Ride.html. Accessed November 30, 2015.
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- Tharp C. Growing the endowment in a high-risk environment. In: Yeager JL, Nelson GM, Potter EA, Weidman JC, Zullo TG. *ASHE Reader on Finance in Higher Education, 2nd ed*. Boston, MA: Pearson Custom Publishing; 2001: 255-261.
- Yoder JA. Proper management yields big dividends. In: Yeager JL, Nelson GM, Potter EA, Weidman JC, Zullo TG. *ASHE Reader on Finance in Higher Education, 2nd ed*. Boston, MA: Pearson Custom Publishing; 2001: 271-274.

Recommended Readings

Section 1

- Massy WF. Improvement strategies for administration and support services. In: Yeager JL, Nelson GM, Potter EA, Weidman JC, Zullo TG, eds. *Finance in Higher Education, 2nd ed*. ASHE Reader Series. Boston, MA: Pearson Custom Publishing; 2001:316-336.
- Rethinking Conventional Wisdom About Higher Ed Finance. http://www.deltacostproject.org/resources/pdf/advisory_10_Myths.pdf. Accessed November 12, 2015.

Section 2

- Berman K, Knight J. *Financial Intelligence: A Manager's Guide to Knowing What the Numbers Really Mean*. Boston MA: Harvard Business School Press; 2006.
- Tracy JA. *How to Read a Financial Report Wringing Vital Signs out of the Numbers*. Hoboken NJ: John Wiley & Sons Inc; 2009.

Section 3



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- Prager S & Co LLC, KPMG LLP, Attain LLC. *Strategic Financial Analysis for Higher Education Identifying, Measuring & Reporting Financial Risks, 7th Ed.* USA: NACUBO; 2010.

Section 4

- Neal N. *Principled Fundraising 101: A Workbook for Learning the Basic Facts About Fundraising.* http://www.augmentdirect.com/downloads/Principled_Fundraising101.pdf Accessed November 30, 2015.
- Griswold JS. *New World, New Reality: Rethinking the Governance Model for Nonprofit Investment Management.* Wilton, CT: Commonfund Institute. http://www.commonfund.org/investorresources/publications/white%20papers/whitepaper_new%20world%20new%20reality%20-%20rethinking%20governance_2011.pdf. Accessed November 30, 2015.
- Tempel ER, Seiler TL, Aldrich EE. *Achieving Excellence in Fund Raising, 3rd ed.* San Francisco, CA: Jossey-Bass; 2011.



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Module 7 – Resources/Financial Management

Assignments/Activities Summary Checklist

Checklist

Section 1 – Resource Management

- ✓ Stop and Think: Sources of Revenue (slide 17)
- ✓ Stop and Think: Expense Classifications (slide 21)
- ✓ Research and Journaling Activity: Analyzing Fiscal Year Budgets (slide 22)
- ✓ Stop and Think: Planning and Budgeting (slide 29)
- ✓ Stop and Think: Monitoring the Budget (slide 34)
- ✓ Journaling Activity (slides 35-36)
- ✓ Case Study Assignment (slides 37-38)

Section 2 – Financial Statements

- ✓ Research Activity: Your Institutions Financial Statements (slide 14)
- ✓ Journaling Activity: Building an Income Statement (slide 21)
- ✓ Journaling Activity: Building a Balance Sheet (slide 25)
- ✓ Stop and Think: Impacting the Balance Sheet (slide 26)
- ✓ Stop and Think: Impacting Cash (slide 30)
- ✓ Journaling Activity: Building a Cash Statement (slides 31-33)
- ✓ Research Activity: The Annual Report (slide 34)
- ✓ Stop and Think: Budget Lunches (slide 35)

Section 3 – Tools for Assessing Financial Health

- ✓ Research Activity: Applying Ratios (slides 9-10)
- ✓ Research Activity: Working With Scores (slides 21-22)
- ✓ Stop and Think: Assessing Financial Health (slide 25)
- ✓ Research Activity: Analyzing the FIT Report (slides 31-32)
- ✓ Research Activity: CFI and Your Institution (slide 33)



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Section 4 – Endowment Management and Fund Raising

- ✓ Research Activity: Endowment Management at Your Institution (slides 19-20)
- ✓ Stop and Think: Your Use of Endowments (slide 29)
- ✓ Research Activity, Part 1: Explore Your Institution's Fundraising Efforts (slide 30)
- ✓ Research Activity, Part 2: Developing a Case Statement (slide 31)
- ✓ Research Activity: Your Program's Effectiveness (slide 36)
- ✓ Journaling Activity: Accreditation (slides 48-50)
- ✓ Journaling Activity: Case Study Questions (slide 51-54)
- ✓ Discussion Forum: Questions (slides 55-56)

Resources

The College Board. <http://trends.collegeboard.org/sites/default/files/trends-college-pricing-web-final-508-2.pdf>

Science Insider. <http://news.sciencemag.org/scienceinsider/2011/10/nih-grant-success-rate-likely.html>

The College Board. Federal funding for undergraduate and graduate students. <https://secure-media.collegeboard.org/digitalServices/misc/trends/2014-trends-student-aid-report-final.pdf>

Definitions of the function codes. <https://nces.ed.gov/pubs2006/ficm/content.asp?ContentType=Appendix&appendix=B>

Strategic Planning

Primer. http://www.learningace.com/doc/1600215/fd4614cb9b1350003c683a8a70b3fa77/strategic_planning_primer

NACUBO. http://www.nacubo.org/Membership_and_Community/Benefits_of_Membership.html



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Module 7 – Resources/Financial Management

NACUBO. Business Policy

Areas. [http://www.nacubo.org/Business and Policy Areas/Accounting/Advisory Reports/Advisory Report 98-1 Title IV Financial Responsibility Standards Revised.html](http://www.nacubo.org/Business_and_Policy_Areas/Accounting/Advisory_Reports/Advisory_Report_98-1_Title_IV_Financial_Responsibility_Standards_Revised.html)

[http://www.nacubo.org/Business and Policy Areas/Student Financial Services/Student Financial Services News/ED Releases Financial Responsibility Scores.html](http://www.nacubo.org/Business_and_Policy_Areas/Student_Financial_Services/Student_Financial_Services_News/ED_Releases_Financial_Responsibility_Scores.html).

Federal Student Aid Composite Scores. <http://studentaid.ed.gov/about/data-center/school/composite-scores>.

Composite Financial Index. [http://www.cic.edu/Research-and-Data/Benchmarking-Tools-and-Services/Documents/Sample College 2014 FIT.pdf](http://www.cic.edu/Research-and-Data/Benchmarking-Tools-and-Services/Documents/Sample_College_2014_FIT.pdf).

Council for Aid to Education. <http://cae.org/images/uploads/pdf/VSE-2014-Press-Release.pdf>

The Commission on Accreditation of Physical Therapy Education (CAPTE) Handbook; 2012. [http://www.capteonline.org/uploadedFiles/CAPTEorg/About CAPTE/Resources/Accreditation Handbook/EvaluativeCriteria PT.pdf](http://www.capteonline.org/uploadedFiles/CAPTEorg/About_CAPTE/Resources/Accreditation_Handbook/EvaluativeCriteria_PT.pdf)

National Institute of Health (NIH)
<http://grants.nih.gov/grants/oer.htm>



Module 8
Program Development and Assessment
Module Resources



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Module 8 – Program Development and Assessment

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Outcome Objectives

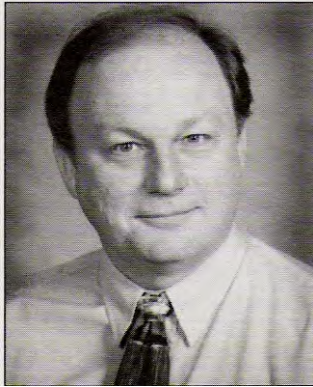
After completing this module, you should be able to:

1. Evaluate different models of curriculum design in the context of institutional and programmatic missions and realities.
2. Use an outcomes-based approach to curriculum design and assessment.
3. Develop a comprehensive outcomes-based program evaluation plan consistent with your program's and institution's vision and mission.
4. Design a comprehensive program evaluation process.
5. Evaluate the efficacy of your current program evaluation process.



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Faculty Biography



Robert Mundhenk, PhD

Past President - Association for the Assessment of Learning in Higher Education

Robert Mundhenk, PhD, is the past president of the Association for the Assessment of Learning in Higher Education (AALHE), housed at the University of Kentucky. He is also senior scholar at the Higher Learning Commission of the North Central Association of Colleges and Schools, the largest regional accrediting agency in the country, where he has designed and run the commission's programming on the assessment of learning and has just developed an Academy on Student Persistence and Completion. He served as director of assessment for the American Association for Higher Education after teaching English at Fordham University and Northampton Community College for more than 30 years. At the latter institution, he also served as academic vice president for 12 years. In that role, he oversaw a number of health programs and was responsible for their reaccreditation. He received his PhD in English from the University of California at Los Angeles. After providing this module this year, he will be heading off into a post-academic sunset.



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Faculty Virtual Office Hours – Module 8

- Monday, May 9, 2016: 2:00 – 4:00 pm ET (Adobe Webx Webinar)
- Saturday, May 14, 2016; 9:00 – 11:00 am ET (Discussion Forum LMS)
- Tuesday, May 24, 2016; 12:00 – 2:00 pm ET (Adobe Webx Webinar)

Readings

Required Texts

- Huba ME, Freed JE. *Learner-Centered Assessment on College Campuses: Shifting the Focus from Teaching to Learning*. Allyn and Bacon; 2000.
- Schechter EI. Association for the Assessment of Learning in Higher Education. 1995-2015. <http://www.assessmentcommons.org>

Section 1

- Huba ME, Freed JE. *Learner-Centered Assessment on College Campuses: Shifting the Focus from Teaching to Learning*. Allyn and Bacon; 2000: Chapters 1 and 2, 60-61.

Section 3

- Huba ME, Freed JE. *Learner-Centered Assessment on College Campuses: Shifting the Focus from Teaching to Learning*. Allyn and Bacon; 2000: 154-155, 160-182, Chapter 6.

Section 4

- Huba ME, Freed JE. *Learner-Centered Assessment on College Campuses: Shifting the Focus from Teaching to Learning*. Allyn and Bacon; 2000: 151.

Section 5

- Huba ME, Freed JE. *Learner-Centered Assessment on College Campuses: Shifting the Focus from Teaching to Learning*. Allyn and Bacon; 2000: 10, 71-72

Recommended Readings

Section 1

- Bloom's taxonomy. http://ww2.odu.edu/educ/roverbau/Bloom/blooms_taxonomy.htm
- Revised Bloom's taxonomy. http://www.utar.edu.my/fegt/file/Revised_Blooms_Info.pdf



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Section 3

- Maki P. *Assessing for Learning*. Sterling, VA: Stylus Publishing; 2004.
- Stevens DD, Levi AJ. *Introduction to Rubrics*. Sterling, VA: Stylus Publishing; 2005.
- Internet Resources for Higher Education Assessment, Descriptive Rubrics.
<http://www2.acs.ncsu.edu/upa/assmt/resource.htm>
- Association of American Colleges and Universities.
www.aacu.edu

Section 4

- Megan Oakleaf M, Belanger J, Graham C. Choosing and using assessment management systems: What librarians need to know. ACRL. Indianapolis, IN. April 10-13, 2013; 97-106.
http://www.ala.org/acrl/sites/ala.org.acrl/files/content/conferences/consandprecons/2013/papers/OakleafBelangerGraham_Choosing.pdf



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Assignments/Activities Summary Checklist

Checklist

Introduction and Overview

- ✓ Reflection Activity: Outcome-based Approach (slide 11)
- ✓ Journaling Activity: Time to Explore Resources (slide 13)

Section 1 – Outcome-based Thinking

- ✓ Stop and Think: Assessing Your Program’s Learning Paradigm (slide 7)
- ✓ Journaling Activity: Is Your Program Learning Centered? (slide 11)
- ✓ Stop and Think: Applying Bloom’s Taxonomy (slide 18)
- ✓ Stop and Think: Analyzing Outcomes in Your Program (slide 30)
- ✓ **Discussion Forum:** Evaluating an Instructional Claim (slide 31)

Section 2 – Outcome-based Program Design

- ✓ Stop and Think: Reviewing Your Program Development Policies (slide 6)
- ✓ Journaling Activity: Topic- or Outcome-based? (slide 10)
- ✓ Activity: Reviewing a Curriculum Map (slide 18)
- ✓ **Discussion Forum:** Analyzing the Sample Curriculum Map (slide 25)
- ✓ Stop and Think: A Final Reflection (slide 31)

Section 3 – Outcome-based Assessment

- ✓ Journaling Activity: Using Student Performance Data (slide 7)
- ✓ Stop and Think: Using Rubrics (slide 11)
- ✓ Stop and Think: Using Descriptive Rubrics to Improve Student Performance (slide 18)
- ✓ Stop and Think: Using Rubrics in the Real World (slide 25)
- ✓ **Discussion Forum:** Engaging Faculty in the Assessment Process (slide 26)
- ✓ Stop and Think: Implementing an Outcomes Assessment Approach (slide 31)
- ✓ **Discussion Forum:** Develop a Rubric (slide 32)



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Section 4 – Using Evidence From Outcome-based Assessment

- ✓ Stop and Think: Data Collection (slide 7)
- ✓ Journaling Activity: Are Your Data Useful? (slide 14)
- ✓ Stop and Think: Direct and Indirect Measures (slide 18)
- ✓ **Discussion Forum:** Direct and Indirect Measures (slide 27)

Section 5 – Using Outcome-based Assessment in Program Evaluation

- ✓ Stop and Think: Student Performance Data (slide 6)
- ✓ Stop and Think: Program Review Process (slide 15)
- ✓ Journaling Activity: Using Assessment Data (slide 19)
- ✓ **Discussion Forum:** Using Program Outcome Data for Program Evaluation and Review (slide 22)

GLOSSARY

CRAC: Consortium of Regional Accrediting Commissions

Formative assessments: Interim assessments, designed to provide students and faculty meaningful information about student learning in order to improve it. In a formative model, especially a developmental one, students at different levels are expected to perform with different kinds of proficiency, and the assessment instrument should provide meaningful indicators that hint toward strategies for improvement.

Outcome: The intended result of a learning experience (course, program, clinical experience, internship, etc), articulated in terms of *what a student can do with what he or she knows*.

Outcome-based Models: While coverage of topical information is important as well in these models, the development of core abilities that incorporate or use the knowledge developed in topical models tends to be more important. In this respect these programs tend to focus more on developmental processes than on coverage of material.

Rubric: “As applied to assessment of student work, a rubric reveals, if you will, the scoring ‘rules.’ It explains to students the criteria against which their work will be judged. More importantly for our purposes, it *makes public key criteria* that students can use in developing, revising, and judging



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their own work.” (Huba ME, Freed JE. *Learner-Centered Assessment on College Campuses: Shifting the Focus from Teaching to Learning*. Allyn and Bacon; 2000:155.)

Summative assessments: Designed to determine degree of achievement at the end of a designated cycle. They may be delimited by such things as cohort admission date, and their meaning may be determined in part by a comparison between inputs (what students could do when admitted) and outcomes (what they can do at graduation or course completion).

Topical Models: These models tend to focus on coverage of essential areas and topics, as well as on course sequencing and prerequisites that arrange the topics in a logical order. Even programs that include a significant amount of skill development tend to be structured topically.



Module 9
Relationships, Influence, and Partnerships
Module Resources



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Module 9 – Relationships, Influence, and Partnerships

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Outcome Objectives

After completing this module, you will be able to:

1. Compare your leadership characteristics with the characteristics of a change agent, identify change agent characteristics that you possess, and determine practical ways to acquire those you do not possess.
2. Identify potential contacts to establish a new physical therapy school within a given academic environment and examine the risk factors associated with this endeavor.
3. Apply the principles for creating a positive public image for your physical therapy school/program by creating a shared vision, using emotional intelligence, and applying a situational leadership approach.
4. Recall the definition and methods for “leading from the middle” and identify practical strategies for applying the technique in your environment.
5. Assess available technologies to determine their appropriateness for your academic environment in the areas of communication and relationship building.



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Faculty Biography



Deborah Waddill, EdD, MA-Educational Technology
President Restek Consulting

Dr. Deborah Waddill is President of Restek Consulting, LLC, a firm which provides consulting services on the strategic selection, design, and implementation of human and organizational learning services enabled by technology. Dr. Waddill is a published author on the topics of technology, leadership, and adult learning. In 2011, she co-authored a text entitled *The e-HR Advantage: The Complete Handbook for Technology-Enabled Human Resources* (Nicholas Brealey Publishing). This book serves as the text for two courses that she teaches for the Rutgers Mini-Masters program in the School of Management and Labor Relations.

Dr. Deborah Waddill is pleased to be an Adjunct Professor for The George Washington University's School of Medicine and Health Sciences and for GWU's Graduate School of Education and Human Development masters programs. She teaches online as well as blended and face-to-face courses at campuses in Hampton Roads Virginia, Singapore, Hong Kong and South Africa. Dr. Waddill speaks regularly at conferences and publishes in scholarly journals and textbooks on a variety of research topics related to technology, leadership, and human and organizational learning. She is a reviewer for the *Advances in Human Resource Development* and *Human Resource Development Review* journals.

In 2012, Dr. Waddill was inducted into the Alpha Eta Honor Society, which is committed to the promotion of scholarship, service and fellowship among health professionals and the recognition of leadership and high attainments in the health professions. Dr. Waddill earned her doctorate through the Executive Leadership Program at The George Washington University where her innovative dissertation, which involved putting the action learning leadership development method online, earned dissertation of the year award from the World Institute of Action Learning and the Phi Delta Kappa–GWU Chapter. Dr. Waddill



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graduated summa cum laude from The George Washington University with a Masters Degree in Educational Technology Leadership.

Prior to founding her own consulting business, Dr. Waddill held a management position in a performance improvement technical training firm. Throughout her business career Dr. Waddill has managed and led large-scale, technical instructional design projects for clients including the NIH, National Agricultural Statistical Services (NASS), the US Department of Agriculture, AT&T, and the Federal Deposit Insurance Corporation (FDIC).

Phone: 703-244-9662

E-mail: dwaddill@email.gwu.edu

Faculty Biography - Podcast



Joseph Bocchino, EdD, MBA
Interim Senior Associate Dean for Health Sciences

Joseph (Joe) Bocchino, EdD, MBA, has served as an executive within the pharmaceutical, health care, and hospitality industries and has held board positions within the private and public sectors. His corporate experiences have included hospital assignments; assignments in both the US domestic markets and global markets; responsibilities in pharmaceutical clinical research, manufacturing and marketing environments; medical device development and manufacturing; and oversight responsibilities for regulatory affairs and product registrations. He has extensive merger and acquisition experience in the evaluation and integration stages, focusing on the valuation and retention of human leadership capital during corporate transactions.

Bocchino teaches in the [School](#) of Medicine and Health Sciences and in the Graduate School of Education and Human Development. He continues to conduct research and to write, presenting his work in international academic forums. His expertise is extensive across the health services in the areas of clinical health sciences, clinical management and leadership, clinical research administration, clinical and translational research, emergency health services, health care quality, and regulatory affairs. He teaches in the Department of [Clinical Research and Leadership](#) at The George Washington University.

Bocchino earned his Bachelor of Science degree at Florida International University, MBA at Xavier University, and doctorate in [education](#) at The George Washington University.

Phone: 202/994-5129

E-mail: bocchino@gwu.edu

Faculty Virtual Office Hours – Module 9

- Thursday, June 16, 2016; 8:00 – 10:00 pm ET
- Monday, June 20, 2016; 8:00 – 10:00 AM ET
- Wednesday, June 22, 2016; 7:00 – 9:00 pm ET (Adobe Webinar Session)

Readings

Required Readings

Required Texts

- Porter-O'Grady T, Malloch K. *Quantum Leadership: Advancing Innovation, Transforming Health Care*, 3rd ed. Sudbury, MA: Jones and Bartlett Learning LLC; 2011.
- Waddill D, Marquardt M. *The e-HR Advantage: The Complete Handbook for Technology-Enabled Human Resources*. Boston, MA: Nicholas Brealey; 2011.

Section 1

- Kanter RM. The enduring skills of change leaders. *Leader to Leader*. Frances Hesselbein Leadership Institute; summer 1999 (13).
http://web.sau.edu/RichardsRandyL/Leadership_Readings_The%20Enduring%20Skills%20of%20Change%20Leaders.htm.
- Kaufman B. The leader as change agent. *University Business Magazine*; March 2005.
<http://www.roiconsultinggroup.com/uploads/1/2/7/5/12755006/universitybusinessleaderaschangeagent.pdf>
- Porter-O'Grady T, Malloch K. *Quantum Leadership: Advancing Innovation, Transforming Health Care*, 3rd ed. Sudbury, MA: Jones and Bartlett Learning LLC; 2011:1-37 (Chapter one); 41-75 (Chapter 2).

Section 2

- Rooke D, Torbert WR. Seven Transformations of Leadership. *Harvard Business Review*. April 2005:67-76.
<http://aliainstitute.org/wp-content/uploads/2012/12/seven-transformations-of-leadership.pdf>
- Porter-O'Grady T, Malloch K. Chapter Eight: Living leadership: vulnerability, risk taking, and stretching. *Quantum Leadership: Advancing Innovation, Transforming Health Care*. 3rd ed. Sudbury, MA: Jones and Bartlett Learning LLC; 2011:249-284.

Section 3

- Strategic Situational Leadership. <http://www.jackbkeenan.com/programs/leadership-management/strategic-situational-leadership/>



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- Smith MK. (2001) 'The learning organization', the encyclopedia of informal education; 2001. <http://www.infed.org/biblio/learning-organization.htm>
- Porter-O'Grady T, Malloch K. Chapter Ten: emotional competence: a vital leadership skill. *Quantum Leadership: Advancing Innovation, Transforming Health Care*. 3rd ed. Sudbury, MA. Jones and Bartlett Learning LLC; 2011:321-356.

Section 4

- Adams R. Authentic Leadership: The six characteristics of an authentic leader. Ezine@rticles. 2012. <http://ezinearticles.com/?Authentic-Leadership:-The-Six-Characteristics-of-an-Authentic-Leader&id=6340763>
- Porter-O'Grady T, Malloch K. Chapter 8: living leadership: vulnerability, risk taking, and stretching. *Quantum Leadership: Advancing Innovation, Transforming Health Care*. 3rd ed. Sudbury, MA: Jones and Bartlett Learning LLC; 2011:249-284.
- Margaret Heffernan's Ted Talk entitled Super Chicken (Resources PDF and link) http://www.ted.com/talks/margaret_heffernan_why_it_s_time_to_forget_the_pecking_order_at_work

Section 5

- Waddill D, Marquardt M. *The e-HR Advantage: The Complete Handbook for Technology-Enabled Human Resources*. Boston, MA. Nicholas Brealey; 2011: Chapters 11, 12, 14, 17.
- Technology in education. *Education Week* website. September 1, 2011. <http://www.edweek.org/ew/issues/technology-in-education/>.
- Netiquette PowerPoint (Resources power point)

Recommended Readings

Section 2

- Bolman L, Deal T. *Reframing Organizations: Artistry, Choice and Leadership*. San Francisco, CA: Jossey-Bass; 2008.
- Covey SR. *The 7 Habits of Highly Effective People*. New York, NY: Simon & Schuster; 1989.
- Kouzes JM, Posner BZ. *The Leadership Challenge*. 4th ed. San Francisco, CA: Jossey-Bass; 2007.
- RoAne S. *How to Work a Room*. Rev ed. Harper Collins Publisher; 2007.



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Section 3

- Hersey P, Blanchard K. *The Management of Organizational Behavior*. Englewood Cliffs, NJ: Prentice Hall; 1977.
- Northouse P. *Leadership Theory and Practice*, Fifth Edition. Chapter 5: situational approach. Thousand Oaks, CA: Sage; 2010:89-110.
- Senge PM. *The Fifth Discipline*. New York, NY: Doubleday/Currency; 1990.
- Senge PM, Kleiner A, Roberts C, Ross RB, Smith BJ. *The Fifth Discipline Fieldbook: Strategies and Tools for Building a Learning Organization*. New York, NY: Doubleday; 1994.
- Weick KE. *Sensemaking in Organizations*. Thousand Oaks, CA: Sage Publishing; 1995.

Section 4

- Bloom BX. (Ed). *Taxonomy of Educational Objectives: The Classification of Educational Goals: Handbook I, Cognitive Domain*. New York, NY: Longmans, Green; 1956.
- Brown JA, Gardner WL. Effective modeling of authentic leadership. *Academic Exchange Quarterly*; 2007.
- Marquardt, M. *Leading with Questions*. San Francisco, CA: Jossey Bass; 2005:63-95 (Chapter 4 – Asking the right questions, Chapter 5 – The art of asking questions).
- Northouse P. *Leadership: Theory and Practice*, Fifth edition. Los Angeles, CA: Sage Publishing; 2010: 205-240 (Chapter 10 – Authentic Leadership).
- Yukl G. *Leadership in Organizations*. Upper Saddle River, NJ: Prentice Hall; 2010.

Section 5

- Dashboards for Higher Education:
http://www.idashboards.com/Solutions/For-Your-Industry/Education/Higher-Education.aspx?qclid=CL_C3_PKsLwCFeJj7AodkWYAZQ
- Fauske J, Wade S. Research to practice online: Conditions that foster democracy, community, and critical thinking in computer-mediated discussions. *Journal of Research on Technology in Education*. 2004;36(2):137-153.
- Spinks N, Wells B, et al. Netiquette: A behavioral guide to electronic business communication. *Corporate Communications: An International Journal*. 1999;4(3):145.
- Stoddard H, Schonfeld T. A comparison of student performance between two instructional delivery methods for a healthcare ethics course. *Cambridge Quarterly of Healthcare Ethics*. 2001;20:493-501.



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Definitions

Authentic leadership. By definition, authentic leaders have high self-awareness about their values, emotions, self-identities, and abilities, and their actions reflect their values. They know who they are and what they believe. Authentic leaders are motivated by a desire for self-improvement, are not defensive, and are open to learning from feedback.

Blog. Short for “weblog,” the equivalent of an online journal.

Bloom’s Taxonomy. This hierarchy of thinking skills was developed by Bloom et al in 1956. It has 6 levels, which are (from the bottom up) knowledge, comprehension, application, analysis, synthesis, and evaluation.

Change agents. In the realm of health care education, those who take the risk to embrace a bold vision that challenges the status quo of cherished assumptions regarding mission, academic programs, fundraising strategies, and community relations.

Chats. Provide for synchronous [real time] online communication between 2 or occasionally more users.

Complex systems. A system composed of interconnected parts that as a whole exhibits one or more properties not obvious from the properties of the individual parts. Complex systems are composed of simple systems that must be able to act independently.

E-Learning. Any type of learning situation in which instructional context is delivered through the use of computer-networked technology.

Emotional Competence. The adequacy with which you address situations. Emotional competence is obtained incrementally ^(1, p 343); thus, you may go through a few stages until you are considered an expert at emotional competence. You can assess your own competence by examining the 5 levels portrayed in the work of Porter-O’Grady and Malloch. ^(pp343-344)

Emotional Intelligence (EI). Term that is applicable at the individual level; it pertains to what is inside of, or internal to, the individual; thus, how you face a situation is indicative of whether or not you have emotional intelligence. Emotional intelligence “determines our potential for learning the practical skills of emotional competence.”^(1, p 335) According to the authors, the 5 elements of emotional intelligence are self-awareness, self-regulation, motivation, empathy, and social skill.

Frame or Framework. This is the equivalent of a mental model or set of ideas and assumptions.

“Leading from the middle.” Those who “lead from the middle” will sometimes be out in front, and other times they will follow. It is best suited to leaders who are not seeking the limelight, but who are also true to themselves, have a vision for where the organization should go, and are willing to



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collaborate with others in order to meet that goal. People who lead from the middle typically are authentic leaders.

Learning Content Management System (LCMS). A management system that can be used to develop, maintain, use, store, and deliver e-learning courseware.

Listserv. An electronic mailing list that allows an individual to send a single e-mail to a list of persons, and then concurrently distribute it to all of the addresses of the subscribers to the list.

Networking. Ability to identify and pursue relevant relationships (ie, figure out which players you need to influence and who needs to be part of the process).

Podcasting or Vodcasting. Audio or video files distributed via the Internet to a computer or mobile device (such as an iPod).

Portal. An online website that can be customized to the user and provides access to other related content.

Shared vision. According to Senge,² shared vision depends upon intrinsic motivators coinciding with personal vision of the individuals and this union creates the greatest long lasting and effective shared vision. These intrinsic motivators uplift individual aspirations and “create the spark that lifts organizations out of the ordinary drab existence.”

Situational leadership. Leadership approach in which the leader adjusts to the development levels of the follower.

Stilling the mind. Stilling, not emptying, the mind entails dismissing, temporarily, mental models for just enough time to put aside perceptions of power, money, gender, culture, physical appearance, and so on, as a way to be a better listener.

Social networking. An online way to connect with people of similar interests through media such as Facebook and LinkedIn.

SWOT Analysis. Stands for an analysis of strengths, weaknesses, opportunities, and threats. It is a business method commonly used to analyze and mitigate risk.

Systems thinking. Approach to thinking broadly that includes several facets:

- living in the potential not the actual,
- looking at the whole instead of the part,
- realizing nonetheless that the part impacts the whole,
- believing that error is essential to creation,
- capitalizing on inter-connectedness,
- acknowledging that simple systems make up complex systems, and
- accepting diversity as essential.



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Threaded Discussion. Asynchronous, online discussion postings that are related to a specific topic for which the instructor or students can post a message or respond to a message at any time and from any location.

Twitter. Internet system used to communicate using short text messages called “tweets.”

Virtual Worlds. Three dimensional in appearance, these worlds are entered using an avatar or computer-generated being.

Vulnerability principle. Leaders must be able to demonstrate the following to be vulnerable:

- Examine long-held beliefs and change their minds without feelings of inadequacy.
- Recognize personal limitations and strengths.
- Work from a clearly defined personal identity.^(1, p 251)

Web-conferencing. An online service (such as Adobe Connect and GoToMeeting[®]) that enables a presenter to deliver a presentation over the web to a group of geographically dispersed participants.

Wikis. Websites or online services that allow users to add and edit content collectively and with comments that are color coded to the different individual reviewers.



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Assignments/Activities Summary Checklist

Checklist

Introduction and Overview

- ✓ Pre-course Assignment: Find an Institution (slide 16)

Section 1 – Being a Change Agent

- ✓ Stop and Listen: An Interview With Joe Bocchino, EdD, MBA [Audio File 1-1 to 1-3.mp3; 1-4 to 1-5.mp3] (slide 4)
- ✓ Journal Activity: Review Your Profile (slide 8)
- ✓ *Discussion Forum Activity: Share Your Questions and Insights (slide 12)*
- ✓ Activity: Assessing The George Washington University Vision Statement (slide 15)
- ✓ Take Action: Start Your Strategic Plan (slide 16)

Section 2 – Changing Risks to Opportunities

- ✓ Stop and Listen: An Interview With Joe Bocchino, EdD, MBA [Audio File 2-1 and 2-2] (slide 4)
- ✓ Stop and Think: Approaches to Risk (slide 8)
- ✓ *Discussion Forum Activity: Dealing with Risk (slide 15)*
- ✓ Strategic Plan Activity: Record Contacts (slide 27)
- ✓ Strategic Plan Activity: Research and Develop External Contacts (slide 28)

Section 3 – Enhancing Visibility

- ✓ Stop and Listen: Multiple Interviews [Audio File 3-1 to 3-3; 4-1 and 4-2] (slide 4)
- ✓ Stop and Listen: Emotional Intelligence Vodcast [link provided] (slide 4)
- ✓ Stop and Think: Applying the Readings and Interviews (slide 5)
- ✓ Stop, Think, and Journal: Trends Revisited (slides 18-19)



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- ✓ Journaling Activity: Creating a Public Image (slide 21)

Section 4 – Leading From the Middle

- ✓ Stop and Listen: An Interview With Joe Bocchino, EdD, MBA [Audio File 5-1 and 5-2] (slide 4)
- ✓ Stop and Think: Leading From the Middle (slide 5)
- ✓ Research Activity: Constructing and Employing Interview Questions (slide 19)
- ✓ *Discussion Forum Activity: Interview Debriefs (slide 20)*

Section 5 – Using Technology Effectively

- ✓ Stop and Listen: An Interview With Joe Bocchino, EdD, MBA [Audio File 6-1 and 6-2](slide 4)
- ✓ *Discussion Forum Activity: Experience and Observation of Technology Uses (slide 11)*
- ✓ Stop and Think: Applying Technology (slide 22)
- ✓ Take Action: Technology and Your Strategic Plan (slide 23)

Section 6 – Summary and Conclusion

- ✓ Stop and Listen: Joe Bocchino’s Closing Comments [Audio File 7-1 and 7-2] (slide 2)

Resources

- Audio Files 1-1 to 1-3, 1-4 to 1-5, 2-1 to 2-2, 3-1 to 3-3, 4-1 to 4-2, 5-1 to 5-2, 6-1 to 6-2, 7-1 to 7-2.
- Goleman Interview Vodcast link on Emotional Intelligence
[http://atrium.haygroup.com/us/video/video_popup.aspx?id=1What is Emotional Intelligence 480x360.flv&sc=y](http://atrium.haygroup.com/us/video/video_popup.aspx?id=1What%20is%20Emotional%20Intelligence%20480x360.flv&sc=y)



Education Leadership Institute Mentorship Guide

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Purpose of Mentorship for the Educational Leadership Institute Fellowship

Mentorship is an integral part of the Education Leadership Institute Fellowship experience. It serves to link the individual fellows-in-training in order to share experiences and ideas. Mentorship also gives each fellow-in-training access to a 2-person mentoring team of experienced academic physical therapy leaders whose responsibility it is to challenge, coach, and reflect with fellows-in-training on presentations, readings and small group discussions between and during the onsite meetings. Fellows-in-training connect with one another as they read, reflect, and discuss leadership topics between onsite sessions using an on-line interactive format. It is the role of the mentor to facilitate this interactive learning experience for the fellows-in-training during the course of the Fellowship. The mentorship group will also meet with mentors during the onsite meetings to engage in small-group, face-to-face discussions and problem solving. ELI graduates develop professional peer groups well after the conclusion of the Fellowship experience.

Specifically, the objectives of the mentorship experience are to:

- Provide a small group forum for guided discussion, reflection, and informal interaction around the learning experiences of the Fellowship.
- Establish a cohort of novice leaders who can be leadership resources for one another and others in the future.
- Provide each small group with access to a mentor who demonstrates effective academic leadership to serve as a guide, coach, and facilitator to the group.
- Develop future mentors for the Education Leadership institute through effective mentorship role modeling.

Goals of the Mentoring Relationship

The mentor is a critical component of the Education Leadership Institute Fellowship experience. While leadership principles, values, and practices can be explored, the presence of a leadership role model and coach is important to the learning experience of these fellows-in-training as emerging academic leaders. To that end, the mentor serves as the cohort facilitator and guide, as well as a resource for leadership experience and an example of successful academic leadership. The mentor's task is not so much to direct or teach the mentorship group, but to serve as a model and facilitator of the learning process during the Fellowship experience. As with any mentoring relationship, success is based on the engagement and interest of both the mentor and the fellow-in-training. The mentor, however, must be prepared to promote this mentoring relationship by providing support, sharing experiences, and challenging the thinking of each fellow-in-training.

Specifically, the mentoring relationship will:

- Provide a role model in academic leadership for novice academic administrators.
- Provide a role model in effective mentoring techniques as they may be used by academic leaders with their faculties.
- Provide for each novice academic administrator an individual professional resource who can serve as coach, sounding board, and guide.

Mentor Position Description

Overview

Mentors are an essential component throughout the entire program of the ELI Fellowship to provide guidance to fellows-in-training in a focused learner-centered program. They are full participants in the onsite and online aspects of the program and have access to all materials. These individuals provide regular, timely, and close interaction with the fellows-in-training through coaching, advising, and thought-provoking questions on an individual level, as well as through their assigned small group during the Institute. Collectively, mentors represent diverse institutional settings including public/private and Carnegie classifications, as well as physical therapist and physical therapist assistant academic programs.

Qualifications

Ideal characteristics of the mentors are that they are senior physical therapists or physical therapist assistants who are active or recently retired faculty with significant experience and success as program directors or leaders in physical therapy education, APTA members who satisfy the Commission on Accreditation in Physical Therapy Education (CAPTE) criteria for program administrators, and possess the following attributes:

- Exhibit strong interpersonal and communication skills, including listening, negotiating, conflict resolution, and facilitating creative thinking in others.
- Think strategically and analytically and be able to apply data in decision making
- Show active and effective networking and ability to identify and forge new relationships to promote physical therapy higher education programs.
- Embody a positive and optimistic view regarding the role of an academic administrator and the future of physical therapist and physical therapist assistant education programs.
- Demonstrate balance in personal and professional roles and responsibilities and foster this in others.
- Empower others via active listening and facilitate discussions effectively to elicit shared decision-making.
- Foster application of learning theory, principles, and emerging concepts in higher education to their home institution.
- Articulate a clear view of the role of the consumers/recipients of physical therapy education, including the students and other stakeholders.
- Be observant of change in the environment and able to impart a vision of “future” to faculty.
- Understand organizational change in both the macro and micro environment and manifest the ability to respond positively.
- Understand emerging demands on physical therapists and physical therapist assistants in the 21st century.
- Demonstrate patience with learners who struggle to understand and adapt to new organizational challenges.
- Show skill in creating fiscal approaches to meet changing program demands.
- Demonstrate a value for understanding broad issues in health care that do or may affect the preparation of physical therapists and physical therapist assistants.
- Be open to learning about and facilitating the use of new ideas and approaches with fellows-in-training.
- Demonstrate humility and integrity and a genuine interest in learning from others

Program Requirements

Mentors commit to full participation in the program including all onsite and online sessions.

- Facilitate 3 onsite sessions through probing questions, reflective thinking, and problem solving.
- Serve as consultants to fellows-in-training.
- Meet with other program leaders for planning purposes.
- Be available via the mentorship online community on the APTA Hub between 3 onsite sessions to address issues, promote reflection, and apply principles.
- Conduct conference calls or webinars with cohort at least once per month between onsite sessions.
- Serve as a resource for the fellow-in-training leadership projects.
- Participate in the ongoing assessment of the fellows-in-training, program, and mentors.
- In pairs remain with same cohort of fellows-in-training throughout the program.

Format of Mentorship

Mentors work in pairs with a small group of approximately 5-6 novice academic leaders. The same mentors work with the cohort of 5-6 fellows-in-training throughout the year of the Fellowship. The mentors participate in each of the onsite sessions throughout the year and are familiar with the content of the Fellowship's curriculum. Between onsite sessions, mentors facilitate group communication on the discussion board using guiding questions and reflections on the reading associated with each module. Mentors also serve as resources in the development of each fellow-in-training's Leadership Project, which are presented at the end of the year at the alumni event in October. Mentors should encourage interaction among the small group of novice academic leaders, not just with mentors, to optimize strengths of each member in the group.

Activities/Timetable

- WELCOME: Mentors participate in the ELI program welcome and orientation Webinar to new fellows-in-training in July.
- FACILITATE: Modules 1-3. Facilitate participant activities/pose questions/facilitate discussion board communication. (Modules 1-3 occur prior to the first onsite meeting in October.) Facilitation occurs during agreed upon times for subgroups based on their preferred methods for communicating between the orientation and the first onsite session.
- ONSITE MEETING: Attend first meeting of the Fellowship that occurs prior to the Education Leadership Conference (ELC) in October and serve as small-group facilitators.
- ASSESSMENT: Formative mentorship assessment designed to enhance mentorship experience throughout the remainder of the Fellowship.
- FACILITATE: Modules 4-6. Facilitate participant activities/pose questions/facilitate discussion board communication. (Modules 4-6 occur after the first onsite session and prior to the second onsite meeting in March.) Facilitation occurs with agreed upon times to convene the subgroups based on their preferred methods for communicating between the first and second onsite session.
- ONSITE MEETING: Attend second onsite session that occurs in March and serve as small-group facilitators during this meeting.
- FACILITATE: Modules 7-9. Facilitate participant activities/pose questions/facilitate discussion board communication. (Modules 7-9 occur after the second onsite session and prior to the third onsite meeting in July.) Facilitation occurs during agreed upon times for subgroups based on

their preferred methods for communicating between the orientation and the first onsite session.

- **ONSITE MEETING:** Attend third onsite meeting of the Fellowship that occurs in July and serve as small-group facilitators during this meeting.
- **ASSESSMENT:** Summative Mentorship Assessment to provide feedback to mentors and fellows-in-training.
- During the year, mentors serve as a resource to each novice academic leader as they develop their Leadership Project and prepare for a year-end presentation.

Mentorship Assessment

The goals of mentorship assessment are to 1) improve the mentorship experience and 2) maximize the learning of each fellow-in-training. The focus of mentorship assessment is on the process of mentorship, rather than the specific individual participant or mentor, although the effectiveness of each is included. Mentorship assessment does not address the content of the Education Leadership Institute Fellowship. The content review occurs via other assessment activities. Mentorship assessment seeks, however, to assess the effectiveness of the small group process, the role modeling and facilitation role of the mentor, and the engagement and contribution of each fellow-in-training.

Mentorship assessment occurs three times throughout the Fellowship. The first assessment occurs following Modules 1-3 and the first onsite session in October. The second mentorship assessment occurs after the second onsite session, and the third mentorship assessment takes place in July following the third and final onsite session. The purpose of the first assessment is to effect changes in the mentorship process and the purpose of the second and third assessment is to provide feedback to mentors and fellows-in-training.

Assessment components includes both a self-assessment completed by each mentor and each fellow-in-training, and a peer assessment. The peer assessment completed by fellows-in-training is limited to 2 peer participants and both mentors. The mentors as a team provide feedback to each of the fellows-in-training and to one another. It is the responsibility of each person (mentor and fellow-in-training) to receive the assessment data and to develop a plan to enhance their contribution to the mentorship process. The content of mentorship assessment includes the following performance areas (adapted from the University of Massachusetts at Amherst, Office of Faculty Development, and Mutual Mentoring Guide):

1. Shares his or her knowledge and experience.
2. Listens actively and nonjudgmentally.
3. Asks questions and makes suggestions that promote reflection.
4. Gives and seeks thoughtful, candid, and constructive feedback.
5. Provides support and encouragement.
6. Is regularly accessible.
7. Acts as an advocate for others in the mentorship relationship.

The formal assessment rates each person and offer comments in each content area of assessment. Mentors are responsible for facilitating the completion of self and peer assessments. Staff facilitates the exchange of these assessments with the mentorship group. Fellows-in-training and mentors are responsible for reviewing their assessment information and developing a plan to enhance their contribution to the mentorship process.

Resources for Effective Mentoring Techniques

There is a substantial body of literature on mentorship, addressing different mentoring recipients, mentorship techniques, strategies, and outcomes. The following specific mentorship readings are considered suggested reading for mentors in the Educational Leadership Institute. Please consider these carefully. They may be of use to mentors as they refine their role as mentor within the Education Leadership Institute Fellowship. Although all of the references and websites listed are excellent resources; those noted with an asterisk (*) are recommended for review.

References

1. Cox MD. Introduction to faculty learning communities. *New Directions for Teaching and Learning*. 2004; 97(Spring), 5-23. Available at: <http://onlinelibrary.wiley.com/doi/10.1002/tl.129/abstract>

This article describes the nature of faculty learning communities (group mentoring), existing programs at a variety of institutions, and characteristics necessary for successful mentoring.

2. Phillips-Jones L. *Skills for Successful Mentoring: Competencies of Outstanding Mentors and Mentees*. Grass Valley, CA: CCC/The Mentoring Group; 2003.* Available at: <http://www.mentoringgroup.com/html/products.html>

This booklet describes the skills necessary to manage effective mentoring partnerships. For purchase only. APTA will provide you with a copy of this booklet.

3. Sorcinelli MD, Yun JH. From mentor to mentoring networks: mentoring in the new academy. *Change*. 2007; 39 (November/December):58-61.* <http://www.changemag.org/Archives/Back%20Issues/November-December%202007/index.html>

This article highlights faculty development resources on mentoring published since 2000. The article is organized into 4 topics: 1) new conceptualizations of mentoring, 2) recent studies on mentoring, 3) faculty-development programs and practices that promote mentoring, and 4) gender, race, and other diversity issues related to mentoring.

4. Sorcinelli MD, Yun JH. Finding a Mentor. Thriving in Academe. *National Education Association*. 2009; 26(5): 5-8. Available at: <http://www.umass.edu/ofd/mentoring/resources.html>.

This reference describes a “Mutual Mentoring” approach that creates a network of mentors for a variety of needs and participants and includes a description of best practices in mentoring relationships.

5. Trower CA. Toward a greater understanding of the tenure track for minorities. *Change*. 2009; September/October:38-45. Available at: <http://www.changemag.org/Archives/Back%20Issues/September-October%202009/abstract-a-greater-understanding.html>

This article presents the unique considerations of junior faculty of color and how to address these issues in their career development.

6. Ilen TD, Eby LT. Factors related to mentor reports of mentoring functions provided: gender and relational characteristics. *Sex Roles*. 2004; 50(1):129-139. Available at: <https://springerlink3.metapress.com/content/n974321405102371/resource-secured/?target=fulltext.pdf&sid=ksevgj55xnvf4553po2jl55&sh=www.springerlink.com>
7. Bellini LA, Anderson DM. The benefits of formal mentoring for practitioners in therapeutic recreation. *Therapeutic Recreation Journal*. 2003;37:240-255. Available at: <http://www.highbeam.com/doc/1P3-500808871.html>

Web sites

1. American Council on Education
[www.acenet.edu/resources/chairs/?CFID=11240378&CFTOKEN=92150461&jsessionid=16308aa81b5c5F4FX\\$C9](http://www.acenet.edu/resources/chairs/?CFID=11240378&CFTOKEN=92150461&jsessionid=16308aa81b5c5F4FX$C9).
 This component of the Web site provides excellent resources for department chairs, including the document titled, "Words of Advice from Department Chairs and Deans." This document contains suggestions made by chairs that have enrolled in American Council on Education workshops for department/division chairs since November 1999. Their comments are divided into the following categories: 1) chairs appointed from within an institution, 2) chairs appointed from outside the institution, and 3) deans. This document also includes comments from a variety of institution types.
2. Harvard University, Development and Mentoring
www.faculty.harvard.edu/development-and-mentoring/faculty-mentoring-resources/department-chair-resources
 This Web site includes practical resources for department chairs in the areas of mentoring, department climate, and faculty retention.
3. University of Massachusetts at Amherst, Office of Faculty Development*
www.umass.edu/ofd/mentoring/resources.html
 This Web site provides a list and description of mentoring resources. This resource includes a Mutual Mentoring Guide that describes "the state of mentoring in academia; explains the benefits of the Mutual Mentoring model; provides suggestions for protégés, mentors, and department chairs; and describes sample mentoring projects." A helpful Guideline for Mentors also is included.



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ONSITE SESSION #1

September 30 – October 1, 2015

The Hyatt Regency Hotel, Baltimore, MD



Session Agenda - Mentor Version

Wednesday, September 30, 2015

7:15 AM Breakfast: Wake Up!

8:00 AM **Welcome Introductions** (Hyatt - Chesapeake B) Jody Frost, PT, DPT, PhD, FNAP

- Reminders: covenant, complete mentorship hours tracking form weekly throughout the year
- Overview

Notes:

- *Reiterate that in the course of real-life discussions the information shared remains confidential and within the confine of ELI. Expectations include active participation and completion of all ELI assessments throughout the year.*

8:15 AM **Exploring Leadership Styles** David Lake, PT, PhD

Notes:

- *Ice Breaker*
 - *Using photos (people, animals, landscape) select one that most resonates with your leadership style. Discuss why you selected that photo?*
- *Leadership style discussion*
 - *What did you discover about your leadership styles and what did you learn about yourself?*
 - *What is your current leadership style, general strengths, and area for further development?*
 - *How might you go about working on both of these during ELI and at your institution?*
 - *How does your type of institution and work environment relate to your photo?*

9:15 AM **Keynote Presentation** Stephanie P Kelly, PT, PhD
Associate Professor and Dean of the College of Health Sciences
Krannert School of Physical Therapy
So You Want to Be A Superhero?

9:45 AM **Keynote Presentation Q & A**

10:00 AM Break

10:15 AM **Discussion of Keynote Presentation and Leadership Styles** Mentorship Subgroups

- What was your leadership style picture? Why this photo?
- What photo did you select as a mentor? What is your leadership style preference(s)? In what type of institution do you provide leadership?
- Discuss the impact of the Keynote and your leadership styles exploration.

Notes:

- *Discussion provides an opportunity to share perspectives and feedback on the leadership exercises and keynote presentation.*



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11:00 AM	<p>Discussion of Module Content</p> <ul style="list-style-type: none"> • What were your “Aha” moments as related to the content for Modules 1-3? • Were there any concepts with which you disagreed? Were unclear? • What would you like to learn more about from the faculty? 	Mentorship Subgroups
12:00 PM	Lunch	
1:00 pm	<p>Webinar Discussion with ELI Faculty Panel</p> <ul style="list-style-type: none"> • Module 1: Personal Leadership and Management • Module 2: Higher Education, Health Care Systems, and Society • Module 3: Institutional Leadership and Management <p><i>Notes:</i></p> <ul style="list-style-type: none"> ▪ Purpose of the session is to integrate concepts learned from Modules 1, 2, and 3 through Q & A ▪ Participants submit questions in advance (due 9/25/15) that are collated by module; Share questions with faculty, mentors, and Fellows-in-training in advance of the session Webinar. ▪ Fellows-in-training pose questions directly of faculty on camera ▪ Record webinar session on Adobe Connect for retrieval post session. 	<p>Jody Frost – Moderator Lynn Gangone, EdD Charlotte Royeen, PhD, OT, FAOTA Nancy Hall, PhD</p>
3:00 pm	Break	
3:15 PM	<p>Leadership Application and Integration Activities</p> <ul style="list-style-type: none"> • Discussion and Analysis of Leadership Case Vignette – Part I • Discussion and Analysis of Leadership Case Vignette – Part II <p><i>Notes:</i></p> <ul style="list-style-type: none"> ▪ Mentors ask probing questions to assist learners in answering questions associated with the case vignette (Parts I and II) without providing answers. ▪ Goal is for the learners to learn how to solve their problems and to learn how to ask key questions of themselves. ▪ <u>Around 3:50 PM move to case vignette Part II.</u> 	Mentorship Groups
4:30 PM	<p>Discussion of Leadership Case Vignette (Plenary Discussion)</p> <ul style="list-style-type: none"> • Insights, reflections, challenges, and more! <p><i>Notes:</i></p> <ul style="list-style-type: none"> ▪ Summarize small group discussions and provoke deeper level questioning. ▪ Large group debriefing asking higher level questions about the case and probing for relational questions that broaden participants’ thinking. ▪ Add other variables to the situation and considerations at multiple realms (individual, department, organizational, community). 	Mentors/Fellows-in-Training (Mentors lead discussion)



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5:00 PM **Introduction: Using the Mentorship Assessment** Michael Emery, PT, EdD, FAPTA

- Identify peer to complete mentorship assessment throughout ELI.

Notes:

- Explain how to use the mentorship assessment and when this should be completed over the next 2 days.
- Participants bring 4 single-sided printed assessment copies (self-assess, assess each mentor and select one peer to assess throughout the year)
- Identify peer in the subgroup to be evaluated throughout the year.
- APTA will provide copies for the mentors to assess participants as a team!

5:15 PM **What a difference a day makes!** Jody Frost

- Personal “Aha” Moments
- Complete Mentorship Assessments (self, peer, and mentors)
- Prepare to discuss your real life leadership situations, Leadership Reflections, and Leadership Project possibilities.

5:30 PM Adjourn

6:30 PM **Dinner with Mentors and Fellows-in-Training**

B&O American Brasserie within the Hotel Monaco, 2 North Charles Street, Baltimore, MD 21201
<http://www.monaco-baltimore.com/restaurant/bo-brasserie.html>

Thursday, October 1, 2015

7:30 AM Continental Breakfast (Hyatt – Chesapeake B)

Notes:

- Mentor teams can use time to discuss their team-based mentorship assessments of the fellows-in-training during breakfast.

8:15 AM **Welcome Back** Jody Frost

- How is it going? Open Feedback Session

8:30 AM **Discussion and Refinement of Leadership Projects** Mentorship Groups

- Use the Leadership Project Template

Notes:

- Fellows-in-training will receive copies of the past 2-3 year summaries of Leadership projects from previous ELI Fellows
- Mentors review and discuss the leadership project outline to see if there are questions
 - Clarify that the **description** of the leadership project should be completed by the end of ELI however, the **actual project** may or may not be completed by the end of ELI.
 - Purpose of the leadership project is to integrate concepts learned throughout ELI and to give back to their academic institution. What content that you learned in Modules 1, 2, and 3 contributes to your Leadership Project?
 - Clarify that for the Leadership Project participants should consult with their Dean/Supervisor about the project prior to arrival and



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throughout the institute.

- Mentors consult on leadership projects related to an institutional/program problem that the participant is trying to solve.
 - Mentors pose questions of participants how they plan to get through the leadership project?
 - Consider resources within ELI, institution, and beyond.
- Opportunity for participants to share their projects and discuss, provide comments and feedback within the subgroup.



9:45 AM Break

10:00 AM Discussion of Your Real-Life Leadership Situations

Mentorship Groups

Notes:

- Each participant shares a real-life situation.
- Participants ask questions, share ideas, offer thoughts and insights where they can relate.
- Mentors provide coaching and guiding questions to assist in the process.
- Mentors provide reflective leadership coaching for participants.
 - Question: In what ways do I need to flex my leadership style to facilitate my ability to manage the real-life situation?
 - Question: What kind of framework is required? How do you typically prefer to function (structural, political, symbolic, social)?
 - Question: How is your preference affecting your ability to address this real-life situation?

12:15 PM Lunch

Notes:

- Mentor teams can use time to write their team-based mentorship assessments of the fellows-in-training during lunch.
- Demonstration of the APTA Learning Center design?

1:15 PM Personal Leadership Development Reflections

Mentorship Groups

- Share mentorship assessments with peers and mentors (complete self-assessment)
- Use the Personal Leadership Development Reflections worksheet.
- Consider the following items in your leadership reflections:
 - Leadership journal and reflections
 - Module 1, 2, and 3 content
 - Bolman and Deal Assessment including self- and peer assessments
 - CAPTE program director qualifications
 - Reflections from the past 3 months
 - Mentorship assessments

Notes:

- **Mentors collect their individual mentorship assessments from participants to review and then provide to Jody to scan and return to them.**
- Mentors review the leadership development plan to see if there are questions.
 - What have you learned from Modules 1, 2, 3 that contribute to your leadership development plan?
 - What are CAPTE's expectations for a PT and PTA Program Director?



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- *Mentors available to consult onsite*
 - *Clarify that the participant is not required to share their personal leadership plan reflections document, however they can discuss with others how they are getting resources to assist in their plan, and ideas where they seek assistance as a work-in-progress.*
 - *Intent is to get the participant thinking with an expectation to reflect and come back to continue to review and add to their plan as they progress through ELI.*
 - *Participants may elect individual mentoring, group discussion, or working independently.*
 - *Mentor role is as a resource and to offer guidance but not as an advisor.*

3:00 PM

Closing Summary and Next Steps

Jody Frost

- Share personal insights
- Planned launch Dates for Module 4 (October 9, 2015), Module 5 (November 24, 2015), and Module 6 (January 19, 2016)
- ELI Onsite Session #2: March 10-11, 2016 (location TBD)
- Complete post module assessments for online Modules 1, 2, and 3 (HUB Community)
- Complete first ELI onsite post assessment (HUB Community)
- Reminder: ELI Fellowship Networking Breakfast Session (Saturday; 7:00 - 9:00 AM, Room)

3:15 PM

Adjourn

3:30 PM

RECONVENE: MENTOR POST-EVALUATION SESSION**

4:00 PM

ADJOURN

****IMPORTANT NOTE: REFER TO PAGE 6 FOR ASSIGNMENTS BEFORE, DURING, AND AFTER THE ELI ONSITE SESSION.**



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Prior to the ELI Onsite Session

- **Submit one question for ELI faculty for each of the online modules (Module 1, 2, and 3) to address during the live faculty panel Webinar session by no later than 5:00 pm EDT on Friday, September 25, 2015.**
- Review *CAPTE Standards and Required Elements for Accreditation of PT Programs (effective January 1, 2016)*
 - Individual Academic Faculty, Program Director, Clinical Education Coordinator, Collective Academic Faculty, and Clinical Education Faculty; Pages 10 - 15
http://www.capteonline.org/uploadedFiles/CAPTEorg/About_CAPTE/Resources/Accreditation_Handbook/CAPTE_PTStandardsEvidence.pdf
(Requires Adobe Reader to open)
- Review *CAPTE Standards and Required Elements for Accreditation of PTA Programs (effective January 1, 2016)*
 - Individual Academic Faculty, Program Director, Clinical Education Coordinator, Collective Academic Faculty, and Clinical Education Faculty; Pages 10-15
http://www.capteonline.org/uploadedFiles/CAPTEorg/About_CAPTE/Resources/Accreditation_Handbook/CAPTE_PTStandardsEvidence.pdf (Requires Adobe Reader to open)
- Be prepared to share a real-life challenge during the ELI onsite session on day two, different from what you used as an example in Module 1.
- Complete your *Leadership Development Reflections Worksheet* (HUB Community, First ELI Onsite Session)
- Review the *Leadership Project Outline* and be prepared to discuss your ideas. (HUB Community, First ELI Onsite Session)
- **Mentorship Assessment: You will need to bring 4 printed single-sided copies with you to ELI** (HUB Community, First ELI Onsite Session)
- Bring your computer to be able to access and enter information in your Leadership Development Reflections and Leadership Project Outline and take notes during the faculty Webinar. Internet access will be available in the room.

During the ELI Onsite Session

- Complete your 4 mentorship assessments and provide feedback to both of your ELI mentors, your identified mentorship group colleague, and your self-assessment. (HUB Community, First ELI Onsite Session)

Following ELI Onsite Session - To Be Completed by October 8, 2015

- Complete ELI Online Modules 1, 2, and 3 Assessments (HUB Community, First ELI Onsite Session)
 - You will need to reopen this link 3 times to complete the same assessment for Modules 1, 2, and 3. Please complete the assessment in one sitting as this does not always save and let you return where you left off.
 - Be sure that you have completed in the APTA Learning Center your module posttest assessment to enable you to obtain CEUs.
- Complete ELI Onsite Assessment for the first session in one sitting (HUB Community, First ELI Onsite Session)
- Complete your mentorship hours in your mentorship log related to the onsite session and continue with the next series of online modules. (HUB Community, First ELI Onsite Session)



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ONSITE SESSION #2 - MENTORS
March 10-11, 2016
Pointe Hilton Tapatio Cliffs, Phoenix, AZ



THURSDAY, MARCH 10, 2016

7:30 AM	<p>Continental Breakfast (4th Fl. Deck West)</p> <ul style="list-style-type: none"> • Reconnecting with mentorship groups • Hand out mentorship assessments to mentors 	Mentorship Groups
8:00 AM	<p>Welcome Back! (Sunrise D, 4th Level)</p> <ul style="list-style-type: none"> • Reminders <ul style="list-style-type: none"> ○ Covenant and confidentiality! ○ Complete your weekly mentorship Excel spreadsheet • Seeking feedback: How is it going? 	Libby Ross
8:15 AM	<p>Getting Re-Engaged Again - Plenary</p> <ul style="list-style-type: none"> • Team commercial (mentorship subgroups) • Connecting the group 	Libby Ross (directions)
8:30 AM	<p>Reconnecting</p> <ul style="list-style-type: none"> • Subgroup members share their thoughts, progress, and general impressions 	Mentorship Groups
9:00 AM	<p>Shared Environmental Reactions - Plenary</p> <ul style="list-style-type: none"> • What about the content in Modules 4, 5, and 6... <ul style="list-style-type: none"> ○ most surprised you? ○ concerned you based on what exists in your institution and what you have seen happen? ○ reassured you based on what you have learned about your institution? 	ELI Mentors Facilitate
9:45 AM	Break	
10:00 AM	<p>Webinar Discussion with ELI Faculty Panel (<i>Recorded</i>)</p> <p>Fellows-in-Training pose prepared questions on camera</p> <ul style="list-style-type: none"> • Module 4: Student Affairs • Module 5: Legal and Policy Issues • Module 6: Human Resource Management 	<p>Plenary</p> <p>Priscilla Moss, MEd Steve Milam, JD James Kemper, PhD</p>
12:00 PM	<p>Lunch (Courtyard East)</p> <ul style="list-style-type: none"> • Distribute case vignettes by mentorship groups 	Libby Ross
1:00 PM	<p>Application and Integration Activities (4th Fl. Deck West)</p> <ul style="list-style-type: none"> • Case Discussion: Module 4 - Student Affairs – Green • Case Discussion: Module 5 - Legal and Policy Issues – Orange • Case Discussion: Module 6 - Human Resource Management – Blue 	Mentorship Groups



**EDUCATION LEADERSHIP INSTITUTE FELLOWSHIP
ONSITE SESSION #2 - MENTORS
March 10-11, 2016
Pointe Hilton Tapatio Cliffs, Phoenix, AZ**

2:00 PM	<p>Group Experts: Shared Case Discussion (4th Fl. Deck West)</p> <ul style="list-style-type: none"> • Reconstitute small groups with a representative from each subgroup for Case 1, 2, and 3 with two mentors that are not from the same subgroup. • Share the case and discussion from your small groups and respond to questions and issues raised by others in your group. 	Mentorship Groups
3:15 PM	Break (Sunrise D)	
3:30 PM	<p>Insights, Reflections, Challenges and More! (Sunrise D)</p> <ul style="list-style-type: none"> • Program director initiates session with 2-3 questions. <ul style="list-style-type: none"> ○ Please share how you navigated your leadership journey within higher education and the profession? ○ Please share one of your challenges and what you learned as a result; if you could have done something different what would that have been? • ELI fellows-in-training pose questions of <i>mentors</i> about their leadership journeys and expertise. • Mentors share stories as related to module content. 	ELI Mentor – Panel
4:45 PM	<p>Another Day in ELI! (Sunrise D)</p> <ul style="list-style-type: none"> • Reflections on the day • Prepare for real life situations tomorrow 	Libby Ross
5:00 PM	Adjourn	
5:30 PM	<p>Time to Celebrate! Dinner Together in Phoenix (Tarbell's)</p> <ul style="list-style-type: none"> • Meet in hotel lobby for shuttle to restaurant 	All

FRIDAY, MARCH 11, 2016

7:30 AM	Continental Breakfast (4th Fl. Deck West) TBD	
8:00 AM	<p>Reflective Leadership Using Real-Life Situations (Sunrise D)</p> <ul style="list-style-type: none"> • Fellows-in-training share real life situations • Fellows-in-training can ask questions, share ideas, discuss further and offer thoughts and insights where they can relate • “Action learning” with mentors asking questions to facilitate learning from one another • Mentors facilitate reflective leadership and learning 	Mentorship Groups



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10:00 AM	Break (4th Fl. Deck West)	
10:15 AM	Role Play Situation with Fellows-in-Training (Sunrise D) <ul style="list-style-type: none"> • Based on the scenario provided, assign different roles to each mentorship group member and have them engage in the situation in character. • Situation includes Human Resources Manager, Legal Counsel, Student Affairs, Student, Faculty, Program Director. • Mentors serve as the observer role in following up on observations and engaging everyone in case analysis. • Mentors designate roles for fellows-in-training. • Reminder to invest in character being played. • <i>In the scenario in the role of Program Director, would you have done something differently?</i> 	Mentorship Groups
11:00 AM	Role Play Situation Reflections (4th Fl. Deck West) <ul style="list-style-type: none"> • What was different from reading and discussing cases to role playing the situation? • What were your challenges? • What additional information would have been helpful? • Is there anything you might do differently if you did this again? 	Mentorship Groups
12:00 PM	Lunch (Courtyard East) <ul style="list-style-type: none"> • Complete mentorship assessments (mentors, self, and peer) • Program director will bring copies of these assessments for Mentors. • Provide role play situations at lunch to everyone to review. 	
1:00 PM	Sharing Leadership Projects and Presentation Plans (4 th Fl. Deck West) <ul style="list-style-type: none"> • Share present status on leadership projects. • Outline/work to date with challenges and successes. • Fellows-in-training provide feedback and discuss next steps. 	Mentorship Groups
2:00 PM	Break	
2:15 PM	Personal Leadership Development Reflections (4th Fl. Deck West) <ul style="list-style-type: none"> • Share mentorship assessments with peers and mentors • Consider the following items in your leadership reflections: <ul style="list-style-type: none"> ○ Leadership Development Reflections Worksheet ○ Leadership journal and reflections ○ Module 4, 5, and 6 content ○ Reflections from the past 5 months ○ Mentorship assessments and self-assessment 	Mentorship Groups



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Mentor Notes:

- *Mentors collect individual mentorship assessments from fellows-in-training about the mentors for review; provide originals to Libby to scan and return to mentors.*
- *Review leadership development reflections for questions.*
- *Clarify the fellow-in-training is not required to share their personal leadership reflections document. They can discuss with others how they are accessing resources to assist in their leadership growth and ideas where they can seek assistance as a work-in-progress.*
- *Intent is to get the participant thinking with an expectation to reflect and come back to continue to review and add to their leadership as they progress through ELI.*

3:00 PM	Closing Summary and Next Steps (Sunrise D)	Libby Ross
	<ul style="list-style-type: none">• Shared Fellows-in-Training and Mentor Insights• Schedule for accessing final modules:<ul style="list-style-type: none">○ Module 7: Resources/Financial Management – March 18, 2016○ Module 8: Program Development and Assessment – April 29, 2016○ Module 9: Partnerships, Influence, and Relationships – June 3, 2016• July 13-14, 2016 3rd ELI Onsite Session and Graduation (location Seattle)	
3:30 PM	Adjourn ELI Onsite Session for ELI Fellows-in-Training	
3:45 PM	Reconvene ELI Mentors for follow-up focus group (Sunrise D)	
4:15 pm	Adjourn ELI Mentors	



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REQUIRED ASSIGNMENTS

Complete Assignments Prior to the 2nd Onsite Session

- Submit one question about the content for each of Modules 4, 5, and 6 directly to Libby Ross (libbyross@apta.org) for ELI faculty to address during the faculty panel session by no later than **March 4, 2016**.
- Update your Leadership Reflections Worksheet (Word document) and be prepared to access it onsite in the ELI Program 2015-2016 community HUB, Second Onsite session.
- Updated your Leadership Project Outline (Word document) located in the ELI Program 2015-2016 community HUB, Second Onsite session and be prepared to access and share it onsite.

Complete During the 2nd Onsite Session

- Bring **4 single-sided printed copies** of the mentorship assessment (2 mentors, 1 self-assessment, 1 peer assessment). Mentorship Assessments can be found in the ELI Program 2015-2016 community HUB, Second Onsite session.
- Prepare questions to pose of ELI mentors regarding their higher education and professional experiences, expertise, and insights.
- Think about a real-life situation associated with content from Modules 4, 5 and 6. Be prepared to discuss this challenge during the second day of the ELI onsite session.
- Bring your computer to be able to enter additional information into your Leadership Development Reflections Worksheet and Leadership Project Outline. The room will have Wi-Fi access.

Complete After the Session by March 18, 2015

- Complete ELI Online Module Assessments for Modules 4, 5, and 6. These assessments can be accessed in the ELI Program 2015-2016 community HUB, Second Onsite session. You will need to log in to complete this assessment 3 times to evaluate Module 4, Module 5, and Module 6. Please make sure to correctly label the Module being assessed and your correct cohort.
<https://survey.vovici.com/se/502D66961034E627>
- Complete 2nd ELI Onsite Assessment that can be accessed in the ELI Program 2015-2016 community HUB, Second Onsite session. Please make sure to correctly label the session that you are evaluating.
<https://survey.vovici.com/se/502D66965E1BCFBD>



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WEDNESDAY, JULY 13, 2016

7:30 AM	Breakfast (Lakefront A)	All
8:15 AM	Welcome Back! (Lakefront A) <ul style="list-style-type: none"> • Reminder: Covenant and Confidentiality • Where Are We Now? • Information about accessing ELI modules upon graduation (Copyright, download, copying, post session assessments) 	Libby Ross
8:30 AM	Exploring Your Environment (Lakefront A or Terrace) <ul style="list-style-type: none"> • What about the content in Modules 7, 8, and 9... <ul style="list-style-type: none"> ○ Motivated you? ○ Left you with unanswered questions or wanting to learn more? ○ Will challenge your program and your institution? ○ Reassured you, based on what you have learned about your program and institution? 	Subgroups
9:15 AM	Shared Environmental Reactions (Lakefront A) <ul style="list-style-type: none"> • What were your small group perceptions in response to these questions for Modules 7, 8, and 9? • What are the group's common themes and impressions? 	All
9:45 AM	Break (Cascade A)	
10:00 AM	Webinar Discussion with ELI Faculty Panel (Lakefront A) <i>(Fellows-in-training pose their questions in person)</i> <ul style="list-style-type: none"> • Module 7: Resources/Financial Management - Melanie Gehen, MS, HSA • Module 8: Program Development and Assessment - Robert Mundhenk, PhD • Module 9: Relationships, Influence, and Partnerships - Deborah Waddill, PhD 	
12:00 PM	Lunch (Lakefront B) <ul style="list-style-type: none"> • Distribute case vignettes to share with mentorship subgroups. • Distribute Budget Negotiation role play. • Complete mentorship assessments. • Complete Bolman and Deal Leadership Assessment. 	All
1:00 PM	Application and Integration Activities (Lakefront A or Terrace) <ul style="list-style-type: none"> • Each group discusses all 3 cases starting with the assignment below (25 mins allotted for each case; mentors rotate to all 3 mixed groups keeping the same case.) <ul style="list-style-type: none"> ○ Discussion Case 7: Program Expansion (blue mentors) ○ Discussion Case 8: Accreditation (orange mentors) ○ Discussion Case 9: Developing Partnerships (green mentors) 	Mentors/Mixed Groups
2:15 PM	Role Play Situation (Lakefront A or Terrace) <ul style="list-style-type: none"> • Budget Negotiation Role Play (25 mins/segment) <ul style="list-style-type: none"> • Divide into two groups to play the roles. (25 mins) 	Mentors/Subgroups



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- Reconvene as a mentorship group and discuss issues raised during each role play. (25 mins)
- Redo the negotiation role play changing the fellow-in-training pairings and roles to redo the role play with new insight. Allow time for post discussion within your smaller groups. (25 mins)

3: 30 PM Break

3:45 PM **Complete Leadership Reflections Plan (Lakefront A or Terrace)** Mentors/Subgroups

- Discuss/review your leadership plan based on your reflections with consultation available from mentors and peers.
- Identify future steps in leadership development.
- Share mentorship assessments spanning from the 2nd to the 3rd ELI onsite session.
- Share future ELI alumni opportunities for networking and peer mentoring (ELI Graduate HUB community, Facebook, e-mail, journal clubs, ELC alumni reunion)

4:45 PM **Closing Comments (Lakefront A)** Libby Ross

- Evening assignments
 - Assign the 16 summary worksheets for the leadership projects to 3 fellows-in-training (1 from each subgroup) to read carefully.
 - Homework: Each Fellow-in-Training discussant prepares to pose new questions for the individual's leadership project summary.
 - Begin to complete online module post assessments

5:00 PM Adjourn

6:00 PM Dinner with mentors, fellows-in-training, and guests (Terrace)

THURSDAY, JULY 14, 2016

6:00 AM Sunrise Walk (Hotel Lobby) Open to All

7:30 AM **Breakfast – Welcome Back!** (Lakefront A)

8:00 AM **Leadership Project Discussions** (Lakefront A) Fellows-in-Training

- 3 fellows-in-training assigned to review the Leadership project facilitates the initial discussion by seeking clarification, posing questions, etc. (12 minutes per participant project)

10:00 AM Break

10:15 AM **Leadership Project Discussions** (continued) Fellows-in-Training

12:15 PM Lunch



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1:15 PM	<p>Challenging Participant Cases Discussion (Lakefront A or Terrace)</p> <ul style="list-style-type: none"> • Fellows-in-Training discuss real-life situations associated with any ELI program content that may include cases from the past, currently in progress, and still pending. • Mentors pose probing/reflective questions about the cases. <ul style="list-style-type: none"> ○ What is needed to address challenges? ○ How do you approach the challenge and maintain a positive mindset? ○ How will you promote the leadership role of a program director in the future? ○ How will you consider future succession planning? 	Mentors/Subgroups
		Mentors Lead
3:00 PM	Break	
3:15 PM	<p>Fellows-in-Training Complete ELI Assessments (Lakefront A or Terrace)</p> <ul style="list-style-type: none"> • Complete the ELI Program Fellow Graduate Outcome Survey. • Complete assessments for ELI Modules 7, 8, and 9. • Complete ELI 3rd onsite session survey. 	
4:00 PM	<p>Final Insights, Reflections, Challenges and More! (Plenary Circle)</p> <p><i>Leadership</i></p> <ul style="list-style-type: none"> • How has the program content shaped your role as a leader? • What are possible opportunities for leadership in higher Education, within your institution/environment, the profession, or interprofessionally? • What have you learned through past failures as a result of this program? How have these failures contributed to positive outcomes in the past year? • What can you anticipate about these issues in the future? • How do you feel about leadership now? <ul style="list-style-type: none"> ○ Recall the first ELI onsite session opening activity last October...would you now select a different photo to reflect your role as a leader or was the one that you selected still a good fit? • How have you been transformed by ELI? • What has been the most powerful learning from ELI? • Have your career leadership goals changed as a result of ELI? <p><i>Reflections</i></p> <ul style="list-style-type: none"> • How do you now manage situations on the fly? • How will you use your leadership development plan to move forward? • How does the role of community influence your leadership? • What will you miss <u>least</u> about ELI? • What will you miss <u>most</u> about ELI? 	ALL
5:00 PM	Adjourn	



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EVENING CELEBRATION

- 6:00 PM **Let's Celebrate: Cocktails and Reflections!** (Foyer)
- Cohort 2016 photo, Mentorship photos, speaker photos
- 7:00 PM **Welcome and Congratulations** (Cascade)
- Fellows, mentors, guests, and family
 - Acknowledge and recognize family members in support of the ELI Fellow!
 - Message from APTA President – Sharon Dunn
- 7:00 PM **Dinner**
- 8:00 PM **Keynote Speaker:**
Pamela W. Duncan, PhD, PT, FAPTA, FAHA
Professor, Department of Neurology
Senior Policy Advisor for Innovations and Transitional Outcomes
Wake Forest Baptist Medical Center
- 8:45 PM **Fellow Recognition Ceremony** (Mentors award ELI certificates, ribbons, and pins)
- 9:10 PM **Welcome to the Education Leadership Community**
- Messages from ACAPT President and Education Section President
 - ELI Fellows Alumni Community and Networking (share point and Facebook)
 - ELC (October 7-9, 2016 in Phoenix, Arizona)
 - *ELI Alumni Breakfast at ELC (date TBA)*
- 9:15 PM **Dessert and Coffee**
- 9:30 PM **Congratulations ELI Fellows! The celebration continues...?**



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ASSIGNMENTS FOR FELLOWS-IN-TRAINING

PRIOR TO THE ONSITE SESSION - Materials and links are available under "3rd Onsite" folder on the APTA Hub.

1. Questions for Faculty
 - Provide 1 question each for Modules 7, 8, and 9 to be posed to faculty during the webinar by **July 6, 2016**. Use form at <https://fs3.formsite.com/apta/FacultyQuestions/index.html>.
2. Leadership Project Worksheet Summary
 - Prepare a 1-page Leadership Project Worksheet Summary for sharing with your peer colleagues using the format provided on the HUB.
 - E-mail your 1 page summary of leadership projects to libbyross@apta.org by **July 6, 2016**. All summaries will be posted on the HUB prior to the session for everyone to access.
 - Download and read all of the 1 page Leadership Project Worksheets before July 13.
3. Supervisor Contact
 - Complete the online form with the name, title, and email of your direct supervisor by **July 6, 2016** to be able to send the ELI Fellow New Graduate Supervisor Survey. <https://fs3.formsite.com/apta/supervisor/index.html>
4. Leadership Reflections
 - Update your electronic Leadership Reflections with items completed and for ongoing future development to be used onsite. Complete by **July 12, 2016**. (*Personal document*)
5. Bolman and Deal Assessment
 - Complete your Bolman and Deal Assessment and Self-Assessment of Leadership Skills by July 12.
 - Bring a printed version with you to the session.
6. Bring your photo with you that you selected during the 1st ELI onsite session.

DURING THE ONSITE SESSION

1. Be prepared to pose your question of faculty during the live webinar session on camera.
2. Prepare real life cases for presentation on Day 2 for open discussion among fellows-in-training and mentors.
3. Complete [mentor/participant/self-assessments](#).
4. Begin online surveys listed below – Bring your computer.

AFTER THE ONSITE SESSION – Due by July 31, 2016

- Surveys and Assessments
 - [ELI Program Fellow Graduate Outcome Survey](#).
 - [Modules 7, 8, and 9 Assessments](#).
 - [3rd Onsite Session Assessment](#).
- Submit your final [Mentorship Log](#) to libbyross@apta.org.
- [Leadership Summary Booklet Form](#): Complete and submit your 3 ELI goals, 3 ELI expectations, and a short synopsis of your leadership project to be published for the Education Leadership Conference on October 7-9 2016 in Phoenix, AZ and dissemination to attendees.



Leadership Development Reflections

Current Self-Assessment

(Consider Bolman and Deal Assessment, Self- and Peer Assessments, Mentorship Assessments, ELI Module Content, Institutional Mentors, journal entries, etc)

- **Leadership Strengths**

- **Areas for Leadership Development**

- **Personal Leadership Reflections: How am I changing as a leader?**

Future Personal Leadership Goals

- 1.
- 2.
- 3.

Achieving Personal Leadership Goals

(What do I need to achieve my personal leadership goals?)

- **Personal Leadership Questions to Explore**

- **Leadership Mentor Resources**

- **Reading Resources**



Leadership Project Outline

1. Project Title
 2. Project Background
 - a. Include the project description, its purpose, and context in which it will occur.
 3. Project Outcomes
 - a. Define project outcomes that are S.M.A.R.T. (specific, measurable, achievable, realistic, and time referenced)
 4. Potential Challenges and Opportunities
 - a. Consider both internal and external challenges and opportunities that could affect your project outcome and how you might overcome each.
 - b. Consider how your leadership style might impact your ability to attain your desired outcomes.
 5. Resources
 - a. Consider the resources you have available and any additional resources that may be needed including human, financial, and physical resources.
 6. Strategies
 - a. Consider the strategies you will use to complete your project including any required data, areas that need to be negotiated, relationships and partnerships that need to be developed, and potential legal implications.
 7. Anticipated Benchmarks and Timelines
 - a. Define anticipated outcomes and when you will achieve specific milestones in your project.
-
8. Analysis/Assessment of Outcomes (Onsite Sessions 2 & 3)
 - a. Provide evidence for the achievement of the project outcomes.
 - b. Assess the degree to which you achieved the project outcomes.
 9. Dissemination and Accountability (Onsite Sessions 2 & 3)
 - a. Define to whom you are accountable for this project and its outcomes.
 - b. Identify where, how, and to whom you will disseminate your project outcomes.



ELI Application Assessment Form

Please take a moment to provide feedback on your experiences with the application process for the 2016-17 Education Leadership Institute (ELI) Fellowship. Responses are due by April 1. We would greatly appreciate your valuable feedback. Responses will be used to evaluate and enhance the ELI application process for members in the future. The ELI Work Group will only have access to the de-identified results. Aggregate results may be reported to other ELI stakeholders, as needed. Please contact libbyross@apta.org, if questions. Thank you!

Name of ELI Applicant *

How were you made aware of the Education Leadership Institute (ELI) Fellowship? Check all that apply. *

- ACAPT Blast-of-the-Week Newsletter
- APTA Website
- APTA Friday Focus "Professional Issues" Newsletter
- Colleague
- Component Leadership Newsletter
- CSM: Education Section or SIG Meeting
- CSM: Residency/Fellowship Reception
- CSM: Exhibit Hall
- Education Leadership Conference (ELC)
- Education Section e-Newsletter
- ELI Applicant
- ELI Fellow-in-Training (individual is currently in the program)
- ELI Fellow (graduate)
- ELI Mentor
- ELI Work Group Member
- ELI Program Director
- PT or PTA Program Director
- Other (describe)

What influenced your decision to apply to the ELI Fellowship?**Indicate the extent to which you agree or disagree with the following statement: The March 1 deadline extension was helpful to me. ***

- Strongly Agree
- Agree
- Neutral
- Disagree
- Strongly Disagree

Indicate the extent to which you agree or disagree with the following statement: I received timely responses about the status of my application. *

- Strongly Agree
 Agree
 Disagree
 Strongly Disagree

Was the application process clearly communicated? *

- Yes
 No

Did you have a clear understanding of the admission criteria? *

- Yes
 No

In what ways did you find the APTA ELI Fellowship webpage most helpful?

In what ways did you find the APTA ELI Fellowship webpage least helpful?

Identify any barriers you encountered in applying.

Please share any additional feedback about the ELI application process.



ELI Mentorship Assessment Form

Respond to the items on this page in the order shown. Open the link and complete the form for each person you assess during the ELI onsite session (2 mentors, 1 self-assessment, 1 peer assessment)

Select ELI Session *

- Mentorship Assessment I (Onsite Session #1)
 Mentorship Assessment II (Onsite Session #2)
 Mentorship Assessment III (Onsite Session #3)

Are you an ELI fellow-in-training or mentor? *

- Fellow-in-Training
 Mentor

NAME OF ASSESSOR: Select your name from the ELI mentor list: *

NAME OF CO-ASSESSOR (mentor partner), if applicable:

NAME OF ASSESSOR: Select your name from the ELI fellows-in-training list: *

Are you entering an assessment of a fellow-in-training or mentor? *

- Fellow-in-Training
 Mentor

NAME OF PERSON BEING ASSESSED: Select the name of the ELI mentor you are assessing. *

NAME OF PERSON BEING ASSESSED: Select the name of ELI fellow-in-training you are assessing. *

Name of the Mentor Being Assessed: [pipe:11]

Name of the Fellow-in-Training Being Assessed: [pipe:12]

Shares his/her knowledge and experience. * Describes own leadership experiences.* Uses past experiences to illuminate learning content.* Seeks out leadership experiences of others as a learning experience.* provides contemporary information based upon readings, discussion, and reflection. *

- Strongly Agree
 Agree
 Disagree
 Strongly Disagree

Listens actively and non-judgmentally.* Uses good listening skills in the group.* Is open to difference perspectives and experiences. *

- Strongly Agree
 Agree
 Disagree
 Strongly Disagree

Asks questions and makes suggestions that promote reflection.* Thinks before asking or questioning.* Bring suggestions and different ideas to the discussion.* Asks questions that facilitate reflection and discussion.* Incorporates concepts from the curricular content and literature as a part of reflective discussions with mentors. *

- Strongly Agree
 Agree
 Disagree
 Strongly Disagree

Gives and seeks thoughtful, candid and constructive feedback. * Is open and responsive to feedback. * Provides constructive feedback to others. * Asks and answers the 'challenging questions'. *

- Strongly Agree
 Agree
 Disagree
 Strongly Disagree

Provides support and encouragement.* Is supportive of others in the group.* Builds rapport and trust.*

Motivates self and others.* Highlights the rewards of leadership. *

- Strongly Agree
 Agree
 Disagree
 Strongly Disagree

Is regularly accessible.* Responses in a timely manner to electronic and face to face communications.* Is engaged and attentive in meetings and small group work.* Makes self available for meetings and group assignments. *

- Strongly Agree
 Agree
 Disagree
 Strongly Disagree

Acts as an advocate for others in the mentorship relationship.* Promotes camaraderie within the group.*

Seeks to engage all members in the group.* Respects confidentiality and trust within the group. *

- Strongly Agree
 Agree
 Disagree
 Strongly Disagree

Summary Strengths

Summary Areas of Growth:

Do you have any feedback to share on this online version of the ELI mentorship assessment form? If you previously submitted comments, you can leave this box blank.

Course Title: ELI: Module 1- Personal Leadership and Management

Category: Online

CEUs: 4.2 CEUs/42 contact hours/CCUs (with posttest)

Level of Audience: Multi-level

Description:

The Personal Leadership and Management (PLM) Module is the foundational module for the APTA Education Leadership Institute (ELI). Welcome to the ELI! You have been identified as a future leader and the ELI will assist you in maximizing your leadership potential. In the PLM module, you will begin your leadership development journey through a review contemporary leadership literature, leadership self assessments, and reflections from leadership theorists and practitioners that highlight personal leadership as it is applied to the management of higher education institutions. The Bolman and Deal (2008) theoretical framework—or the Four Frames Approach—is used as the basis for our collaborative exploration of personal leadership, and applicable throughout the entire ELI. This framework is informed by additional readings and discussions that focus on personal leadership.

A PLM Library is provided, which includes required and recommended texts. Each PLM Outcome Objective will be linked to a required text or texts. Those texts will be identified at the beginning of each PLM Outcome Objective. Embedded in each objective are personal reflection opportunities and assignments. The assignments will be discussed during the fall on-site component of ELI.

Learning Objectives:

After completing this course you will be able to:

1. Explain and apply contemporary leadership theories, principles, and values that are relevant to your personal leadership development.
2. Identify and explain management strategies that are grounded in leadership principles, ones that you can apply in institutional settings, strengthening your capacity to navigate the environment of higher education.
3. Demonstrate leadership behaviors that are authentic, grounded in institutional and professional values, and achieve the intended results.
4. Justify and explain decisions and actions to others based on an understanding of the academic administrator's responsibilities, a sense of duty to represent faculty and students, and alignment congruent with institutional values, priorities, and directives.
5. Apply methods of management and principles of leadership, and the use of reflection, to navigate the changing higher education environment, empowering you to better respond to the opportunities, threats, and challenges inherent in the contemporary higher education environment.

Agenda:

Required readings (listing found in resources):	1500 minutes
Introduction and Overview:	30 minutes
Section 1:	40 minutes
Section 2:	40 minutes
Section 3:	20 minutes
Section 4:	30 minutes
Section 5:	30 minutes
Conclusion:	15 minutes
Posttest:	60 minutes
Journaling Assignments	240 minutes
Discussion Forum Postings	210 minutes
Self-Assessment and analysis	30 minutes
Activities/Reflective exercises	240 minutes
Feedback from others forms	30 minutes
Total:	2515 minutes
Total Minutes divided by 60:	41.91
Total CEUs:	4.2 CEUs

References:

1. Kouzes JM, Posner BZ. The Leadership Challenge: How to Make Extraordinary Things Happen in Organizations. 5th Edition. San Francisco, CA: Jossey-Bass; 2012.
2. Covey SMR. The Speed of Trust: The One Thing That Changes Everything. New York, NY: Simon and Schuster Free Press; 2008.
3. Fisher R, Ury W. Getting to Yes: Negotiating Agreement Without Giving In. Random House. 2012.
4. Bolman LG, Deal TE. Reframing Organizations: Artistry, Choice, and Leadership. 4th ed. San Francisco, CA: Jossey-Bass; 2008.
5. Bolman LG, Gallos J. Reframing Academic Leadership. San Francisco, CA: Jossey-Bass; 2011. (Sections 4, 5)
6. Madsen SR. On Becoming a Woman Leader: Learning from the Experiences of University Presidents. San Francisco, CA: Jossey-Bass; 2008. (Section 5)
7. Meyerson DE. Tempered Radicals: How Everyday Leaders Inspire Change at Work. Boston, MA: Harvard Business School; 2003.
8. Northouse P. Leadership: Theory and Practice. 6th ed. Thousand Oaks, CA: Sage Publications; 2013.
9. Whitney D, Trosten-Bloom A, Rader K. Appreciative Leadership. New York, NY: McGraw-Hill; 2010. (Section 1)
10. Bolman LG, Deal TE. Leading with Soul: An Uncommon Journey of Spirit, Revised. 3rd ed. San Francisco, CA: Jossey-Bass; 2011.
11. Collins J. Good to Great and the Social Sectors. Boulder, CO: Jim Collins; 2005.
12. Hughes R, Ginnett R, Curphy G. Leadership: Enhancing the Lessons of Leadership. 5th ed. New York, NY: McGraw-Hill; 2006. (Section 1)
13. Kouzes JM, Posner BZ. The Leadership Challenge: How to Make Extraordinary Things Happen in Organizations. 5th Edition. San Francisco, CA: Jossey-Bass; 2012.

Module 1 Posttest:

1. When considering leadership, you must include characteristics of the leader, behaviors of the followers, and the situation. (Module 1/Objective 1)
 - a. **True**
 - b. False
2. Leadership is driven by both personality and group processes. (Module 1/Objective 1)
 - a. **True**
 - b. False
3. Leadership is an observable, learnable set of practices. (Module 1/Objective 1)
 - a. **True**
 - b. False
4. The most important attribute of appreciative leadership is: (Module 1/Objective 1)
 - a. Appreciating everyone's strengths.
 - b. Enthusiasm.
 - c. **Personal leadership awareness and capacity.**
 - d. Individual leadership drive.
5. All leaders have: (Module 1/Objective 1)

- a. **Both a light side and shadow side.**
 - b. Integrity and authenticity.
 - c. Certainty about the right course of action.
 - d. Someone who has served as a mentor.
6. To understand the “four frame approach,” a leader/manager must understand his/her preferred frames. (Module 1/Objective 2)
- a. **True**
 - b. False
7. The structural frame is the best frame to use in any organization. (Module 1/Objective 2)
- a. True
 - b. **False**
8. The symbolic frame is the hardest frame to understand and implement. (Module 1/Objective 2)
- a. **True**
 - b. False
9. In higher education environments, leaders need not be concerned with the political frame. (Module 1/Obj. 2)
- a. True
 - b. **False**
10. The best managers and leaders regularly employ the “four frame approach” because complex challenges require artistic solutions. (Module 1/Objective 2)
- a. **True**
 - b. False
11. Practiced leaders always have clarity and pursue positions that are consistent with their values. (Module 1/Objective 3)
- a. True
 - b. **False**
12. Tempered radicals are always seeking radical change in organizations. (Module 1/Objective 3)
- a. True
 - b. **False**
13. It is not unusual for individuals to experience misalignment with their organization’s culture. (Module 1/Objective 3)
- a. **True**
 - b. False
14. One’s gender has absolutely no impact on how she or he is perceived as a leader. (Module 1/Objective 3)
- a. True
 - b. **False**
15. Tempered radicals navigate a continuum from quiet resistance to organizing collective action. (Module 1/Objective 3)
- a. **True**
 - b. False
16. Authentic leaders have an obligation to: (Module 1/Objective 4)
- a. **Know themselves.**
 - b. Disclose their ego struggles with all coworkers.
 - c. Be the Rosa Parks of their organization.
 - d. Always represent the underdog.
17. Kouzes and Posner draw on Berlew’s ideas to inform their six effective communication strategies. (Module 1/Objective 4)
- a. **True**
 - b. False

18. Charisma is absolutely necessary for leaders to be seen as effective. (Module 1/Objective 4)
- True
 - False**
19. A typical response to a challenging situation is for a leader to initially be very self-protective. (Module 1/Objective 4)
- True**
 - False
20. Bolman and Gallo's four habits of learning for leadership effectiveness include waiting for feedback from colleagues. (Module 1/Objective 4)
- True
 - False**
21. In Madsen's study the common denominator was the capacity to be a participant-observer. (Module 1/Obj. 5)
- True**
 - False
22. Active reflection is an essential element of being a good participant-observer. (Module 1/Objective 5)
- True**
 - False
23. Academic leadership requires reframing to deal with the complexity of issues in contemporary higher education. (Module 1/Objective 5)
- True**
 - False
24. Feeling and faith have absolutely no role in effective leadership. (Module 1/Objective 5)
- True
 - False**
25. Culture is the most difficult element of change management. (Module 1/Objective 5)
- True**
 - False

Course Title: ELI: Module 2- Higher Education, Health Care Systems, and Society**Category:** Online**CEUs:** 4.0 CEUs/40 contact hours/CCUs (with posttest)**Level of Audience:** Multi-Level**Description:**

In this second module, we will explore domains that will be the contextual settings for your practice as an academic leader. These domains will be:

- Higher education,
- Health care systems, and
- Society.

Realize that these domains are being artificially separated to address them in this particular learning module, but that in reality they intersect and mutually influence each other in a complex manner. There are 4 outcome objectives presented to structure your learning.

To facilitate deep learning of the presented material, questions and activities will be inserted along your learning journey. A final set of learning activities will serve as foundations for discussion during the fall on-site component of ELI.

Learning Objectives:

After completing this course you will be able to:

1. Differentiate among types of higher education institutions and evaluate the relationship between type of institution and your concomitant role as an academic leader.
2. Explore mechanisms of oversight in higher education and analyze their impact on and importance to physical therapy education.
3. Evaluate the influence of major trends and issues in health care on physical therapy education.
4. Evaluate the influence of major trends and issues in society on physical therapy education.

Agenda:

Topic	Minutes
Required readings (listing found in resources):	1500
Introduction and Overview:	20
Section 1:	55
Section 2:	40
Section 3:	45
Section 4:	30
Conclusion:	20
Posttest:	60
Journaling Assignments	200
Discussion Forum Postings	180
Activities/Reflective exercises	240
Total:	2390
Total Minutes divided by 60:	39.83
Total CEUs:	4.0 CEUs

Module 2 Posttest

1. Early higher education in the U.S. was grounded in: (Module 2/Objective 1)
 - a. Philosophy
 - b. Religion**
 - c. Liberalism
 - d. Equality
 - e. All of the above

2. The most valued institution of higher education in today's society is the: (Module 2/Objective 1)
 - a. Tribal college
 - b. Liberal arts institution
 - c. Vocational training
 - d. Research university**
 - e. All of the above

3. The Morrill Act resulted in: (Module 2/Objective 1)
 - a. Ivy league institutions
 - b. Private institutions
 - c. Land grant institutions
 - d. For profit institutions
 - e. All of the above**

4. What category of institution has the worst graduation rates? (Module 2/Objective 1)
 - a. Not for profit
 - b. For profit**
 - c. State institutions
 - d. Private institutions
 - e. Newer institutions

5. The rating system for colleges and universities was developed by: (Module 2/Objective 1)
 - a. The Carnegie Foundation**
 - b. CHEA
 - c. CAPTE
 - d. U.S. Department of Education
 - e. All of the above

6. Fiduciary responsibility for institutions of higher education is assumed by whom? (Module 2/Objective 1)
 - a. CAPTE
 - b. University's Board of Trustees**
 - c. University's Students
 - d. Parents of students in the university
 - e. All of the above

7. Private and public higher education institutions in New Jersey are accredited by which regional accreditor? (Module 2/Objective 2)
 - a. New England Association of Schools and Colleges
 - b. Southern Association of Colleges and Schools
 - c. Middle States Association of Schools and Colleges**
 - d. North Central Association of Schools and Colleges
 - e. Northwest Commission on College and Universities

8. Which type of institution typically does not have a regional accreditation? (Module 2/Objective 2)
- Research universities
 - Tribal Colleges
 - Private institutions
 - Public institutions
 - Proprietary institutions**
9. Accreditation is based on: (Module 2/Objective 2)
- Peer review and self assessment**
 - U.S. government control
 - Professional autonomy
 - Past performance of the institution
 - All of the above
10. Accreditation reflects societal innovation to address needs including more transparency, great student success and assessment of: (Module 2/Objective 2)
- Standards
 - Faculty
 - Process
 - Financial status
 - Outcomes**
11. Ideally, faculty meetings should be run as a: (Module 2/Objective 2)
- Report session
 - Decision making session
 - Dialogue**
 - Administrative update
 - All of the above
12. In 2006, what were U.S. national health expenditures? (Module 2/Objective 3)
- 75 billion
 - 150 billion
 - 1 trillion
 - 2.1 trillion**
 - None of the above
13. What was the per capita expenditure of U. S. health care dollars in 2006? (Module 2/Objective 3)
- \$365
 - \$2,700
 - \$7,026**
 - \$28,000
 - None of the above
14. Which country does not have universal health care? (Module 2/Objective 3)
- United Kingdom
 - Australia
 - New Zealand
 - Netherlands
 - United States**
15. Primary care consists of all of the following except? (Module 2/Objective 3)
- First contact provider
 - Longitudinal following over time

- c. Comprehensive care
 - d. Coordinated and integrated care
 - e. Universal health coverage**
16. What social movement played the largest role in current U.S. health care configuration? (Module 2/Objective 3)
- a. Accreditation
 - b. States rights
 - c. The union movement**
 - d. The progressive movement
 - e. None of the above
17. In 2050, the U.S. population will be bigger, older and more: (Module 2/Objective 4)
- a. Diverse**
 - b. Homogeneous
 - c. Rural
 - d. Inland
 - e. All of the above
18. In 2050, what percentage of the population will be over 65? (Module 2/Objective 4)
- a. 8.1%
 - b. 12.8%
 - c. 20.2%**
 - d. 30.4%
 - e. None of the above
19. Which of the following states will continue to be one of the largest destinations for immigrants to the U.S.? (Module 2/Objective 4)
- a. California
 - b. New York
 - c. Texas
 - d. Florida
 - e. All of the above**
20. Which of the following is among the 10 leading causes of death in the U.S. from 2007? (Module 2/Objective 4)
- a. AIDS
 - b. Amyotrophic Lateral Sclerosis
 - c. Multiple Sclerosis
 - d. Suicide
 - e. Alzheimer's Disease**
21. Which student services are likely to be the most needed in the next decade? (Module 2/Objective 4)
- a. Tutoring
 - b. Psychological support**
 - c. Athletic training
 - d. Manners
 - e. All of the above
22. Which of the following would CAPTE be considered? (Module 2/Objective 4)
- a. Regional accreditor
 - b. Federal accreditor
 - c. Specialty accreditor**
 - d. CHEA accreditor
 - e. All of the above

23. For a department chair, the most important variable to manage is: (Module 2/Objective 4)
- a. Accreditation
 - b. Student performance
 - c. **Change**
 - d. Faculty
 - e. All of the above

Course Title: ELI: Module 3 - Institutional Leadership and Management

Category: Online

CEUs: 3.6 CEUs/36 contact hours/CCUs (with posttest)

Level of Audience: Multi-Level

Description:

In this 5-part module we will review contemporary leadership models that are useful in institutions and how management skills can complement leadership. There are 5 outcome objectives to assist you in structuring your study. A required reading list is provided with a recommended text for your leadership library shelf. Embedded in each objective are personal reflection opportunities and assignments. Learners can obtain CEUs via post-module questions that have been provided. This introduction provides the objectives for Module 3 and suggested resources and references.

Learning Objectives:

After completing this course you will be able to:

1. Describe and apply contemporary leadership theories, principles, and values that are relevant to higher education and physical therapy education.
2. Identify, explain, and implement management strategies that are grounded in leadership principles, institutional strategic planning documents, and knowledge of the environment of higher education.
3. Demonstrate leadership behaviors that are authentic, grounded in institutional and professional values, and achieve the intended results.
4. Justify/explain decisions and actions to others based on an understanding of the academic administrator's responsibilities, a sense of duty to represent faculty and students, and alignment congruent with institutional values, priorities and directives.
5. Apply proven negotiation/conflict resolution methods and time management techniques to daily administrative challenges.

Agenda:

Topic	Minutes
Required readings (listing found in resources):	1200
Introduction and Overview:	15
Section 1:	35
Section 2:	25
Section 3:	45
Section 4:	30
Section 5:	50
Posttest:	60
Journaling Assignments	240
Discussion Forum Postings	120
Activities/Reflective exercises	320
	Total Minutes = 2140
	Minutes divided by 60 = 3.5666
	Total = 3.6 CEUs

Module 3 Posttest:

1. The budget situation for the coming year is grim. There will be at least a 3% reduction in available new funds. The decisions being made consider several days of leave without pay for the faculty, reduction in workforce, and reduction in faculty support. The leadership is asking for faculty input. You give thoughtful consideration to each response. You must include consideration of: (Module 3/Objective 1)
 - a) **The characteristics of the leader, behaviors of the followers, and the situation**
 - b) Your personal circumstance of needing a raise
 - c) The staff and their feelings
 - d) The plan for next year

2. Leadership styles can be effective in many cultures (business, health care, academics, etc.) and are driven by personality and group practices. (Module 3/Objective 1)
 - a) **True ***
 - b) False

3. In the Kouzes and Posner model of leadership, a leader must model the way, share a vision, and challenge the current processes to enable others to act. They must forge agreement by: (Module 3/Objective 1)
 - a) Identifying the followers
 - b) **Identifying common principles and ideals**
 - c) Personalizing all decisions
 - d) Getting followers to respect them

4. The most important attribute of a leader is that he/she: (Module 3/Objective 1)
 - a) Is a good manager
 - b) Is able to plan ahead.
 - c) **Is a person of integrity.**
 - d) Has a vision

5. Leadership is: (Module 3/Objective 1)
 - a) **A reciprocal process between leaders and followers.***
 - b) A quality you are born with
 - c) Able to achieve a goal by him/herself
 - d) An ability to establish a quorum at meetings

6. Leadership is an important role requirement for managers, but managerial work is different. (Module 3/Objective 2)
 - a) **True**
 - b) False

7. A good manager, in contrast to a good leader, must: (Module 3/Objective 2)
 - a) share a vision
 - b) empower others
 - c) be accountable
 - d) **be time efficient**

8. Both leaders and managers are problem solvers and decision makers. (Module 3/Objective 2)
 - a) **True**
 - b) False

9. Leaders who are effective should address the culture when trying to create change. (Module 3/Objective 2)
 - a) **True**

b) False

10. In terms of achieving goals, leaders are more important than managers. (Module 3/Objective 2)

- a) True
- b) False**

11. Trust has been eroded as evidenced by the many examples of big business (car industry, banks, etc) failing to use and implement good policies and business plans. This is a good example of the lack of: (Module 3/Objective 3)

- a) Self-reliance
- b) Relational trust
- c) Societal trust**
- d) Consistency

12. Some leaders lose credibility because they are not teaching or practicing their discipline. This demonstration of competence is required to develop trust. (Module 3/Objective 3)

- a) True**
- b) False

13. Ethical leadership is a major societal concern in 2011. (Module 3/Objective 3)

- a) True**
- b) False

14. You have been asked to lead a study of the departmental teaching programs. The main issue is whether to consider developing a doctoral degree program. You accept with hesitation. You have more enthusiasm and become committed as time progresses. Things that may help you broach this task: (Module 3/Objective 3)

- a) You gain confidence in your ability to handle the task (self-trust).**
- b) You probably will delegate much of the responsibility.
- c) Your assistant is very competent in scheduling meetings.
- d) There are committed faculty who will help you.

15. Consistent behavior is the key principle in establishing relationship trust. (Module 3/Objective 3)

- a) True**
- b) False

16. Your new department chair requests progress reports from faculty two times a year. You think your annual evaluation should suffice. With your new knowledge of leadership, why might the chair have a legitimate request? (Module 3/Objective 4)

- a) Administrators have an obligation to monitor the institutional environment including its workforce.**
- b) b) There are faculty who need to be fired.
- c) c) Administrators must be aware of the amount of work being accomplished.
- d) It is busy work.

17. You want to develop a new course and you are excited about it. Your department leader has expressed hesitation about increasing teaching responsibilities. To complicate your life, there is another institution in the immediate area that is starting a new degree program that duplicates yours. You will want to approach your department leader and: (Module 3/Objective 4)

- a) Discuss the economic environment of your department
 - b) Share the new curriculum
 - c) Explore the priorities of the leader**
 - d) Get guidance on how to recruit students to your course
18. You have a new chair of your department. In preparation for her first faculty meeting, she requests that each of the faculty review the strategic plan dated 2009. What is your response? How might you assist her in establishing her own vision for the department? (Module 3/Objective 4)
- a) A strong strategic plan can weather a major change in resources and in the economy, so you go along with her request.
 - b) You e-mail her and let her know the plan is outdated and won't work in the current environment.
 - c) You offer assistance in reviewing the old document and with establishing her vision.**
 - d) You skip the faculty meeting.
19. Who in the academic hierarchy serves as the advocate for the department's interests? (Module 3/Objective 4)
- a) The degree program
 - b) The students
 - c) The administrator**
 - d) The research programs
20. The well-regarded dean of the college has announced his retirement. A search committee is being formed to identify candidates for further consideration by the university's trustees. They will make the final decisions. You are concerned because: (Module 3/Objective 4)
- a) You will have no vote.
 - b) A change in leadership can change the vision for the institution.**
 - c) You don't get to serve on the committee.
 - d) Change makes you nervous.
21. You need to confront a colleague about space. Your department has assigned space based on grant support, and you need just a little space to run several experiments before applying for funding. You know you are awkward in these sorts of situations. What should you do? (Module 3/Objective 5)
- a) You need to practice the negotiation with an uninvolved friend.**
 - b) Trust your ability to overcome being tongue-tied.
 - c) Talk to your colleague's graduate student and see if space is available.
 - d) Request the space directly from your chair.
22. One of your colleagues is funded by a grant supported by the institution and is leaving the campus to pursue other interests. Your chair is searching for the right person to take over the leadership of the grant and be the primary investigator. You want to help out, but you are overly busy even without the grant. What should you do? (Module 3/Objective 5)
- a) Consider whether the grant would advance your career.
 - b) Conduct a personal time management study to see if there actually would be time to do the job well.**
 - c) Figure out how many meetings you would need.
 - d) Just volunteer – things will work out.
23. You are in conflict with one of your colleagues. It is a very competitive atmosphere and yet you wish to accommodate some of the concerns of your colleague. How might you do that? (Module 3/Objective 5)
- a) Use the Thomas-Kilmann Conflict Resolution style to compromise.**
 - b) Continue competing at a high level.

- c) Write a letter to your colleague stating your goals.
 - d) Enlist the aid of a more powerful person.
24. You are entering a negotiation to see which of 2 investigators (you or your colleague) will be listed first on an important publication. Before going into the negotiation, you establish the parameters by which you will accept being second author. This is an example of: (Module 3/Objective 5)
- a) Meeting your colleague half-way
 - b) Being foolish – you know you should be first author
 - c) Negotiating with integrity
 - d) **Identifying the problem in Quadrant I and being realistic about worst case scenarios.**
25. A meeting is scheduled for 4:00 to 4:45 pm this afternoon. How might you assist the chair of the meeting in making this one efficient? (Module 3/Objective 5)
- a) **Request an agenda for the meeting, and ask who will be attending and the purpose of the meeting.**
 - b) Prepare yourself by reading the minutes from the last meeting.
 - c) Insist that the meeting be longer for full discussion.
 - d) Request that the meeting be delayed until after 5:00 pm so attendance might improve.

Course Title: ELI: Module 4: Student Affairs

Category: Online

CEUs: 3.1 CEUs/ 31 contact hours/CCUs (including assessment)

Level of Audience: Basic to Intermediate

Description:

This module has been developed with the question “What should an academic leader know about the many roles, responsibilities, and activities of Student Affairs and how Student Affairs supports the institution’s mission?” in mind.

Colleges and universities may structure their Student Affairs divisions differently, but the same primary responsibilities must still be met. This module is not intended to make you a Student Affairs professional, but it will address major issues and concepts about which a dean must be knowledgeable in his or her role.

This familiarity will enable you to make well-informed decisions, provide vision for the college or division, and support students. It is expected that you will approach this module using the new perspectives and information gleaned from the prior modules in the ELI Fellowship.

Learning Objectives:

After completing this course you will be able to:

1. Examine typical Student Affairs activities, relationships formed within the academic environment, and the overall contribution of Student Affairs to a holistic educational experience.
2. Evaluate the concepts and components of a strategic enrollment management (SEM) process that is defensible and congruent with the institution and program missions.
3. Explain the purpose of different Student Affairs functions in relation to SEM, as well as institutional leader and faculty interactions with these functions.
4. Identify and use the resources and procedures needed to help manage a wide variety of student needs and issues including, but not limited to, student academic progress, reasonable accommodations, students in crisis, and inappropriate or unprofessional behaviors.
5. Discuss federal regulations and considerations in establishing standards, policies, and procedures related to student admissions, enrollment, conduct, and progress.

Course Agenda:

Required readings (listing found in resources):	1000 minutes
Introduction and Overview:	35 minutes
Section 1:	45 minutes
Section 2:	50 minutes
Section 3:	55 minutes
Section 4:	60 minutes
Section 5:	55 minutes
Conclusion:	5 minutes
Posttest:	60 minutes
Journaling Assignments	100 minutes
Discussion Forum Postings	180 minutes
Activities/Reflective exercises/Pre-Test	240 minutes
Total Minutes =	1885 minutes
Total minutes/60 =	31.41
Total CEUs =	3.1 CEUs

Module 4 Posttest:

1. The student handbook may be considered a contract with a student unless it includes a disclaimer stating otherwise. **T**
2. FERPA allows academic advisors access to a student's educational record if the advisors are included in the institution's definition of having a legitimate educational interest. **T**
3. A statement indicating a person's ability to meet the program's essential functions with or without accommodations should be part of the admissions application. **T**
4. Because of limitations of FERPA, a faculty or staff member cannot report concerns about a student to the institution's counselor. **F**
5. An institution may rescind an offer of admission if it later wants to accept a student with higher academic qualifications. **F**
6. If a student submits documentation of a disability and requests accommodations, the institution must provide those accommodations. **F**
7. Disciplinary dismissal situations should be afforded a higher level of due process than academic dismissals. **T**
8. Student newspaper articles that are critical of school authorities or that are controversial may not be censored by institutional authorities. **T**
9. Students cannot be dismissed without a formal hearing when their performance fails to meet scholastic standards. **F**
10. Institutional policies should allow students to challenge grades and other academic evaluations. **T**
11. A faculty member is authorized to discuss a student's course grade with a parent if the student is claimed as an exemption on the parent's tax return. **F**
12. The "academic record" is synonymous with the "educational record" of a student. **F**
13. Implementing financial aid award policies to meet enrollment goals is acceptable as long as it is not done in a discriminatory manner. **T**
14. Although a faculty member may recognize a student is in "crisis" mode, the faculty is prohibited by law from contacting authorities as the student can then pursue legal action against the institution. **F**

Multiple Choice

15. A criminal background check should be conducted as part of the admission process:
 - A. With the initial admissions application
 - B. After the offer of acceptance is made**
 - C. Prior to an interview
 - D. Never with admissions – after matriculation
16. In what process are all members of the institution expected to contribute to meet institutional mission and goals?
 - A. Capital campaigns
 - B. Student assessment
 - C. Admissions and recruitment
 - D. Strategic enrollment management**
17. Which response below is not a purpose of research in SEM?
 - A. To improve retention
 - B. To increase funding for student government**
 - C. To build a model for enrollment projections
 - D. To recommend changes to financial aid award policies
18. Which of the following items is not considered part of the educational record for a student:
 - A. A counselor's notes on a session with a student**
 - B. Disability accommodations for a student
 - C. Test scores a student earned in class
 - D. Academic dismissal records
19. This tool uses the characteristics of students who have chosen an institution in the past to predict which prospective students will enroll in the future:
 - A. SEM
 - B. Predictive modeling**
 - C. Recruitment and marketing
 - D. Merit scholarships
20. "Price elasticity" in SEM refers to:
 - A. Tuition discounts

- B. Comparison with other “like” institutions and their tuition figures
 - C. What the market will bear**
 - D. Increasing net revenue
21. The model for academic advising where professional or faculty advisors are located in their respective academic departments is:
- A. A shared model
 - B. A decentralized model**
 - C. A centralized model
 - D. A two-tiered model

Course Title: ELI: Module 5 - Legal and Policy Issues
Category: Online
CEUs: 4.4 CEUs/44 contact hours/CCUs (with posttest)
Level of Audience: Intermediate

Description:

A comic strip character told his boss that to follow through on the task he was given might result in his being executed for treason, whereupon the boss said for him to talk to the legal department. After a brief reflection on that direction, the employee asked the boss if he could opt for the execution instead.

Having to wrestle with legal issues need not be that daunting. Module 5 is not designed, nor will it make any attempt be made, to provide definitive answers to specific legal issues or problems. That is essentially the domain of the legal counsel and ultimately the courts. What Module 5 will attempt, using a case study approach, is to provide some examples of legal issues related to day-to-day academic decision making so that you might be better able to recognize the existence of a legal problem, analytically think through a situation, and seek the necessary assistance and guidance.

Learning Objectives:

After completing this course you will be able to:

1. Describe the general precepts for the documentation of controversial matters (Section 1).
2. Recall the principles and concepts underlying risk management practices as well as the risk management processes and procedures for your institution (Section 2).
3. Identify and describe the necessary components of an affiliation agreement, using a provided sample agreement (Section 3).
4. Summarize and apply your institution's grievance policies and procedures (Section 4).
5. Describe and analyze the limits that can, and in some instances must, be placed on religious activity by students and faculty related to their academic activity (Section 5).
- 6a. Evaluate the expanse and limits of the principles of academic freedom as they apply to faculties' performance of their duties and students' academic performance (Section 6).
- 6b. Describe and assess the institution's authority to make determinations about the manner in which it operates and the content and conduct of its academic programs (Section 6).
- 6c. Explain to students and faculty the scope of their respective academic freedom, including its limitations (Section 6).
- 7a. Assess the extent of the rights of and limits on students' freedom of speech (Section 7).
- 7b. Examine the rights and limits on faculties' (employees') freedom of speech in their roles as employees and in their personal lives (Section 7).
- 7c. Determine what constitutes hate speech and recall the sanctions available when such speech is used by students or faculty (Section 7).
- 7d. Know the need for immediate and comprehensive action when faced with a situation involving hate speech (Section 7).
8. Recognize the situations in which you need to consult with your immediate administrative supervisor to request a consultation with the institution's legal counsel (Section 8).
- 9a. Analyze the nature, extent, and limits of your institution's indemnification of its employees and students engaged in clinical training (Section 9).
- 9b. Explain the limited circumstances under which you may have exposure to personal liability (Section 9).

Course Agenda:

Topic	Minutes
Required readings (listing found in resources):	1501
Introduction and Overview:	30
Section 1:	30
Section 2:	30
Section 3:	30
Section 4:	30

Section 5:	30
Section 6:	60
Section 7:	60
Section 8:	60
Section 9:	60
Posttest:	60
Journaling Assignments	120
Discussion Forum Postings	110
Activities/Reflective exercises/Pre-Test	450
	Total Minutes = 2661
	Total minutes/60 = 44.35
	Total CEUs = 4.4

Brief Speaker Bio:

Steve Milam, JD

For over 30 years, Steve Milam served as an assistant attorney general for several Washington state public institutions of higher education, the last 23 years of which were at the University of Washington. He was a senior counsel and assistant attorney general for the University of Washington Health Sciences and Medical Centers. His clients included the University of Washington Schools of Dentistry, Medicine (including the Division of Physical Therapy), Nursing, Pharmacy, Public Health and Community Medicine, and Social Work, as well as Harborview Medical Center and University of Washington Medical Center and Airlift Northwest.

Currently, Milam is an affiliate assistant professor in the Department of Bioethics and Humanities for the University of Washington School of Medicine and is in private practice as an attorney and consultant on issues related to higher education and health law. Milam is an adjunct professor teaching Higher Education Law, for the Student Development Administration Program at Seattle University College of Education. He is also a part-time lecturer teaching the End-of-Life seminar for the University of Washington School of Law.

Milam is a graduate of Washington State University and obtained his legal education at the University of Oregon. He is a past president of the Washington State Society of Healthcare Attorneys and a past member of the Board of Directors of the National Association of College and University Attorneys.

Milam has made presentations throughout the United States on a variety of medical, legal, and education topics during his career, including to audiences of physical therapy educators. His articles on legal issues related to the evaluation of student clinical performance and academic dismissal have been published in the New England Journal of Medicine, Academic Medicine, Journal of College and University Law, Journal of Law and Ethics in Dentistry, and Perspective on Physician Assistant Education (former title of the Journal of Physician Assistant Education).

Course Content/Outline:

Section 1 – Controversy Documentation: E-mail, Voicemail, and Disclosure Issues

- ✓ Research Activity: Identify and Review Document Retention Policies (slides 5 and 6)
- ✓ Journaling Activity: Case 1 Next Steps (slide 10)
- ✓ Activity: Reflecting on Communication Best Practices (slide 12)
- ✓ Research Activity: Requests for Records (slide 17)
- ✓ Research Activity: Assignments (slide 19)

Section 2 – Risk Management

- ✓ Research Activity: Review Risk Management Policies and Incident Forms (slides 5 and 6)
- ✓ Activity: Case 2 Reflection (slide 8)
- ✓ Journaling Activity: Considering Other Related Issues (slide 15)

- ✓ Journaling Activity: Write a Letter to Fred (slide 25)
- ✓ Journaling Activity: Write a Letter to Thelma (slide 30)
- ✓ Journaling Activity: Responding to the Case of Doyle, the Outspoken Student (slides 31-33)
- ✓ *Discussion Forum: Determining Who Is the Disruptor (slides 66 and 67)*

Section 8 – Working With Institutional Legal Counsel

- ✓ Research Activity: Review Definitions and Policies Related to Legal Counsel (slides 10 and 11)
- ✓ Activity: Preparing for a Meeting With Your Legal Counsel (slide 22)
- ✓ Activity: Create a Notebook (slide 33)
- ✓ Research Activity: Review Policies and Procedures and Meet With Your Legal Counsel (slide 38-39)

Section 9 – Liability of Employees, Faculty, and Administrators

- ✓ Research Activity: Review Liability- and Indemnification-Related Policy (slide 6)
- ✓ Activity: Reflecting on Case 18 (slide 14)
- ✓ *Discussion Forum: Discuss the Theft of John's Computer (slide 20)*
- ✓ Research Activity: Applying the Rules (slide 27)
- ✓ Stop and Think: Negligent Supervision (slide 37)
- ✓ Activity: Liability Examples (slide 41)

References:

1. Cheryl A. Cameron, Laura E. Meyers & Steve G. Olswang, Academic Bill of Rights: Conflict in the Classroom, 31 *Journal of College and University Law* 243 (2005).
2. Kaplin WA, Lee BA. *The Law of Higher Education. Student version, 4th Edition.* [e-book] Hoboken, NJ: Jossey-Bass; 2010.
3. Kaplin WA, Lee BA. *The Supplement to A Legal Guide for Student Affairs Professionals. 2nd Edition.* [e-book] Hoboken, NJ: Jossey-Bass; 2011.
4. Kaplin WA, Lee BA. *The Law of Higher Education. 2 volumes, 4th Edition.* Hoboken, NJ: Jossey-Bass; 2006.
5. Kaplin WA, Lee BA. *The Supplement to A Legal Guide for Student Affairs Professionals. 2nd Edition.* Hoboken, NJ: Jossey-Bass; 2011.

Course Title: ELI: Module 6 – Human Resources Management

Category: Online

CEUs: 3.9 CEUs/39 contact hours/CCUs (with posttest)

Level of Audience: Intermediate

Description:

This module will also examine the employment cycle, including the highly competitive recruiting market for faculty; total compensation and rewards; faculty and staff relations, including workload matters, tenure, institutional governance, and collegiality; changing demographics; health and productivity management; the legal and compliance aspects of human resources management; and, related policies and procedures.

This course will show you, an academic leader, the profession and function of higher-education human resources; what differentiates higher-education human resources from private practice human resources; and, how to effectively partner with your chief human resources officer and her or his team.

Learning Objectives:

After completing this course you will be able to:

1. Explain the evolution of the profession of human resources and how that evolution has affected higher education in the United States. (Section 1)
2. Evaluate the components of the talent management processes for faculty and staff in a higher-education environment, and evaluate the efficacy of the faculty and staff promotion process. (Section 2)
3. Recall the definition of total compensation and create a total compensation flow chart for your institution. (Section 3)
4. List and describe the features of effective employee relations strategies, programs, and initiatives for faculty and staff; and repeat and recall the various issues associated with workload matters, tenure, institutional governance, and collegiality. You will also be able to discuss matters related to unions and union relations.. (Section 4)
5. Describe the various factors that influence a multigenerational workplace. You will be able to recall the effects these factors have on human resources programming. You will also be introduced to the changing demographics of the professorate, the future supply shortage within the academic leadership pipeline, and managerial steps that can positively impact it. (Section 5)
6. Evaluate the elements of effective health and productivity measures – measures that reach beyond traditional medical and fringe benefits packages. These will include wellness-related components as well as work-life practices. (Section 6)
7. Deeper appreciation for the major employment-related case laws and legislation that impact the higher education environment. (Section 7)
8. Evaluate the various structural features and aspects of a college or university strategic plan, including organization development, workforce development, succession planning, diversity programming, and workforce planning programs. (Section 8)
9. Recall and articulate the policies and procedures necessary to partner effectively with your human resources office. (Section 9)

Course Agenda:

Section	Minutes
Introduction and Overview	20
Section 1 - History and Evolution of Higher-Education Human Resources Management	25
Section 2 – Talent Management Process	40
Section 3 – Total Compensation Concepts	35
Section 4 – Employee Relations Practices	40
Section 5 – Changing Demographics in the Education Workforce	25
Section 6 – Health and Productivity Management	35
Section 7– Legal and Compliance Issues	35
Section 8 – Strategic Planning	30
Section 9 – Policies and Procedures for Human Resources Officers	30

Summary and Closing	10
Journaling Assignments	150
Discussion forum Postings & Virtual Office Hours	150
Required Reading	1631
Posttest	60
	Total Minutes = 2316
	Minutes divided by 60 = 38.6
	Total = 3.9 CEUs/39 contact hours

Brief Speaker Bio:

James E. Kemper, PhD is the director of human resources at Zane State College in Zanesville, Ohio. Prior to joining Zane State, Kemper was the director of human resources for Longaberger Inc and director of organization and human resource consulting for The Ohio State University. He also was associate vice president and chief human resources officer at Ohio University for over 20 years. Kemper also has worked for the Anchor Hocking Corporation and as an independent consultant. He has held adjunct teaching roles for Ohio University's College of Business Administration and for Hocking College.

Dr Kemper has bachelor and master degrees in business administration from Ohio University and an SPHR lifetime certification from the Human Resource Certification Institute in Washington D.C. He received his PhD in higher education administration from Ohio University in 2001. His dissertation, which has been replicated twice, was titled "The Role of the Human Resource Office in the Collegiate Environment: Identifying the Components of Being a Strategic Partner."

He has published numerous human resources-related articles in trade journals including The Higher Education Workplace, The Business Officer, and Capacity.

Kemper is a member of The Society for Human Resource Management (SHRM) and the College and University Professional Association for Human Resources (CUPA-HR).

He and his wife, Jenny, have 4 grown children and 9 young grandchildren.

Course outline:***Section 1 – History and Evolution of Higher-Education Human Resources Management***

- ✓ Research Activity: Applied History (slide 3)
- ✓ Stop and Think: Personnel Administration Course (slide 6)
- ✓ Stop and Think: Evolution of Human Resources (slide 11)

Section 2 – Talent Management Process

- ✓ Research Activity: Talent Management (slide 3)
- ✓ Research and Journaling Activity: Talent Management Process at Your Institution (slide 4)
- ✓ Stop and Think: Recruiting (slide 9)
- ✓ Stop and Think: Staffing and Recruiting (slide 11)
- ✓ Journaling Activity: Talent Management Processes (slide 19)

Section 3 – Total Compensation Concepts

- ✓ Interview Activity: Total Compensation (slide 3)
- ✓ Research and Journaling Activity: Total Compensation (slide 5)
- ✓ Stop and Think: Total Compensation (slide 11)
- ✓ Stop and Think: Extrinsic and Intrinsic Rewards (slide 15)

Section 4 – Employee Relations Practices

- ✓ Required Activity: Employee Relations (slide 5)
- ✓ Stop and Think: Employee Relations at Your Institution (slide 7)
- ✓ Stop and Think: Communication Programs (slide 10)
- ✓ Stop and Think: Participatory Management (slide 12)
- ✓ Stop and Think: Tenure (slide 17)

Section 5 – Changing Demographics in the Education Workforce

- Stop and Think: Demographic Changes (slides 8 - 9)
- Journal Activity: Collect Demographic Data (slide 10)

Section 6 – Health and Productivity Management

- ✓ Stop and Think: Performance Management (slide 4)
- ✓ Stop and Think: Health Management/Wellness (slide 6)
- ✓ Research and Journaling Activity: Health Management at Your Institution (slide 7)
- ✓ Stop and Think: Defining Productivity Management (slide 8)
- ✓ Stop and Think: Culturally Appropriate Evaluation (slide 11)
- ✓ Stop and Think: Your Productivity Management (slide 13)
- ✓ Research and Journaling Activity: Productivity Management at Your Institution (slide 14)

Section 7– Legal and Compliance Issues

- ✓ Stop and Think: Legal Issues (slide 5)
- ✓ Stop and Think: Legal Issues (slide 7)
- ✓ Stop and Think: Legal Issues (slide 9)
- ✓ Stop and Think: Compliance (slide 13)
- ✓ Research and Journaling Activity: Legal and Compliance Issues (slide 14)

Section 8 – Strategic Planning

- ✓ Required Reading: Reflection and Journaling (slide 4)
- ✓ Required Reading: Reflection and Diversity (slide 5)
- ✓ Required Reading: Reflection, Journaling, and Workforce (slide 6)
- ✓ Research Activity: Your Institution’s Plan (slide 9)
- ✓ Research Activity: Applying the Diagnostic Tool (slide 10)
- ✓ Stop and Think: The HR Strategic Plan (slide 14)

Section 9 – Policies and Procedures for Human Resources Officers

- ✓ Required Activities: Information Search, Reading, and Journaling (slides 3 and 4)
- ✓ Journaling Activity: Policies and Procedures (slide 5)
- ✓ Stop and Think: Comparing Policies and Practices (slide 6)
- ✓ Stop and Think: Policies (slide 12)
- ✓ Discussion Forum: Questions (slide 13)
 - In what ways do members of the Human Resources staff partner with your office?
 - How is the office of Human Resources at your institution considered a strategic partner?
 - What would you say are the 1-to-3 salient issues that Human Resources at your institution need to address over the coming year? Why?

Module 6 Posttest:TRUE/FALSE

1. The evolution of HRM has followed the history of business in the U.S. T/1 (answer/section)
2. The first known college course in personnel administration was taught in 1920 by Ordway Tead at Columbia University. T/1
3. A talent management plan includes provisions or processes for determining who to move into an organization through recruitment. T/2
4. The ultimate goal of an effectively designed total compensation plan is to attract, retain, and motivate top quality faculty and staff. T/3
5. The direct compensation of a total compensation plan includes medical insurance. F/3
6. Employee relations involve the provisions of fair and consistent treatment to all faculty and staff so they will be committed to the organizations goals. T/4
7. An effective employee relations program is marked by common elements or similar ingredients. The notion of an effective communications strategy is NOT included in the program. F/4
8. Unions now represent about one-quarter of all full-time faculty in U.S. colleges and universities. T/4
9. Productivity, or performance management, is the formal, systematic assessment, identification, and measurement of how well faculty and staff are performing in their official capacities in relation to established standards. The process also includes the communication of that assessment to the individuals. T/6
10. According to a 2008 ACE study, permanent junior faculty make up a diminishing share of the professorate, and most of these individuals will not have time to earn tenure (at 4-year institutions and some community colleges). T/5
11. The ACE study noted in number 10 above further recommends there is no need to alter the higher education leadership pipeline to adapt to current demographic realities. F/5
12. Policies help the college or university in being defensible against certain legal actions. T/9
13. According to Rothwell, Prescott, and Taylor, "Strategy is usually defined as the long-term course plotted for an organization." T/8

MULTIPLE CHOICE

14. During which academic year was the College & University Personnel Association (now known as the College & University Professional Association for Human Resources) formed:
 - a. 1919/20
 - b. 1930/31
 - c. **1946/47 (C)/1**
 - d. 2011/12
15. The 4 cultures of the academy, as described by Bergquist (1992) are: collegial, managerial, developmental, and:
 - a. **Negotiating (A)/1**
 - b. Militaristic
 - c. Paternalistic
 - d. Silly nonsense!

16. Recruitment is the process of:
- Determining who to exit from the organization
 - Generating a pool of qualified candidates (B)/2**
 - Finding faculty only
 - Progressive discipline
17. The Civil Rights Act of 1964, including Title VII, directly affects all campuses. It prohibits employment and membership discrimination based on race, color, religion, sex, and:
- Social status
 - Economic income
 - National origin (C)/7**
 - Region of the country where born
18. The Age Discrimination in Employment Act prohibits employment-related discrimination against individuals aged _____ to 65.
- 30
 - 40 (B)/7**
 - 45
 - 50.
19. Productivity management can take on many complex and complicated forms. Which of the following is NOT 1 of these forms?
- Management by objectives
 - 360-degree
 - Culture contracts (C)/6**
 - Behaviorally anchored rating scale
20. Policies normally are developed for the following purposes:
- Satisfy legislative and other mandates
 - Establish workplace expectations
 - Communicate effectively
 - Encourage efficiency
 - Encourage consistency
 - All of the above (F)/9**

Course Title: ELI: Module 7 – Resources/Financial Management

Category: Online

CEUs: 3.1 CEUs/31 contact hours/CCUs (including assessment)

Level of Audience: Intermediate

Description:

This module addresses the question “What should academic leaders know about financial management to allow them to be active participants in decisions related to resource allocation?”

At the conclusion of the module you will have a clearer picture of the relationship of your unit to the institution. Unit leaders do not live in isolation. Successful department chairs or division chiefs are able to place themselves outside their immediate world.

You will also explore how decisions at the institution level can impact individual programs. Being aware of and able to communicate with your leadership will advance your unit’s goals through alignment with the overall institutional mission and goals.

Learning Objectives:

After completing this course you will be able to:

1. Describe the stream of revenues and expenditures in higher education and how they are managed.
2. Describe the purpose, organization, and content of the various reports that communicate the financial condition of your institution and discuss how these documents are impacted by changing financial scenarios.
3. Describe some of the common tools available to monitor the financial condition of an institution of higher education.
4. Explain the key principles of endowment management, be able to identify the fundamental components of a successful fundraising program, and discuss the link between these 2 activities.
5. Explain how to find grant opportunities for your program and the resources available to assist pre-award and post-award.

Course Agenda:

Section	Minutes
Introduction and Overview	15
Section 1 - Resource Management	80
Section 2 – Financial Statements	120
Section 3 – Tools for Assessing Financial Health	70
Section 4 – Endowment Management and Fund Raising	120
Summary and Closing	10
Journaling Assignments, Research Activities, Stop & Think	220
Discussion forum Postings & Virtual Office Hours	200
Required Reading	1000
Assessment	30
	Total = 1865
	Minutes divided by 60 = 31.08
	Total CEUs = 3.1

Module 7 Posttest Assessment:

1. Variance analysis explains why actual costs are different, either from budgeted values or from prior period actual values.
 - a. **True**
 - b. False

2. What expenditures respond to immediate cost reduction when budgetary variances need to be addressed?
 - a. Fixed
 - b. **Variable**
 - c. Mixed
 - d. All of the above

3. The institution is facing a significant revenue shortfall, and you have been asked to identify unprofitable programs to eliminate. This approach to addressing variances is:
 - a. Strategic
 - b. Performance based
 - c. Formula based
 - d. **a and b**
 - e. All of the above

4. Indirect cost recovery and federal aid for scholarships are:
 - a. Expenditures
 - b. **Revenues**
 - c. Liabilities
 - d. All of the above

5. Decreasing expenses has a more predictable impact on financial health than increasing revenues.
 - a. **True**
 - b. False

6. Some numbers on the income statement and balance sheet are estimates. This approach to accounting is:
 - a. Cash
 - b. **Accrual**

7. Equity equals total assets minus total liabilities. An increase in accounts receivable:
 - a. Increases cash inflow
 - b. **Decreases liabilities**
 - c. Decreases cash inflow
 - d. Has no impact on cash flow

8. An increase in accounts receivable impacts the:
 - a. Income Statement
 - b. Balance Sheet
 - c. Cash Flow Statement
 - d. Cash Flow Statement and Balance Sheet
 - e. **All of the above**

9. Accounts Payable is an asset.
 - a. True
 - b. **False**

10. An increase in Accounts Payable:
 - a. Increases assets
 - b. **Decreases equity**

- c. Increases equity
 - d. None of the above
11. In accrual accounting, revenue is recorded when earned, and expenses recorded when paid.
- a. True
 - b. False**
12. When determining financial health using ratios, a consideration is that financial statements reflect the past, not the future
- a. True**
 - b. False
13. The Primary Reserve Ratio measures the liquidity of an institution.
- a. True**
 - b. False
14. The Primary Reserve Ratio can be improved by an increase in:
- a. Revenue**
 - b. Long-term Debt
 - c. Fundraising expense
 - d. Collateral
15. A Return on Net Assets Ratio can be impacted by results of fundraising.
- a. True**
 - b. False
16. Improvements year-to-year in the calculation of an institution's Net Income Ratio and/or Net Operating Revenues Ratio guarantees improved composite scores.
- a. True
 - b. False**
17. Endowment spending policies promise increased income for operations year over year.
- a. True
 - b. False**
18. Solicitation is most effectively conducted by professional fundraising staff.
- a. True
 - b. False**
19. A case statement should be interchangeable to increase efficiency of fundraising activities.
- a. True
 - b. False**
20. Funds accounting is essential for:
- a. Accurate reporting of restricted and unrestricted expenditures
 - b. Stewardship
 - c. Calculation of ratios
 - d. None of the above
 - e. All of the above**

Course Title: ELI: Module 8 - Program Development and Assessment

Category: Online

CEUs: 3.3 CEUs/33 contact hours/CCUs (including posttest)

Level of Audience: Intermediate

Description:

Module 8 introduces important skills in designing and assessing programs that will facilitate student learning and its improvement within the context of institutional and program missions. This module focuses upon student learning and development and emphasizes the role of learning in determining program design and program efficacy. In that respect, the emphasis may differ somewhat from more traditional approaches to program design and evaluation, which tend to rely more heavily upon inferential indicators of quality.

Module 8 helps you look at your program in the context of the learning it intends to provide and the learning it actually produces. Thus it places fairly heavy emphasis on articulating that intended learning clearly and examining its achievement consistently.

Learning Objectives:

After completing this course you will be able to:

1. Evaluate different models of curriculum design in the context of institutional and programmatic missions and realities.
2. Use an outcomes-based approach to curriculum design and assessment.
3. Develop a comprehensive program evaluation plan, including benchmarks consistent with your program and institution vision and mission.
4. Design a comprehensive program evaluation process.
5. Evaluate the efficacy of your current program evaluation process.

Course Agenda:

Section	Minutes
Introduction and Overview	25
Section 1 – Outcome-based Thinking	75
Section 2 – Outcome-based Program Design	75
Section 3 – Outcome-based Assessment	70
Section 4 – Using Evidence From Outcome-based Assessment	70
Section 5 – Using Outcome-based Assessment in Program Evaluation	60
Summary and Closing	15
Discussion forum Postings & Virtual Office Hours	200
Journaling Assignments, Research Activities, Stop & Think	200
Required Readings	1100
Posttest	60
	Total Minutes = 1950
	Total Minutes/60 = 32.5
	Total CEUs = 33

Brief Speaker Bio:

Robert Mundhenk, PhD - Past President - Association for the Assessment of Learning in Higher Education

Robert Mundhenk, PhD, is the past president of the Association for the Assessment of Learning in Higher Education (AALHE), housed at the University of Kentucky. He is also senior scholar at the Higher Learning Commission of the North Central Association of Colleges and Schools; the largest regional accrediting agency in the country, where he has designed and run the commission's programming on the assessment of learning and has just developed an Academy on Student Persistence and Completion. He served as director of assessment for the American Association for Higher Education after teaching English at Fordham University and Northampton Community College for more than 30 years. At the latter institution, he also served as academic vice president for 12 years. In that role, he oversaw a number of health programs and was responsible for their reaccreditation. He received his PhD in English from the University of California at Los Angeles.

Module 8 Posttest:

1. Alignment of learning to institutional mission should occur at the program, course, and section levels. True 1.21
2. Analyzing and using data are essential parts of the assessment process. True 4.6
3. The best way to ensure a good assessment process is to use direct measures exclusively. False 4.21
4. Data from program review and evaluation should never be used in making budgeting requests. False 5.20
5. The data that institutions collect on their programs need to be relevant, meaningful, reasonable, and useful. True 4.8
6. Deciding on what data should be requested and how they should be reported should be conditioned, at least in part, by the degree to which staff can and will engage with it. True 4.12
7. Both descriptive and developmental rubrics have clear criteria and clearly described levels of achievement and so can indicate, at any point at which the rubric is used, the degree to which students are achieving the desired outcome. True 3.14 and 3.21
8. Developing a descriptive rubric can be a very useful device for helping faculty define and prioritize the core outcomes of their programs, as well as the means to assess them, even if they find the idea of structured feedback to students offensive. True 3.24
9. For part-time instructors and clinical supervisors, course materials based on descriptive rubrics can make clear what outcomes need to be developed and what criteria will be used to determine if they are. True 3.27
10. Formative assessments are interim assessments, designed to provide students and faculty meaningful information about student learning in order to improve it. True 4.11
11. Good outcome statements should be mission-driven, aligned at all levels, concrete, performance-based, integrative, and measurable. True 1.19
12. Grading and assessment are essentially the same thing. False 3.4
13. Graduation rates and student satisfaction surveys are indirect indicators of outcome achievement that do not necessarily tell us very much about what outcomes students have mastered. True 4.17 and 4.20
14. Information about student achievement is a much more direct indicator of a program's quality than reputational measures such as faculty degrees or publications, because it focuses the program's success in performance. True 5.17
15. A learner-centered model places increased emphasis on applying knowledge that students see as important and relevant to their career goals instead of what the faculty member sees as important. False 1.9
16. Multiple judges, when properly trained to assess actual student performance using agreed-upon criteria, display a high degree of interrater reliability. True 3.29
17. The number of outcomes in a program should be relatively low so that outcomes can be prioritized and integrated as fully as possible. True 1.26
18. An outcome is the intended result of a learning experience (course, program, clinical experience, internship, etc), articulated in terms of what a student can do with what he or she knows. True 1.14
19. The outcomes of courses and programs should reflect institutional mission and values. True 1.20

20. Outcome-based assessment is essentially a continuous improvement process. True 5.3
21. An outcome-based curriculum map incorporates intended levels of outcome development in its grid. True 2.15
22. Outcome-based data used in program evaluation or review delineate more clearly than any other “quality” indicators the degree to which a program has achieved its intended goals. True 5.15
23. Outcome-based thinking about curriculum and pedagogy emphasizes active learning that uses information. True 1.14
24. Required courses do not have to deal with all program outcomes, but they should all deal with at least 2 outcomes. False 2.26
25. A rubric explains to students the criteria against which their work will be judged. More important for our purposes, it makes public key criteria that students can use in developing, revising, and judging their own work. True 3.9
26. Rubrics are the only way of measuring student performance. False 1.27
27. “Students will understand basic elements of human anatomy” is a good program outcome. False 1.16
28. When a department chooses to use a developmental rubric to assess a core program’s outcomes, faculty teaching all sections of a course in which the rubric will be used must cover the same topics and use the same assignments to ensure that core outcomes are addressed and developed. False 3.23
29. Whenever students are exposed to or practice an outcome, their degree of achievement of that outcome should be measured, though not necessarily graded. True 2.30

Course Title: ELI: Module 9 – Relationships, Influence, and Partnerships

Category: Online

CEUs: 2.6 CEUs/26 contact hours/CCUs (including posttest)

Level of Audience: Intermediate

Description:

Welcome to our last module of the ELI on relationships, influence, and partnerships. This module is designed to provide you with strategies to leverage relationships and partnerships to establish a new program within an academic community. As you know, interpersonal relationships are the foundation upon which programs are built. While we will focus in general on some of the relational skills required to establish a new physical therapy school/program, we will examine specific tools for building healthy, authentic relationships and the proper way to use influence. We will examine potential risks and how to overcome them and will discuss communication from the perspective of listening and asking questions. We will examine criteria for selecting partners to establish a physical therapy school/program. And throughout we will provide you with opportunities to apply your learning to build a living document that will be your “Draft Strategic Plan.” Components of the plan will include a vision statement, networking strategy, technology approach, and contact list.

Learning Objectives:

After completing this course you will be able to:

1. Compare your leadership characteristics with the characteristics of a change agent, identify change agent characteristics that you possess, and determine practical ways to acquire those you do not possess.
2. Identify potential contacts to establish a new physical therapy school within a given academic environment and examine the risk factors associated with this endeavor.
3. Apply the principles for creating a positive public image for your physical therapy school/program by creating a shared vision, using emotional intelligence, and applying a situational leadership approach.
4. Recall the definition and methods for “leading from the middle” and identify practical strategies for applying the technique in your environment.
5. Assess available technologies to determine their appropriateness for your academic environment in the areas of communication and relationship building.

Course Agenda:

Topic	Minutes
Introduction and Overview	15
Section 1 – Being a Change Agent	45
Section 2 – Changing Risks to Opportunities (includes podcasts)	75
Section 3 – Enhancing Visibility (includes podcasts)	60
Section 4 – Leading From the Middle (includes podcasts)	60
Section 5 – Using Technology Effectively (includes podcasts)	60
Section 6 – Summary and Conclusion (includes podcasts)	20
Required Readings	800
Discussion Forum Posting & Virtual Office	150
Journaling Assignments, Take Action, Research Activity	240
Posttest	60
Total Minutes =	1585
Total Minutes/60 =	26.41667
Total CEUs =	2.6 CEUs

Module 9 Posttest:

1. The characteristics of a “change agent” are:
 - a. Tuning in to the environment.
 - b. Challenging the status quo.
 - c. Communicating a compelling vision.
 - d. **All of the above.***

2. The characteristics of a complex system include:
 - a. Being composed of many parts.
 - b. **Exhibiting one or more properties as a whole not obvious from the properties of the individual parts.***
 - c. Having the characteristics of chaos.
 - d. Having complexities beyond normal understanding.

3. Diversity is essential to change because it:
 - a. **Creates the variety required by change.***
 - b. Accentuates the similarities that exist through change.
 - c. Makes chaos visible and underscores the need for adaptation.
 - d. Highlights the difficulty of reconciling differences.

4. Systems thinking requires a leader to be inclusive, positive, forward looking, collaborative, and alert.
 - a. **True***
 - b. False

5. Complex systems relate to leadership in the following way:
 - a. They live in the actual.
 - b. They look at the part instead of the whole.
 - c. They strive for “zero” errors.
 - d. **They accept diversity as essential.***

6. The following components are part of a standard vision statement:
 - a. The organization’s hopes and dreams for the future.
 - b. **Values, philosophies, aims, and objectives.***
 - c. Timelines for implementation of all planned actions.
 - d. Financial goals for the organization.

7. Bolman and Deal emphasize which frame as most relevant to dealing with leadership in an academic community?
 - a. Human resources.
 - b. Structural.
 - c. **Political.***
 - d. Symbolic.

8. Vulnerability is an essential leadership trait for the authentic leader. Its major effect is to:
 - a. Expose the leader’s weaknesses to others in the organization.
 - b. Improve the leader’s ability to manage information.
 - c. Reduce the leader’s authority and control.
 - d. **Improve the leader’s ability to uncover multiple perspectives on an issue.***

9. A leader’s relationships or social connections have increased in importance as a means to:
 - a. **Facilitate the work of the organization.***
 - b. Increase the leader’s visibility.
 - c. Interpret information.
 - d. Manage conflict.

10. The purpose of a SWOT analysis is to:
- Assess internal and external conditions for marketing purposes.
 - Analyze and mitigate risk for strategic planning.***
 - Identify and target individuals and organizations for marketing purposes.
 - Identify internal and external threats for financial planning.
11. Situational leadership is appropriate for creating a shared vision within a diverse group because of the following:
- The follower adjusts to the style of the leader.
 - The leader adjusts to the development levels of the follower.***
 - The leader shares the same values as the follower.
 - The follower must raise his or her competency level before collaborating with the leader.
12. According to Peter Senge, a “shared vision” depends upon intrinsic motivators that uplift individual aspirations and create the spark that lifts organizations out of the ordinary drab existence.
- True***
 - False
13. According to Porter-O’Grady and Malloch, emotional intelligence includes all of the following except:
- The ability to control and suppress emotions.***
 - Social skills.
 - The ability to regulate self.
 - Self-awareness.
14. The starting point for an emotionally competent leader is:
- Good connections and relationships with superiors.
 - The ability to negotiate a beneficial contract.
 - Power to mitigate employee dissatisfaction.
 - Having a healthy view of self.***
15. Dr. Joe Bocchino applies the situational leadership approach when working with faculty by using both of the following:
- Coaching and directing
 - Directing and supporting
 - Supporting and coaching
 - Delegating and supporting***
16. Leading from the middle includes:
- Not seeking the limelight.
 - Being true to self.
 - Having a vision for where the organization should go.
 - All of the above.***
17. Open-ended questions begin with phrases such as:
- Did you ...?
 - Are you going to...?
 - Will you have...?
 - Have you been...?
 - True
 - False***
18. Active listening is a leadership skill that can be defined as:
- Listening with a purpose.

- b. Excluding noise and listening for key words.
 - c. Listening using your mental models.
 - d. Listening for context and content.***
19. The theory of leadership most aligned with leading from the middle is:
- a. Transactional leadership.
 - b. Servant leadership.
 - c. Situational leadership.
 - d. Authentic leadership.***
20. Bloom's taxonomy provides a way to construct thought-provoking questions through the use of words that generate higher-level thinking. The highest level of critical thinking in Bloom's taxonomy is:
- a. Synthesis
 - b. Analysis
 - c. Application
 - d. Evaluation***
21. As Bocchino stated in his podcast, technology can have unexpected outcomes that prod us in new directions, so we should:
- a. Be cautious in the use of a variety of new technologies.
 - b. Avoid being an early adopter of new technologies.
 - c. Tinker with technologies and encourage staff to do the same.***
 - d. All of the above.
22. A listserv is an electronic mailing list that allows a sender to send a single e-mail to everyone in a group, and then concurrently distribute it to all of the addresses of the subscribers; a disadvantage of this technology is:
- a. Wide distribution
 - b. Cost effective
 - c. Easily misused***
 - d. Complexity
23. Generational differences should be taken into account when designing a technology approach, so consider the fact that the generation that is least attracted to technology is:
- a. The Millennials.
 - b. Generation Y.
 - c. Generation X.
 - d. The Baby Boomers***
24. Network etiquette or "netiquette" as a communication approach includes:
- a. Use of abbreviations to shorten messages.
 - b. Forwarding information provided by experts.
 - c. Using your name in the signature line.***
 - d. All of the above.
25. Methods to evaluate the effectiveness and impact of a new technology include:
- a. Calculating Return on Investment.
 - b. Measuring performance outcomes.
 - c. Gathering and evaluating user feedback.
 - d. All of the above.***

Online Course Evaluation



Title: ELI

Directions: We value your feedback! Please complete this optional postcourse evaluation and click "submit" after the last question. After you submit the evaluation, please click the "Next" button in lower right-hand corner to reach the course completion page.

Overall Course & Content

Please note: Questions containing an asterisk "*" require a response in order to submit the survey.

***Content matched written description.**

Strongly Agree Strongly Disagree

***Current evidence was cited for specific content.**

Strongly Agree Strongly Disagree

***There was no promotion of a commercial product.**

Strongly Agree Strongly Disagree

***Authors clearly differentiated content based on personal experience, hypothesis, or research.**

Strongly Agree Strongly Disagree

***Course level was appropriate.**

Strongly Agree Strongly Disagree

***Course met my needs.**

Strongly Agree Strongly Disagree

***The overall quality of this course met my expectations.**

Strongly Agree Strongly Disagree

***I selected this course because of the**

- content
- course author
- cost (economical)
- other

If "other" selected above, please explain:

Demographic Information

***I am an APTA member:**

Yes No

***I am a certified case manager:**

Yes No

***I am a:**

PT
 PTA
 PT Student
 PTA Student
 Other

***Number of years in practice:**

0
 1-5
 6-10
 11-15
 16-20
 21-25
 Over 25

Learning Experience

***I enjoyed learning online.**

Strongly Agree Strongly Disagree

***The presentation was easy to use/navigate.**

Strongly Agree Strongly Disagree

***Content was organized appropriately.**

Strongly Agree Strongly Disagree

***Text was easy to read.**

Strongly Agree Strongly Disagree

***Images enhanced the learning experience.**

Strongly Agree Strongly Disagree

***I am likely to use the Learning Center to take courses in the future.**

Strongly Agree Strongly Disagree

***The course/presentation length was:**

- Just right.
- Too short.
- Too long.

*** How long did it take you to complete this course? _____**

***Instructors provided feedback on my learning YES NO**

*** Objectives were reviewed**

Strongly Agree Strongly Disagree

*** Presenters identified potential conflicts of interest.**

Strongly Agree Strongly Disagree

*** Instructional methods were appropriate for content** (example: general lecture, question & answer, group discussion/activities, multimedia)

Strongly Agree Strongly Disagree

Here is an "open line" to APTA! Please let us know how we can improve our services:

Educational Leadership Institute Online Modules Assessment

Year Graduating from ELI:

Name:

APTA ID#:

Select one:

- Module 1: Personal Leadership and Management
- Module 2: Higher Education, Healthcare Systems, and Society
- Module 3: Institutional Leadership and Management
- Module 4: Student Affairs
- Module 5: Legal and Policy Issues
- Module 6: Human Resources Management
- Module 7: Resources/Financial Management
- Module 8: Program Development and Assessment
- Module 9: Relationships, Influence, and Partnerships

Rating Scale: Strongly Disagree=SD, Disagree=D, Agree=A, Strongly Agree=SA

Orientation to the module prepared me for the Education Leadership Institute by:

	SD	D	A	SA
Using the course technology in the APTA Learning Center.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Accessing the syllabus.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Accessing the assigned readings.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Communicating online with the faculty member.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Understanding the asynchronous communication required among participants.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Identifying the level of reflection required with the module content.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Accessing technology assistance if problems with the module technology arose.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Rating Scale: Strongly Disagree=SD, Disagree=D, Agree=A, Strongly Agree=SA

The online module design:

	SD	D
Facilitated my learning.	<input type="radio"/>	<input type="radio"/>
Was easy to follow.	<input type="radio"/>	<input type="radio"/>
Required use of resources outside my familiar resources.	<input type="radio"/>	<input type="radio"/>
Included links that enhanced my learning.	<input type="radio"/>	<input type="radio"/>
Provided a discussion space for me to discuss openly about the module ("hall talk") with the other participants.	<input type="radio"/>	<input type="radio"/>

Rating Scale: Strongly Disagree=SD, Disagree=D, Agree=A, Strongly Agree=SA

The online module goals and objectives:

	SD	D	A	SA
Established high standards for learning.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Met my learning expectations.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Encouraged independent and in-depth reading on the topic.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Rating Scale: Strongly Disagree=SD, Disagree=D, Agree=A, Strongly Agree=SA

The online module assignments:

	SD	D	A	SA
Facilitated active learning.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Facilitated reflection.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Rating Scale: Strongly Disagree=SD, Disagree=D, Agree=A, Strongly Agree=SA

	SD	D	A	SA
Faculty member was available during virtual office hours and Webinar to answer my questions.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Required me to invest sufficient time with the content to achieve my goals for mastering this topic.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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Educational Leadership Institute Online Modules Assessment

As the participant, what learning activities most influenced your learning in this module?

What content was not included that you would have liked to see more or specific content where you would like greater depth?

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Educational Leadership Institute Onsite Assessment

Name:

Text

APTA ID#:

Text

Session month:

Choose One

Session year: (yyyy)

Text

Rating Scale: Strongly Disagree=SD, Disagree=D, Agree=A, Strongly Agree=SA

FACILITIES:

	SD	D	A	SA
Timely notification of the location of the meeting and meeting room was provided.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Concierge/information services were available.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Access was available to high-speed Internet(wired/wireless).	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Dining facilities were convenient.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Food provided was of acceptable quality.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Quality room was available based on the rate.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Meeting room space was appropriate to meet participant and program needs.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Audio-visual support met the needs of the program.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Transportation costs were reasonable to and from the airport to the hotel.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Information provided about airport transportation was useful.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Rating Scale: Strongly Disagree=SD, Disagree=D, Agree=A, Strongly Agree=SA

GROUNDS/ENVIRONMENT:

	SD	D	A	SA
The facility and surrounding environment were safe.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Rating Scale: Strongly Disagree=SD, Disagree=D, Agree=A, Strongly Agree=SA

PROFESSIONAL PROJECT:

Program work to date prepared me for presenting this phase of my project.

Mentor discussions met my need for continued progression with my project.

SD D A SA

Rating Scale: Strongly Disagree=SD, Disagree=D, Agree=A, Strongly Agree=SA

PROFESSIONAL DEVELOPMENT PROCESS:

I was prepared for specific discussion about my professional development.

Mentors expanded my view of my professional growth beyond what I anticipated.

On-site discussions challenged me in my thinking about professional development.

SD D A SA

Rating Scale: Strongly Disagree=SD, Disagree=D, Agree=A, Strongly Agree=SA

TEACHING/LEARNING PROCESSES:

	SD	D	A	SA
I received timely notification of my on-site responsibilities.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I understood my responsibilities prior to my arrival on-site.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I received timely notification of my mentors' role.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The prior modules' content contributed to quality discussion by others.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The availability of faculty through technology was valuable.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Meeting face-to-face to apply and integrate learned concepts was essential.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other participant's discussions were informative.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The case vignettes applied concepts presented in the ELI modules to real-life situations.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I found the case(s) thought provoking.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I was prepared to apply previous content to case(s).	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The opportunity to discuss and address real life situations within my institution was helpful.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Rating Scale: Strongly Disagree=SD, Disagree=D, Agree=A, Strongly Agree=SA

TEACHING/LEARNING PROCESSES (continued):

	SD	D	A	SA
I receive quality mentorship from mentors between sessions.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I received quality mentorship during onsite session.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

General Comments About the Onsite Session:

Click "Submit Survey" to submit your data. Thank you for your input.

Submit Survey

The ELI Fellowship Program Outcome: Fellow Survey (Post-Graduation)

The mission of the Education Leadership Institute (ELI) Fellowship is to develop innovative and influential leaders in physical therapy (PT and PTA) education who can function within a changing politico-socio-cultural environment. The survey is designed to capture how well the Education Leadership Institute Fellowship has met your needs and has assisted you in developing your skills as an effective leader in the professional and academic environments. Please take a few minutes to answer the following questions:

Name of ELI Fellow:

APTA ID#:

Year of graduation from ELI:

When are you completing this survey?

- 1 year post-graduation
 3 years post-graduation
 5 years post-graduation

The ELI Fellowship has enabled me to assume new leadership roles in academic administration.

- Strongly Disagree Disagree Agree Strongly Agree

Describe your new leadership role(s) in academic administration. Indicate length of time (in months) in each role.

The ELI Fellowship has enabled me to assume new leadership roles at the national, state, and/or local level of the profession.

- Strongly Disagree Disagree Agree Strongly Agree

Describe your new leadership role(s) at the national, state, and/or local level of the profession. Indicate length of time (in months) in each role.

The ELI Fellowship has enabled me to assume new advocacy roles.

- Strongly Disagree Disagree Agree Strongly Agree

Describe your new advocacy role(s). Indicate length of time (in months) in each role.

The ELI Fellowship has enabled me to assume new interprofessional leadership roles.

- Strongly Disagree Disagree Agree Strongly Agree

Describe your new interprofessional leadership role(s). Indicate length of time (in months) in each role.

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The ELI Fellowship Program Outcome: Employer/Dean/Supervisor Survey (at Graduation)

The mission of the Education Leadership Institute (ELI) Fellowship is to develop innovative and influential leadership in physical therapy (PT and PTA) education who can function within a changing politico-socio-cultural environment. The survey is designed to capture how well the Education Leadership Institute Fellowship has met your expectations as a Direct Supervisor of an ELI Fellow. Please take a few minutes to answer the following questions:

Name of Dean/Supervisor: (optional)

Name of ELI Fellow: (required)

Fellow's APTA ID#: (if known)

Year of participant's graduation from the ELI Fellowship:

The ELI Fellowship contributed to the participant's ability to assume new leadership roles in my academic institution.

- Strongly Disagree Disagree Agree Strongly Agree

Describe the participant's new leadership role(s) in your academic institution. Indicate his/her length of time (in months) in each role.

The ELI Fellowship has contributed to the participant's ability to assume new leadership roles at the national, state, and/or local level of the profession.

- Strongly Disagree Disagree Agree Strongly Agree Don't know

Describe the participant's new leadership role(s) at the national, state, and/or local level of the profession. Indicate his/her length of time (in months) in each role.

The ELI Fellowship contributed to the participant's ability to assume new advocacy roles.

- Strongly Disagree Disagree Agree Strongly Agree Don't know

Describe the participant's new advocacy role(s). Indicate his/her length of time (in months) in each role.

The ELI Fellowship contributed to the participant's ability to assume new interprofessional leadership roles.

- Strongly Disagree Disagree Agree Strongly Agree

Describe the participant's new interprofessional leadership role(s). Indicate his/her length of time (in months) in each role.

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The ELI Fellowship Program Outcome: Employer/Dean/Supervisor Survey (at Graduation)

The ELI Fellowship contributed to the participant's ability to participate in new initiatives within the profession (public discourse).

- Strongly Disagree Disagree Agree Strongly Agree

Provide examples:

The ELI Fellowship contributed to the participant's ability to participate in new initiatives within my academic institution (change agent).

- Strongly Disagree Disagree Agree Strongly Agree

Provide examples:

Since attending the Education Leadership Institute, the participant has engaged in mentorship/empowerment of others.

- Yes
 No

Describe:

The ELI Fellowship has had a positive effect on the participant's current role.

- Strongly Disagree Disagree Agree Strongly Agree

Provide examples:

The ELI Fellowship provided the knowledge and skills needed for the participant's current role.

- Strongly Disagree Disagree Agree Strongly Agree

Provide examples:

The ELI Fellowship has contributed to the participant's ability to think strategically.

- Strongly Disagree Disagree Agree Strongly Agree

Provide examples:

The ELI Fellowship has contributed to the participant's understanding of the context in which his/her program operates.

- Strongly Disagree Disagree Agree Strongly Agree

Provide examples:

The the ELI Fellow has continued to network with other members of the ELI.

- Yes
 No
 Don't know

If yes, provide examples:

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The ELI Fellowship Program Outcome: Employer/Dean/Supervisor Survey (at Graduation)

The the ELI Fellow has been successful in achieving his/her professional leadership development plan outlined during the ELI.

- Yes
 No

The ELI Fellowship enabled the participant to better identify strengths and weaknesses in his/her leadership style.

- Strongly Disagree Disagree Agree Strongly Agree

The ELI Fellowship has helped the participant refine his/her leadership style.

- Strongly Disagree Disagree Agree Strongly Agree

Provide examples:

The leadership project had a meaningful impact on my organization.

- Strongly Disagree Disagree Agree Strongly Agree

Provide examples:

The leadership project provided the participant the opportunity to apply the leadership skills he/she developed as a result of the ELI Fellowship.

- Strongly Disagree Disagree Agree Strongly Agree

Provide examples:

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The ELI Fellowship Program Outcome: Employer/Dean/Supervisor Survey (at Graduation)

I would recommend the Education Leadership Institute Fellowship to others.

- Strongly Disagree Disagree Agree Strongly Agree

Provide rationale for your response:

As a result of the Education Leadership Institute Fellowship, how likely is it that the participant will assume a new leadership position in academic administration over the next 2 years?

- Very unlikely Unlikely Likely Very likely

Please describe any recommendations you have for the ELI Fellowship Work Group.

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[Submit Survey](#)

ELI Program Outcome: Employer Survey (Dean/Supervisor) Post-Graduation

The mission of the Education Leadership Institute (ELI) Fellowship is to develop innovative and influential leadership in physical therapy (PT and PTA) education who can function within a changing politico-socio-cultural environment. The survey is designed to capture how well the Education Leadership Institute Fellowship has met your expectations as a Direct Supervisor of an ELI Fellow Graduate. Please take a few minutes to answer the following questions:

Name of Dean/Supervisor: (optional)

Name of ELI Fellow: (required)

Fellow's APTA ID#: (if known)

Year of Fellow's graduation from ELI:

When are you completing this survey?

- 1 year post-graduation
 3 years post-graduation
 5 years post-graduation

The ELI Fellowship contributed to the Fellow's ability to assume new leadership roles in my academic institution.

- Strongly Disagree Disagree Agree Strongly Agree

Describe the Fellow's new leadership role(s) in your academic institution. Indicate his/her length of time (in months) in each role.

The ELI Fellowship has contributed to the Fellow's ability to assume new leadership roles at the national, state, and/or local level of the profession.

- Strongly Disagree Disagree Agree Strongly Agree Don't know

Describe the Fellow's new leadership role(s) at the national, state, and/or local level of the profession. Indicate his/her length of time (in months) in each role.

The ELI Fellowship contributed to the Fellow's ability to assume new advocacy roles.

- Strongly Disagree Disagree Agree Strongly Agree Don't know

Describe the Fellow's new advocacy role(s). Indicate his/her length of time (in months) in each role.

The ELI Fellowship contributed to the Fellow's ability to assume new interprofessional leadership roles.

Strongly Disagree Disagree Agree Strongly Agree

Describe the Fellow's new interprofessional leadership role(s). Indicate his/her length of time (in months) in each role.

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ELI Program Outcome: Employer Survey (Dean/Supervisor) Post-Graduation

The ELI Fellowship contributed to the Fellow's ability to participate in new initiatives within the profession (public discourse).

- Strongly Disagree Disagree Agree Strongly Agree

Provide examples:

The ELI Fellowship contributed to the Fellow's ability to participate in new initiatives within my academic institution (change agent).

- Strongly Disagree Disagree Agree Strongly Agree

Provide examples:

Since attending the Education Leadership Institute, the Fellow has engaged in mentorship/empowerment of others.

- Yes
 No

Describe:

The ELI Fellowship has had a positive effect on the Fellow's current role.

- Strongly Disagree Disagree Agree Strongly Agree

Provide examples:

The ELI Fellowship provided the knowledge and skills needed for the Fellow's current role.

- Strongly Disagree Disagree Agree Strongly Agree

Provide examples:

The ELI Fellowship has contributed to the Fellow's ability to think strategically.

- Strongly Disagree Disagree Agree Strongly Agree

Provide examples:

The ELI Fellowship has contributed to the Fellow's understanding of the context in which his/her program operates.

- Strongly Disagree Disagree Agree Strongly Agree

Provide examples:

The ELI Fellow has continued to network with other members of ELI.

- Yes
 No
 Don't know

If yes, provide examples:

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ELI Program Outcome: Employer Survey (Dean/Supervisor) Post-Graduation

The ELI Fellow has been successful in achieving his/her professional leadership development plan outlined during ELI.

Yes

No

The ELI Fellowship enabled the Fellow to better identify strengths and weaknesses in his/her leadership style.

Strongly Disagree Disagree Agree Strongly Agree

The ELI Fellowship has helped the Fellow refine his/her leadership style.

Strongly Disagree Disagree Agree Strongly Agree

Provide examples:

The leadership project had a meaningful impact on my organization.

Strongly Disagree Disagree Agree Strongly Agree

Provide examples:

The leadership project provided the Fellow the opportunity to apply the leadership skills he/she developed as a result of ELI.

Strongly Disagree Disagree Agree Strongly Agree

Provide examples:

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ELI Program Outcome: Employer Survey (Dean/Supervisor) Post-Graduation

I would recommend the Education Leadership Institute Fellowship to others.

- Strongly Disagree Disagree Agree Strongly Agree

Provide rationale for your response:

As a result of the Education Leadership Institute Fellowship, how likely is it that the Fellow will assume a new leadership position in academic administration over the next 2 years?

- Very unlikely Unlikely Likely Very likely

Please describe any recommendations you have for the ELI Fellowship Work Group.

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[Submit Survey](#)

Name:

Text

Year of graduation from ELI: (yyyy)

Text

What is your current role, including title and responsibilities?

What new responsibilities have you assumed at your academic program, in higher education, and in the profession (list both formal and informal) since graduating from ELI?

Academic Program:

Higher Education:

Profession:

Have you helped to facilitate/promote change initiatives in higher education?

- Yes
 No

Have you helped to facilitate/promote change initiatives in the profession?

- Yes
 No

Rate the overall positive impact of ELI on your leadership development using the following scale:

1=Very low 2=Low 3=High 4=Very high

How would you rate the overall positive impact of ELI on your leadership developmer

Please explain your overall rating below:

Click "Submit Survey" to submit your data. Thank you for your input.

Submit Survey

American Board of Physical Therapist Residency and Fellowship Education (ABPTRFE)

The Education Leadership Institute (ELI) Fellowship is a recognized accredited ABPTRFE clinical fellowship with program oversight to ensure its continued credibility as an accredited fellowship. Its initial credential approval was obtained August 2012.

An annual report is required for submission and review by ABPTRFE Board of Directors for continuation as an accredited clinical fellowship. As a part of this annual review process, the report collects outcome and ongoing program information about ELI Fellow graduates to determine if the program is meeting its intended vision, mission, and goals. Thus, ELI tracks assessment data from fellows-in-training throughout the program, and ELI Fellows at graduation, and 1, 3, and 5 years after graduation to respond to this requirement.

ABPTRFE's annual review of the 2015 ELI Fellowship program determined that ELI had remained in compliance with the fellowship criteria.

ELI Fellowship Work Group

Representation on the Education Leadership Institute Fellowship Work Group reflects a shared collaborative among the American Council of Academic Physical Therapy (ACAPT), the ATPA Education Section, PTA Educators Special Interest Group, and APTA as all of these stakeholders have an invested interest in the successful implementation and ongoing evaluation of the ELI Fellowship.

The work group oversees the management, development, implementation, and evaluation of the ELI Fellowship. It also reviews applicants to the ELI Fellowship and makes decisions regarding their acceptance. The group designed the framework for the program online (learning objectives, suggested content, identification of faculty, etc) and onsite curriculum content based on survey information collected from a variety of stakeholders within the education community. The assessments that are used throughout the ELI Fellowship were also developed and refined by this group.

Communication Vehicles

- The members of the ELI Fellowship Work Group communicate through a designated e-community of the APTA HUB designed exclusively for this group to develop, revise, and evaluate all ELI Fellowship documentation. Ongoing discussions about aspects of the program and documentation review are also managed by this group.
- In addition, the ELI Fellowship Work Group convenes by conference call, an annual meeting at APTA, and webinars throughout the year.

ELI Fellows-in-Training

Individuals who are either current physical therapist (PT) or physical therapist assistant (PTA) program directors or emerging leaders and potential directors complete all application materials for review by the ELI Fellowship Work Group. For applicants to the 2016-2017 cohort the call for applications was posted during the fall for submission by 5:00 pm ET on March 1.

Standard defined criteria are used to make the determination as to acceptance into the yearlong program. ELI Fellows-in-training interact as a group as a whole and in smaller mentorship groups with assigned ELI mentors.

Fellows-in-training complete a yearlong comprehensive and intensive program that includes a structured curriculum with ongoing mentorship and integration of curriculum content in real life work situations.

Communication Vehicles: Fellows-in-training have several differently structured communication vehicles, depending upon the component of the ELI Fellowship.

- *ELI Fellowship Program* – A separate ELI Program HUB Community is provided that includes all fellows-in-training, mentors, work group members and the program director. All program announcements and materials that affect all stakeholders in the Fellowship are posted regularly to this community.
- *ELI Online Modules* – Fellows-in-training interact with each other and with expert faculty through the APTA Learning Center discussion forum that accompanies each of the online modules. Faculty may pose reflective questions, discussion questions, and other assignments where fellows-in-training are expected to converse with one another throughout these online modules under the General Questions/Comments heading. Fellows-in-training are expected to interact with each other in the discussion forum without or with faculty intervention.
- *Virtual Office Hours* – Expert faculty interface with fellows-in-training using the discussion forum and live webinars defined as “live virtual office hours” as made available through three, 2-hour sessions where each faculty is available synchronously. All Fellows-in-training must attend at least one of the 3 available virtual faculty discussion forums to interact with expert faculty. Faculty do not have access to the ELI Fellowship HUB Community and are only accessible through the APTA Learning Center.
- *ELI Mentorship* – Fellows-in-training engage with their assigned mentors and colleagues in smaller mentorship groups that are identified by color (blue, green, and orange) and can be found in the APTA HUB Mentorship e-community. This community includes only those fellows-in-training and mentors that are assigned to the specific mentorship group. [Note: Faculties teaching online module content in the APTA Learning Center do not have access to the Mentorship or ELI Program HUB Community. They can only interact with ELI fellows-in-training through the discussion forum in the APTA Learning Center or during live webinars.

ELI Mentors

ELI fellowship mentors are highly experienced physical therapist and physical therapist assistant program directors invited to serve in a mentorship role for a fellow-in-training cohort throughout the year. Mentors are involved in the orientation webinar, 3 onsite courses where they facilitate the translation of curricular content in the online modules into physical therapy education and the academic administrator role as a coach and mentor, monthly mentorship group conference calls/webinars/chats, and other specific emails and correspondence. In addition, they have access to the online content modules to familiarize themselves with what fellows-in-training are learning and can engage in mentorship dialogue through the HUB community designed solely for the mentor/fellow-in-training mentorship groups provided in a system outside of the APTA Learning Center. Fellows-in-training are intentionally paired with mentors that are not from their academic institution or geographic location.

ELI mentors receive a Mentorship Resource Manual and an orientation with an experienced mentor to provide consistent direction and information in their roles and responsibilities as ELI mentors. Beginning in 2015 mentors were also granted access to an online mentorship course developed through ABPTRFE and available through APTA's Learning Center.

Communication Vehicles

- *ELI Mentorship* – Fellows-in-training engage with their assigned mentors in smaller mentorship groups that are identified by color (blue, green, orange) and are located in the APTA HUB community for 2015-2016. This community includes only those fellows-in-training and mentors that are assigned to the specific mentorship group to ensure privacy. Mentorship also occurs with participants through scheduled conference calls. Regular audio and/or video conference calls will be convened with mentors and their mentorship group on a monthly basis as scheduled by the group throughout the fellowship year.
- *ELI Mentors* – Mentor communication will occur primarily through conference calls, Webinars, and emails, given the size of the mentor group and to preserve the confidentiality of information that may be discussed.

ELI Faculty

Faculty possesses expertise in the defined areas of curricular content for the 9 online modules that comprise ELI and that are offered through APTA's Learning Center. ELI faculty have been identified by the ELI Fellowship Work Group based on their experiences and are recognized for their content expertise and body of work outside of physical therapy. Faculty bring to ELI expert knowledge across a variety of areas, and that by design, expand fellows-in-training knowledge beyond physical therapy to consider leadership within the context of higher education, health care, and society.

To facilitate the development and refinement of the curriculum, faculty interacts with one another, especially where curricular content is related or where concepts build from one module to the next.

Communication Vehicles

- Faculty interact with fellows-in-training through their online module using an asynchronous Discussion Forum that is exclusively designed for the faculty and fellows-in-training to dialogue with one another located in the APTA Learning Center.
- Fellows-in-training are expected to lead their discussions in this Discussion Forum and to share their reflections and pose questions of one another.
- Faculty identify specific times (three, 2-hour virtual sessions) when they will be available for questions/consultation in the discussion forum online synchronously or through a live Adobe Webx Webinar session.
- Online modules are launched one at a time to allow participants to begin one module prior to moving to the next module. The Program Director provides announcements in the ELI Program HUB Community to assist in pacing fellows-in-training throughout the program.
- All online course modules that are grouped together (ie, Modules 1-3; Module 4-6; Modules 7-9) and must be completed by participants prior to each onsite session, where this content will be integrated and applied to case and real life situations. All course readings, assignments and posttest module assessment are completed prior to the onsite session and required for completion of the courses and earned CEUs.

- Expert faculty will have 2 hours during each on-site session (October, March, and July) to interact with fellows-in-training through a live Webinar about the curricular content. Fellows-in-training pose questions in advance for faculty to address during the live webinar and faculty may also provide hot updates to their content. It is expected that fellows-in-training will provide questions in advance of each live Webinar session for each of the online modules to be shared with the faculty and for them to be able to respond during the Webinar. Fellows-in-training will be expected to pose their questions of faculty directly during the onsite sessions.

ELI Program Director and APTA Staff

The ELI Program Director and APTA staff are involved in the fellowship and in working with the ELI Fellowship Work Group and other related staff work groups (ie, development of a set of case studies for onsite program), orienting mentors, working with faculty in the implementation and evaluation of the fellowship program, and contributing to reports and responding to questions from ABPTRFE, as needed. All administrative, organizational, and managerial aspects of this program are the responsibility of the program director.

The APTA Director of Academic Services in the Education Department of the Professional Affairs Unit currently serves as program director and moderator for the orientation and onsite sessions.

Communication Vehicles

- The program director has access to and communicates through all of the available ELI Program HUB communication vehicles. The program director accesses all the online modules, discussion forums, and webinars and provides assistance through available resources at APTA, as required.
- The program director is accessible by email and phone. Contact information can be found on the ELI Fellowship Work Group Roster.



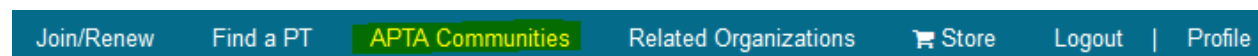
Technology and Communication APTA Education Leadership Institute (ELI)

DESCRIPTION OF ONLINE COMMUNITIES ON THE APTA HUB

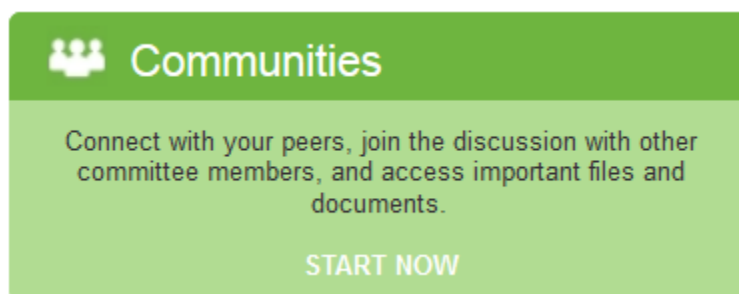
- ELI Program Community
 - All fellows-in-training, mentors, ELI Work Group members, and APTA staff have access to the ELI Program Community for the current cohort.
 - The ELI Program e-community includes announcements, a calendar of events, general discussion forum, reference materials, shared documents, and links.
- ELI Mentorship Group Communities (Blue, Green, Orange)
 - Fellows-in-Training are assigned to a mentorship subgroup identified by color (blue, green, orange).
 - Each mentorship subgroup includes 5-6 fellows-in-training and 2 assigned mentors.
 - The online community for each mentorship subgroup provides an opportunity for smaller groups to engage in shared dialogue and resources with mentors.
 - Each subgroup community includes announcements, a calendar of events, general discussion, reference materials, shared documents, and links.
 - Delineation of specific ELI subgroups can be found under reference materials under ELI Program.
 - Participants and mentors can share ideas, pose questions, and share resources and references with each other.

INSTRUCTIONS FOR ELI COMMUNITIES ON THE APTA HUB

- Go to the APTA website at www.apta.org
- Login with your member ID number (or email) and password.
- Click the APTA Communities link at the top of the screen.



- Click START NOW on the Communities panel to view communities open to you.



Technology and Communication APTA Education Leadership Institute (ELI)

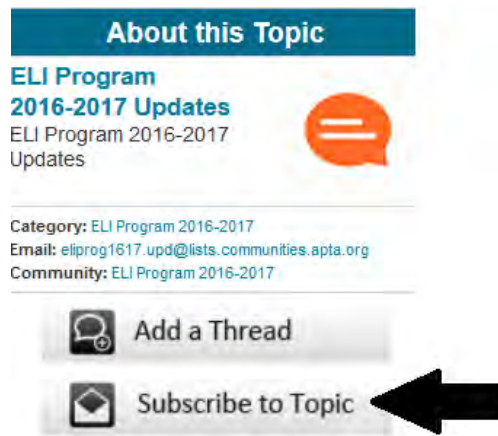
- Click on the (main) 2016-2017 ELI Community or the community for your assigned mentorship group. You should only have access to one mentorship group (blue, green, or orange).



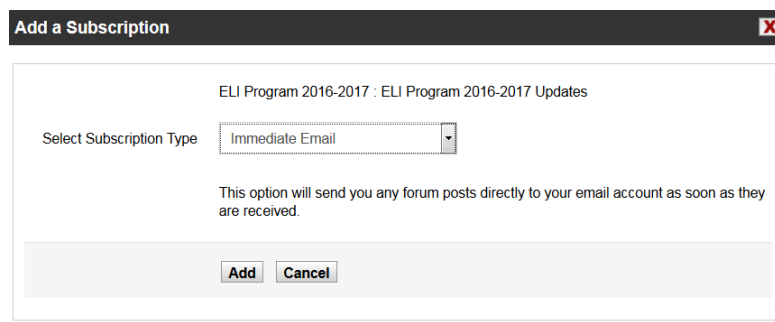
- Click on the “ELI Program 2016-2017 Updates” link under the FORUM tab.



- Once on the Updates screen, click the “Subscribe to Topic” button on the right-hand side.



- An “Add a Subscription” window will open. Select “Immediate Email” as Subscription Type and the “Add” button to ensure you receive important ELI announcements in a timely manner.



Technology and Communication APTA Education Leadership Institute (ELI)

- To return to the main community screen, click “ELI Program 2016-2017” under the About this Topic.



SIGNING OUT SHARE DOCUMENTS TO SAVE OR EDIT

- It is very important that when opening a document and wanting to save it to your personal files, if it is a “Shared Document” you must first sign out the document and will be given an option to either “read” or “edit” the document.
- If you want to save the document on your personal drive, please click “read” the document. You can then save the document using “Save as” to retain in your personal files.
- If you are working on a document with others and wish to edit the document, then click “edit” and enter your work. You will need to save the document with your revisions prior to signing the document back in for others to view your work.
- After completing this action, you must “sign in” the document so that others can access the same information. When you exit the Share Document, you will see to the right your name if the document is still signed out to you. Please note that while a document is signed out, no other participant may access this same document!
- The other option to sign a document back in is to right click on your mouse next to the document where a drop down list will appear. Click on “sign in” and then your name should disappear from the right of that document.



Technology and Communication APTA Education Leadership Institute (ELI)

ELI MODULES ON APTA LEARNING CENTER

- Accessing ELI On-line Learning Modules
 - All of the online coursework occurs in the APTA Learning Center under the Education Leadership Institute. As a participant in ELI, you will be automatically registered for these courses and can find the course listed under <http://learningcenter.apta.org/>.
 - Under “My Courses”, you will find each module as they become available to you.
 - The Module launch calendar is available on the ELI Program Community Hub.

- Each Module Includes:
 - Course overview
 - Learning objectives
 - Faculty biography
 - Virtual faculty hours
 - Course content with embedded cases, reflective and discussion questions
 - Required readings and other additional readings
 - Journaling, reflective, and applied assignments
 - Discussion forum activities
 - References
 - Post-test questions (must be completed to earn CEUs)
 - Post-course assessment (must be completed to earn CEUs)

- Technology Requirements
 - PC/Windows Users:
 - *Software requirements:*
 - Microsoft Windows 98 SE, Windows NT 4.0 SP6a, Windows 2000 SP4, or Windows XP Service Pack 1, Service Pack 2, or Service Pack 3, Windows Vista, or Windows 7
 - Internet Explorer 6.0 or later
 - *Minimum hardware requirements:*
 - 128 MB of RAM 16-bit video card capable of 1024x768 screen resolution or better
 - Speakers or headphones
 - Apple Users:
 - Mac OS X 10.3 or later
 - Safari or Firefox
 - Additional software (for both PC and Mac)
 - [Flash Player](#)
 - [Adobe Acrobat Reader](#)



Technology and Communication

APTA Education Leadership Institute (ELI)

WEBINARS

- ELI Orientation
 - The Orientation is scheduled in July and provided via an Adobe Connect webinar.
 - The purpose of the webinar is to get to know the participants and to answer questions that participants may have about the Education Leadership Institute.
 - The webinar requires the use of a phone (can be landline or cell phone), webcam (camera), Internet, and a computer.
- Technology Requirements
 - PC or Mac computer that must be physically connected to the Internet server (router and wireless will not work) to ensure that the bandwidth is sufficient to be able to access both the camera and the desktop
 - High speed internet access (dial-up will not work as it is too slow).
 - Webcam (can be any type of web camera, small portable that clips to the monitor and plugs into a USB port is sufficient. You will need to upload the software that comes with the camera to your computer.)
 - Access to a telephone (can be cell or landline) is best for the connection.
- Accessing the Webinar
 - See the connection information below and may change for each webinar.
 - <http://apta.adobeconnect.com/r55344288/>
 - Dial: 1-888-407-5039
 - Pass code: 42610998
 - Copy and paste link above into your browser.
 - Click “Guest” and enter your full name.
 - Join Audio Conference box: Select one option below:
 - “Dial-out [Receive a call from the meeting]”: Enter your direct phone number and the system will automatically call and connect you (preferred).
 - “Dial-in to the Audio Conference via Phone”: Manually call into the webinar using numbers above.
 - Mute your speakers in Adobe Connect. Speaker icon will turn white, when muted.
 - Turn on and share your webcam via Adobe Connect.
- Conference Calls
 - ELI mentors and fellows-in-training communicate through scheduled conference calls, Skype, or other technologies throughout ELI and are organized at a mutually available time (once per month) for the mentorship subgroup and managed by the assigned mentors. Topics are managed by the subgroup and adhere to the fellows-in-training covenant.
 - Technology Requirements: Landline or cell phone access (preferably not in a noisy place) and the number and password to access conference call provided by the convener of the call.



2016 BUDGET WORK PLAN

ACTIVITY: Education Leadership Institute	VP: TBD
CLASSIFICATION: Program	LEAD STAFF: J Frost, L Ross
STATUS: Existing	

Description

The Education Leadership Institute (ELI) Fellowship is an ABPTRFE accredited fellowship in higher education and reflects a shared collaborative between ACAPT, Education Section, PTA Educators SIG, and APTA. This yearlong blended learning program is designed to develop PT and PTA program directors and residency and fellowship directors with leadership skills to educate students about contemporary theories and research, facilitate change, implement strategic solutions in education in response to changes in health care and society, and engage in public discourse to advance the physical therapy profession. Evidence demonstrates that ELI graduates think more strategically and are transformed as leaders in physical therapy and higher education. APTA provides opportunities for ELI fellows-in-training and graduates to network as a community online and in-person.

There is currently a shortage of qualified leadership in PT and PTA education programs and in developing accredited clinical residencies and fellowships. Leaders in physical therapy academic programs set the direction for the future of educating future PTs and PTAs for the profession and in working toward the profession's vision.

Over the past 4 years, longitudinal data reported from ELI Fellows demonstrates that emerging leaders for PT and PTA programs have assumed programs director positions, leadership roles within higher education and interprofessional education, and leadership roles in ACAPT, Education Section, and the profession. ELI program data demonstrates that ELI graduates use the information learned throughout ELI to think strategically about leadership issues. It would be anticipated that this program would continue this positive track record in addressing these needs for physical therapy education and the profession.

Annual Report

Staff must develop and complete a required Annual Report and submit with final signatures to ABPTRFE by January 31, 2016.

Reaccreditation Report

Staff will be required to develop and submit a reaccreditation report to ABPTRFE between June and August 2016. The re-accreditation process requires a site team visit between July 2016 and June 2017. The reaccreditation report is required by ABPTRFE every 7 years and is in addition to the annual report.

Activities

ELI Fellowship activities include 1 orientation webinar, 3 onsite sessions, 9 online modules including discussion forums and live Webinars, graduation ceremony, marketing and promotion at meetings and online, annual alumni networking breakfast at ELC, ELI mentor conference calls, and ELI Work Group conference calls and annual onsite meeting.

Primary Strategic Plan Impact and Intended Audience

Transform the Profession, Objective 2; Transform the Profession, Objective 3

ELI develops strategic thinkers and leaders in physical therapy education and residency and fellowship programs who bridge academic and practice communities and advance innovative curriculum to better prepare practitioners for contemporary practice. Additional content and case studies will be incorporated into ELI to intentionally engage fellows-in-training in scenarios and discussions with mentors on how to further build strong academic-and clinical partnerships that result in educational programs that are better designed to meet the needs of society. Likewise, the ELI curriculum could include concepts of innovative practice models and interprofessional education and practice within case vignette discussions that could better enable new graduates to incorporate these concepts into clinical practice. ELI served as a model for new non-clinical-based residency and fellowship programs outside of APTA. Fellows have facilitated the development of new accredited residency and fellowship programs, postprofessional PhD/ScD programs, institutional leadership programs, assumed new program director positions, and assumed leadership roles for institutional assessment and more.

Intended audience(s): PT and PTA program directors and residency and fellowship directors.

Additional Strategic Plan Connection(s) and Intended Audiences

Intended audience(s):

Coordination and Collaboration Required

Staff in Academic Services work with other APTA staff in Professional Development, Research Services, Meeting Services, Publications, Art, Information Technology, and Finance on an annual basis to support the ELI Work Group, Fellows-in-Training, Mentors, and Faculty. Staff work with ACAPT, Education Section, PTA Educators SIG, and ABPTRFE to enhance and promote ELI to PT and PTA education communities.



BUDGET CALENDAR

WORKPLAN: EDUCATIONAL LEADERSHIP INSTITUTE (ELI) VP NAME: TBD	CLASSIFICATION: PROGRAM: LEAD STAFF / BUDGETEER: J FROST, L ROSS	The Education Leadership Institute (ELI) is an ABPTRFE accredited fellowship in higher education. The yearlong, blended learning program develops leadership skills in PT and PTA program directors and residency and fellowship directors.
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TASKS	START	✓ PT (SST)	STAFF / DEPT INVOLVED	✓ PT (BRD)	COMPLETION
1 ELI ANNUAL REPORT: ABPTRFE	11.20.2015	Not applicable	ACADEMIC SERVICES (2)	Not applicable	12.30.2016
2 RE-ACCREDITATION REPORT: ABPTRFE	5.2.2016	Not applicable	ACADEMIC SERVICES (2)	Not applicable	8.31.2016
3 ELI 2015-16 COHORT GRADUATION	7.13.2016	Not applicable	ACADEMIC SERVICES (2)	Not applicable	7.14.2016
4 ELI 2016-17 COHORT STARTS (TBD)	7.18.2016	Not applicable	ACADEMIC SERVICES (2)	Not applicable	7.31.2017
5 ELI WG ONSITE MEETING	8.9.2016	Not applicable	ACADEMIC SERVICES (2)	Not applicable	8.10.2016
6 ELI 2017-18 APP OPENS (TBD)	8.2.2016	Not applicable	ACADEMIC SERVICES (2)	Not applicable	12.30.2016
7 ELI SURVEYS FOR PREVIOUS YEARS	7.3.16	Not applicable	ACADEMIC SERVICES (2)	Not applicable	8.5.2016

JANUARY							FEBRUARY							MARCH							APRIL							MAY							JUNE										
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KEY PERFORMANCE INDICATORS

WORKPLAN: EDUCATIONAL LEADERSHIP INSTITUTE	CLASSIFICATION: PROGRAM
VP NAME: TBD	LEAD STAFF / BUDGETEER: J FROST / L ROSS

OPERATIONAL KEY PERFORMANCE INDICATORS

WHAT IS THE MEASURE OF THIS ACTIVITY'S OPERATIONAL SUCCESS?

The current ELI program director, Jody Frost, will retire in December 2015. Success in 2016 will be measured by APTA's ability to hire new, qualified staff and support the ongoing needs and activities of the ELI Fellowship program for the 2015-16 cohort through July 2016, and the new 2016-17 ELI cohort, if accepted.

STRATEGIC KEY PERFORMANCE INDICATORS

WHAT IS THE MEASURE OF THIS ACTIVITY'S STRATEGIC SUCCESS?

Longitudinal data collected via annual surveys of ELI fellows demonstrates that emerging leaders for PT and PTA programs have assumed programs director positions, leadership roles within higher education, and leadership roles in ACAPT, Education Section, and the profession. ELI program data also demonstrates that ELI graduates use the information learned throughout fellowship to think strategically about leadership issues. Future surveys will determine whether ELI has sustained its positive track record in addressing these needs for physical therapy education and the profession.

KEY PERFORMANCE INDICATOR REPORTING

HOW WILL THESE BE REPORTED?

The ELI survey results and performance indicators will be reported to ABPTRFE in both the 2016 Annual Report and 2016 Re-accreditation Report to maintain active program status in 2017.

1 [Unit – Professional Affairs; Department – Education; Board Chair – R. Herr/Board Member – L. Saladin;
2 Staff Liaison – L. Ross; B of D 11/15; Excellence in Physical Therapist Education Task Force Report]

4 EXCELLENCE IN PHYSICAL THERAPIST EDUCATION TASK FORCE

6 **MEETING:** The APTA Excellence in Physical Therapist Education Task Force met 22 times since January
7 2015, including 20 web conferences and 2 onsite meetings: National Harbor, Maryland on June 5, 2015
8 and APTA Headquarters in Alexandria, Virginia on September 13-14, 2015.

10 **CHARGE:** (B of D 11/2014, V-19) The Excellence in Physical Therapist Education Task Force will
11 provide strategic advice, counsel, and options to the Board of Directors regarding current and emerging
12 issues impacting the ability of physical therapist education to produce practitioners to meet the needs of
13 the current and evolving health care system. For the period January 1, 2015 to December 31, 2015, the
14 Board of Directors' determined charge for the Excellence in Physical Therapist Education Task Force to:

- 16 • Identify and review relevant background information, data, and knowledge
- 17 • Define the scope of the problem under consideration
- 18 • Develop a list of potential strategies to address the defined problem
- 19 • Consider and describe the feasibility, pros, and cons of identified strategies
- 20 • Provide options to the Board of Directors along with a recommendation for action.

22 The Excellence in PT Education Task Force charter was adopted at the November 2014 Board of
23 Directors meeting and amended at the August 2015 Board of Directors meeting (see V-3), by removing
24 the bullet below and transitioning this portion of the charge to the new Best Practice in Clinical
25 Education Task Force:

- 27 • Consider strategies and provide a recommendation(s) to the Board of Directors for responding
28 to RC-13-14 Best Practice for Physical Therapist Clinical Education by the 2017 House of
29 Delegates.

31 **BACKGROUND:** The 2014 House of Delegates adopted the following motions (full text of the motions is
32 found below):

- 34 • RC 12-14 PROMOTING EXCELLENCE IN PHYSICAL THERAPIST PROFESSIONAL EDUCATION
- 35 • RC 13-14 BEST PRACTICE FOR PHYSICAL THERAPIST CLINICAL EDUCATION

37 APTA's 2014 Mary McMillan lecturer, Dr. James Gordon, called for a study of physical therapist
38 education to consider such issues as the growing number of physical therapist education programs, the
39 shortage of qualified faculty and program chairs, and lack of clinical education sites. APTA's Catherine
40 Worthingham fellows, in a letter to the Board of Directors (Appendix A), echoed the need for such a
41 study.

1 RC 12-14 PROMOTING EXCELLENCE IN PHYSICAL THERAPIST PROFESSIONAL EDUCATION

2

3 To sustain present and promote future excellence in physical therapist education, APTA recommends
4 adoption and implementation of the following practices:

5

6 1. That physical therapists with an interest in teaching in physical therapist entry-level programs
7 seek a terminal academic degree or clinical doctorate degree and other credentials and
8 experiences that qualify them to become faculty members.

9

10 2. That people qualified to serve as program directors do so only when the program has adequate
11 resources and a commitment to innovation and excellence.

12

13 3. That people qualified to serve as faculty members do so only when the program has adequate
14 resources and a commitment to innovation and excellence.

15

16 4. That clinical sites be innovative in how they provide clinical education experiences and commit
17 to providing resources for clinical education experiences only when the academic program
18 commits to excellence in education and ongoing improvement and when the program's
19 students meet the standards for clinical performance.

20

21 5. That the Commission on Accreditation in Physical Therapy Education (CAPTE) make the criteria
22 for existing programs, expansion of existing programs, and candidate for accreditation status for
23 new programs more stringent to reflect the needs for qualified faculty and program directors,
24 access to sufficient clinical education sites, and adequate infrastructure (e.g., physical, fiscal, and
25 personnel); and the current and emerging needs of society. AND

26

27 RC 13-14 BEST PRACTICE FOR PHYSICAL THERAPIST CLINICAL EDUCATION

28

29 That the American Physical Therapy Association, in collaboration with relevant stakeholders, identify
30 best practice for physical therapist clinical education, from professional level through postgraduate
31 clinical training, and propose potential courses of action for a doctoring profession to move toward
32 practice that best meets the evolving needs of society with a report to the 2017 House of Delegates.

33

34 This effort shall include, but not be limited to, the examination of:

35

- 36 • Current models of physical therapist clinical education from professional level through
- 37 postgraduate clinical training
- 38 • Mandatory postgraduate clinical training
- 39 • Stages of licensure
- 40 • Findings from related studies and conferences
- 41 • Models and studies of clinical education in other health care professions

42

43 **SCOPE OF THE PROBLEM:** In 2014 the American Physical Therapy Association (APTA) adopted a new and
44 far-reaching Vision: "Transforming society by optimizing movement to improve the human experience".
45 Improving the human experience is a cornerstone of the Institute for Healthcare Improvement's "Triple
46 Aim"; "...improve the patient experience, improve our patient's health and decrease the per capita cost

1 of health care". If successful, optimizing movement to improve the human experience should result in
2 overall enhancement of our population's health. It is critical that physical therapist education evolve in
3 response to the challenge of transforming society.

4
5 Historically, the evolution of physical therapist education has been marked by a fragmented approach;
6 numerous groups within APTA have made attempts to advance physical therapist education, often in
7 divergent directions. Despite successful transition to the doctoral degree we have encountered variation
8 in admissions criteria, curricular design, clinical education, student and faculty preparation and
9 outcomes. These variations, combined with a marked shortage of qualified faculty and lack of
10 benchmark data for program assessment, pose a tremendous challenge to the physical therapy
11 profession: how to efficiently and effectively respond to the education needs demanded by an ever-
12 changing health care environment.

13
14 The Excellence in Physical Therapist Education Task Force (Task Force) identified the following principal
15 challenges in pursuing excellence in education:

- 16
17 1. Multiple stakeholders in physical therapist education have different priorities, approaches and
18 engagement resulting in duplication and divergent perspectives and activities.
- 19 2. There are widespread concerns that students are not optimally prepared for clinical education,
20 practice, and the evolving health care environment.
- 21 3. Accreditation for physical therapist education programs promotes minimum standards that neither
22 drive excellence nor distinguish between developing and established quality programs.
- 23 4. The physical therapist profession lacks a current, comprehensive, centralized, and accessible
24 repository of education-related data to drive decision-making and evidence-based teaching.
- 25 5. There is unwarranted variation in student qualifications, readiness, and performance across the
26 professional educational continuum that impacts academic and clinical faculty's ability to plan and
27 implement a quality educational experience that will optimize patient outcomes.
- 28 6. Research and evidence to support best practices, innovation, and excellence in physical therapist
29 education is very limited.
- 30 7. Many faculty accept positions without adequate preparation for their academic roles and
31 responsibilities, which contributes to the unwarranted variation in student performance.
- 32 8. Ineffective communication of initiatives and resources across stakeholders discourages sharing and
33 inhibits transparency, progress, and collaboration in the pursuit of excellence in physical therapist
34 education.

35
36 **RECOMMENDATION 1:**

37 **That a steering committee be established to oversee implementation of the recommendations of the**
38 **Excellence in Physical Therapist Education Task Force.**

39
40 **Key considerations of the steering committee should include the following:**

- 1 • **A composition that includes, but is not limited to, leaders from the American Council of Academic**
- 2 **Physical Therapy (ACAPT), Commission on Accreditation in Physical Therapy Education (CAPTE),**
- 3 **APTA Education Section, APTA Board of Directors and staff, and representatives from the clinical**
- 4 **community.**
- 5 • **Representative organizations must agree to provide joint funding and sign a formal agreement to**
- 6 **collaborate and make the outcomes of their work public.**
- 7 • **Representative members identified by each organization.**
- 8 • **Participants agree to provide their perspectives on the educational issues and work**
- 9 **collaboratively toward the greater good for the profession.**
- 10 • **Feedback that is solicited regularly from other stakeholders, such as clinical educators, employers,**
- 11 **students, the American Board of Physical Therapy Residency and Fellowship Education (ABPTRFE),**
- 12 **American Board of Physical Therapy Specialties (ABPTS), Federation of State Boards of Physical**
- 13 **Therapy (FSBPT), and physical therapist assistant (PTA) educators.**
- 14 • **Partnerships sought with other external groups, such as higher education administrators, other**
- 15 **health professional and interprofessional organizations, and employers.**
- 16 • **Processes that are transparent with vetted ideas, recommendations, and initiatives.**
- 17 • **Initial steering committee appointments for a minimum of 3 years with a process to stagger future**
- 18 **terms for members.**
- 19 • **Exploration of an ongoing representative body to continue the work of this initial steering**
- 20 **committee.**
- 21 • **Recommendations made by the steering committee to be shared with all representative**
- 22 **organizations to pursue endorsement and implementation.**

23

24 SS: The physical therapist education enterprise is represented by several groups within APTA and is,

25 thus, fragmented. Moreover, there is frequent tension among some of these groups, which hampers

26 collaboration. A steering committee by definition is an advisory committee consisting of high level

27 stakeholders or experts who provide guidance on strategic issues. The steering committee is intended to

28 be a different, more global, decision-making group that brings all stakeholders together to speak with 1

29 voice towards enhancement of the common cause of promoting excellence in physical therapist

30 education. It is recommended that the steering committee be comprised of the following key

31 stakeholder organizations that oversee and direct physical therapist education: ACAPT, CAPTE, APTA

32 Education Section, APTA Board and staff. Every stakeholder will have a voice and should strive to utilize

33 the strength and expertise of each stakeholder to advance excellence in physical therapist education.

34 The representative organizations would enter into a formal signed agreement to place the needs of

35 physical therapist education and practice above all other individual or specific stakeholder interests. To

36 ensure the commitment of each stakeholder, the steering committee will be jointly funded. It is

37 recommended that the size of the steering committee, driven by its function, will be comprised of 10 to

38 20 individual representatives. This size would be conducive to productive discussions and instrumental

39 for an effective and expeditious decision-making process; as evidenced by experience with the similar

40 sized Excellence in Physical Therapist Education Task Force. A precedent exists for APTA committees to

41 have 10-15 members, including the Leadership Development Committee and Public Policy and Advocacy

1 Committee. Each organization will develop its own vetting process for selecting its representative and
2 have the ability to select current board members or ex-officio leaders. Board members from their
3 respective organizations may be preferable, since collaborative efforts resulting from the steering
4 committee may have budget and resource implications. The steering committee will collaborate with,
5 and solicit feedback from, other key internal and external stakeholders. Examples include clinical
6 educators, employers, students, FSBPT, ABPTRFE, and ABPTS. Physical therapist assistant (PTA)
7 educators were not selected as part of the steering committee because they do not direct physical
8 therapist (PT) education and the PTA Educators Special Interest Group (SIG) is represented by the
9 Education Section. To improve transparency, collaboration and accountability, all recommendations
10 generated by the steering committee should be made available to the stakeholders in physical therapist
11 education, regardless of whether they are sanctioned by a particular board. The initial steering
12 committee and subsequent evolutions of the group should strive to be expeditious, so that priorities and
13 initiatives are identified quickly. The Excellence in Physical Therapist Education Task Force recommends
14 that a future group decide the longevity of this group and process.

15

16 **RECOMMENDATION 2:**

17 **That essential, rigorous, and progressively higher levels of outcome competencies [knowledge, skills,**
18 **and attitudes] for physical therapist graduates that are responsive and adaptive to current and future**
19 **practice be identified and adopted.**

20

21 SS: Graduating physical therapists who are proficient in clinical skills and demonstrate professional
22 behaviors are necessary, and yet, insufficient in today's rapidly changing health care environment. The
23 profession is consistently reminded that the physical therapist of today and the future must be prepared
24 for contemporary and future practice by being an active learner who is both proactive and adaptable in
25 responding to an ever-changing health care system. It is essential to adopt competencies that include
26 higher order constructs and are standardized across all physical therapist education programs. The
27 competencies must be forward thinking and dynamic as practice and health care evolve. The
28 competencies should also be rigorous with a goal of progressing to higher levels of ability. These
29 competencies are not synonymous with the profession-specific skills identified in the APTA's Minimum
30 Required Skills of Physical Therapist Graduates at Entry-Level. The recommendation is to identify
31 competencies that will help a graduate be a more effective member of the health care team. For
32 example, "prioritizing a differential diagnosis following examination of the movement system" has
33 implication for physical therapy, but is not owned exclusively by the physical therapy profession. These
34 global competencies move away from detailed procedural competencies classically used in defining
35 physical therapist skills. The competencies should reflect generalizable attributes that relate to the
36 Generic Abilities articulated by May et al. Higher order core competencies (e.g., building productive
37 interprofessional relationships, discovering efficiencies in care management, making sense of clinical
38 data, avoiding or reducing conflict) should be adopted that are "outward" facing to identify the role of
39 physical therapists in patient and client management, the health care system, and interprofessional
40 practice. These competencies should also be linked to the Triple Aim, a framework developed by the
41 Institute of Healthcare Improvement for improving the patient experience of care, improving the health
42 of populations, and reducing per capita cost of health care.

1
2 In 2014, the Association of American Medical Colleges (AAMC) published a list of activities that all
3 medical residents are expected to perform on the first day of their residency. The process used to
4 establish and standardize the entrustable professional activities (EPA) across medical schools may serve
5 as a useful model for this task. Some of the AAMC EPA should be considered as a subset of the
6 competencies. Likewise, the Canadian model of physiotherapy essential competencies for successful
7 practice may serve as an additional resource. Like the EPA, the Canadian competencies are concise, not
8 exhaustive. The term “essential” equates to competencies that are critical and necessary, not minimal.
9 The method of identifying core competencies should engage a variety of internal and external
10 stakeholders. Although the Excellence in Physical Therapist Education Task Force is recommending APTA
11 develop this set of core competencies, the charge can be delegated to or shared with other key groups
12 and organizations. The goal is to proactively adopt core competences that can build upon and extend
13 the minimum standards established by the Commission on Accreditation in Physical Therapy Education
14 (CAPTE). The identification of a core set of competencies that are measured both quantitatively and
15 qualitatively may lead to benchmarks of excellence for physical therapist education programs.
16

17 **RECOMMENDATION 3:**

18 **That essential resources to initiate and sustain physical therapist education programs that include, but**
19 **are not limited to, faculty, clinical sites, finances, and facilities, be determined.**
20

21 SS: Essential resources for developing and existing programs need to be prescriptive based upon the
22 best available evidence recognizing that data gaps may exist when identifying best practices. A thorough
23 review of the requirements and level of specificity required by other specialized accrediting bodies
24 would be informative. While it is not within the purview of the professional association to limit the
25 number of physical therapist education programs, it is imperative that the APTA collaborate with other
26 stakeholders to identify the critical and, where available, evidence-based resources necessary for an
27 educational program to prepare physical therapist graduates to meet the identified work force needs
28 and provide high quality physical therapy services. Because the Commission on Accreditation in Physical
29 Therapy Education (CAPTE) has expressed a desire to review and revise its pre-accreditation (candidacy)
30 process as part of its strategic plan, it would be prudent to prepare this feedback from stakeholders and
31 provide it to CAPTE before it begins deliberations.
32

33 The 2 types of resources that CAPTE most often cites as deficient are qualified core faculty and a
34 sufficient variety of clinical education sites. For decades, the profession has not had an adequate supply
35 of qualified faculty to meet the growing demand. CAPTE data indicates that developing physical
36 therapist education programs are frequently cited for having faculty members who lack contemporary
37 expertise in their assigned subject areas (36% at time of candidacy and 44% at time of initial
38 accreditation) or have an insufficient scholarly agenda (25% at candidacy and 31% at initial
39 accreditation). Furthermore, new programs are often cited for having an insufficient number of faculty
40 (14% at time of candidacy and 25% at time of initial accreditation) or an inadequate blend of faculty
41 expertise (14% at time of candidacy and 19% at time of initial accreditation). The fact that the
42 percentage of these citations tends to increase from the time of candidacy to the time of initial

1 accreditation suggests that developing programs are not very successful at recruiting qualified faculty
 2 and that established programs face similar faculty shortages. In recent years, vacancy rates for core
 3 faculty have fluctuated between 6.5 and 11%. Vacant faculty positions are often filled by (1) recruiting
 4 clinicians who must transition to an academic environment with little or no formal preparation; (2)
 5 hiring part-time/adjunct faculty whose primary responsibilities lie outside the program and institution;
 6 or (3) hiring non-physical therapists who lack the clinical perspective needed to apply their course
 7 content to the students' future practice. In addition to core faculty shortages, there is a limited supply of
 8 qualified clinical faculty and clinical education sites in some areas of practice to provide the variety and
 9 quality of learning experiences needed to prepare graduates for contemporary practice. Adequate
 10 resources for clinical education are cited 8% of the time in physical therapist candidacy decisions and
 11 12.5% of the time in initial accreditation decisions. In addition to the growing scarcity of resources for
 12 clinical education, some academic institutions have already set a precedent for compensating clinical
 13 sites in order to fulfill the needs of their individual programs. If this practice becomes more widespread,
 14 other academic institutions fear that they will be forced to increase student fees to cover this additional
 15 expense. An increase in tuition and fees will add to the educational indebtedness of Doctor of Physical
 16 Therapy (DPT) graduates who are already burdened with more debt than most of them will earn in their
 17 first year of practice.

18

19 **RECOMMENDATION 4:**

20 **That a comprehensive and progressive data management system for physical therapist education that**
 21 **is accessible to stakeholders and includes the following be established:**

22

- 23 • **A curriculum management system to track core outcome competencies, assist with monitoring**
- 24 **curricular requirements and modifications, and facilitate reporting.**
- 25 • **Standardized performance-based outcomes.**
- 26 • **Existing datasets that need to be integrated and consolidated.**
- 27 • **New data needs, as identified.**

28

29 SS: Access to a comprehensive and progressive data management system will foster a variety of
 30 strategies that will ultimately improve physical therapist education. Currently, data is collected in
 31 various organizational silos and is not easily accessible, nor is it easy to link data systems. Primarily, a
 32 new data management system will enhance decision-making in the profession for the purpose of driving
 33 excellence and minimizing variation in physical therapist education and clinical practice. Consolidated
 34 data would facilitate the redefining of current models of education and benchmarking of outcomes.
 35 Further, a new data management system would enhance the Commission on Accreditation in Physical
 36 Therapy Education's (CAPTE) current system to track substantive change to curricula and programs (e.g.,
 37 if there is more than a 10% increase in student enrollment). Examples of data sets to collect at the
 38 national level include the following: (1) learning management models; (2) faculty numbers and
 39 qualifications; (3) student and graduate tracking; (4) clinical education models and resources for
 40 infrastructure; and (5) educational indebtedness.

41

1 The creation of a curriculum management system would allow tracking of core competencies and assist
 2 with monitoring the addition and implementation of new curricular requirements. It would establish a
 3 method to identify what is taught and assessed across all physical therapist education programs. The
 4 application would create the ability to track content, assess variations and provide evidence to set
 5 benchmarks. This curriculum inventory would contribute to efforts to advance federal advocacy,
 6 practice, accreditation, institutional benchmarking, a revised Physical Therapist Normative Model, and
 7 program-specific assessments. Physical therapist education programs cannot lengthen programs by
 8 adding more curricular content without adjusting existing content. Additional and standardized
 9 curriculum data would allow programs and the profession to more easily identify what content areas
 10 could be eliminated or reduced. Development of this management system could be done
 11 independently, or in partnership with an external organizations or vendors, such as Association of
 12 American Medical Colleges (AAMC).

13

14 **RECOMMENDATION 5:**

15 **That the adoption of a system of standardized performance-based assessments that measure student**
 16 **outcomes and establish benchmarks be developed and promoted.**

17

18 SS: A set of standardized performance-based assessments would decrease unwarranted variation in
 19 physical therapist education and practice. These assessments would be progressive from the pre-
 20 admission process to graduation. The Excellence in Physical Therapist Education Task Force identified 2
 21 assessment priorities:

22

23 1. The profession should support the development of a standardized assessment for physical therapist
 24 students prior to entering their terminal clinical experience (Neal). The assessment would evaluate
 25 students' readiness for the clinical education and assist in improving relationships with clinical
 26 education sites by setting consistent standards for students before they begin these experiences.
 27 The assessment may also decrease unwarranted variation in student preparation, which would
 28 decrease the burden on clinical sites due to differences in curriculum across programs.

29

30 2. The profession should support the development of a standardized admission exam for physical
 31 therapist applicants. Other doctoring health care professions currently have standardized admission
 32 examinations including: Pharmacy College Admission Test (PCAT), Dental Admission Test (DAT) and
 33 the Medical College Admission Test (MCAT). The examination would evaluate students' knowledge
 34 of prerequisite curriculum allowing for a consistent quality of students entering a physical therapist
 35 curriculum. This process may also be used to qualify applicants for available scholarship
 36 opportunities based of examination scores and student needs.

37

38 The steering committee could identify other critical points in the educational continuum that should
 39 include a standardized assessment process. These assessments would be linked to the core
 40 competencies discussed in recommendation 2 and could assess measures beyond written tests,
 41 including an objective structured clinical examinations (OSCE). These standardized assessments would
 42 be used to identify students who achieve successful outcomes. Data derived from these standardized

1 assessments could then be used to establish benchmarks and provide evidence that defines excellence
2 in physical therapist education. Such benchmarks would be used to drive possible changes to the
3 curriculum and student learning experiences. The assessment system and outcomes would influence the
4 licensure exam blueprint and affect possible changes with the Federation of State Boards of Physical
5 Therapy (FSBPT), Clinical Performance Instrument (CPI), Physical Therapist Manual for the Assessment of
6 Clinical Skills (PTMACS), and the APTA patient survey.

7
8 Future enhancements or long term goals of the assessments could include the use of electronic health
9 records to assess performance of students and graduates, as well as the success of the physical therapist
10 education through the use of patient/client outcomes. Additionally, these outcomes could be used to
11 influence program curriculum and be linked to licensure.

12
13 **RECOMMENDATION 6:**

14 **That a prioritized educational research agenda be developed with identified mechanisms for research**
15 **funding and support.**

16
17 There is a paucity of evidence to determine drivers of excellence in physical therapist education. The
18 profession needs to determine effective practices that promote excellence and are driven by systematic
19 research and data. This research will also help determine outcomes of different clinical education
20 models. APTA needs to support the collection of evidence and research for education and identify key
21 questions and essential data in education. In 2003 APTA developed a consensus-based set of Education
22 Research Questions followed by the development of an Education Research Agenda in 2006 by the
23 Education Section that is in need of review and revision based on current priorities and identified needs.
24 Towards this end, the American Council of Academic Physical Therapy (ACAPT) appointed an Education
25 Research Task Force in 2015 under the leadership of Cecilia Graham, Bruce Greenfield, Gail Jensen,
26 Christine McCallum, Terry Nordstrom and Rick Segal (ACAPT liaison to the group). This group is
27 preparing a white paper on what is lacking in educational research so that areas of relevant research are
28 identified and discussed. This paper will be submitted to *Physical Therapy (PTJ)* by December 2015 and
29 could serve as the basis for developing a prioritized educational research agenda. The paper is intended
30 to address clinical education that promotes the best outcomes, curriculum delivery models,
31 prerequisites and admissions data that allow programs to produce the best students, institutional
32 resources that affect outcomes, and studies on educational indebtedness. A partnership with the
33 Education Section, ACAPT, Foundation for Physical Therapy, and other key stakeholders in physical
34 therapist education will be necessary to move forward on the research agenda and secure funding for
35 the same. Work remains to be done to consolidate existing data and provide the infrastructure for
36 maintenance. (See also recommendation 4.)

37
38 **RECOMMENDATION 7:**

39 **That needs for faculty development in the area of content expertise and best practices in education**
40 **are identified with coordinated mechanisms developed to address faculty needs across programs and**
41 **professions.**

42

1 SS: Along with addressing the shortage of qualified physical therapist faculty, APTA must explore
2 mechanisms to enhance faculty development and retention. According to the faculty data collected by
3 the Commission on Accreditation of Physical Therapy Education (CAPTE), the mean turnover rate among
4 core physical therapist faculty is currently about 6.5% with 179 vacant positions projected among the
5 242 programs included in that report. Nearly 20% of core faculty report being in their current position
6 less than 3 years and 56% have been in their positions less than 10 years. Only 45% of core faculty hold a
7 rank of associate professor or professor and only 50% are over age 50, which again suggests a relatively
8 young faculty workforce. Furthermore, CAPTE reports that fewer than half of physical therapist faculty
9 members hold a PhD degree and only 61% hold any type of doctorate. Thus, it is apparent that many
10 individuals who currently hold core faculty positions in physical therapist education programs are lacking
11 in the formal training and experience needed to function effectively in their faculty role. In particular,
12 individual core faculty members are frequently cited by CAPTE for lacking either content expertise or
13 knowledge related to educational theory, instructional methodology, and student assessment. Although
14 the profession has no data regarding the number of physical therapist faculty who leave their positions
15 due to failure to achieve promotion or tenure, the Excellence in Physical Therapist Education Task Force
16 anticipates that this could be a potential problem for those teaching in research-focused institutions,
17 which expect a higher degree of scholarship and grantsmanship. Once again, CAPTE data show a mean
18 of 4 faculty per program with grant funding (range = 0-17) out of an average of 10.7 core FTEs.
19 Endeavors such as New Faculty Development Workshops, the Educational Leadership Institute
20 Fellowship, and the recently launched American Board of Physical Therapy Residency and Fellowship
21 Education (ABPTRFE) competencies for academic programs to develop an accredited faculty residency,
22 have all helped address faculty development needs at various career stages; however, there is no
23 comprehensive plan or structured mentoring program to assist faculty in maintaining or enhancing their
24 expertise as teachers and scholars. Anecdotal data collected from participants at 1 faculty development
25 workshop for new faculty indicated a need for more training in curricular design and delivery; use of
26 technology; interprofessional education; advising and mentoring of students; and meeting expectations
27 for promotion, tenure and post tenure. Further dialogue is needed among educational stakeholders to
28 determine what resources need to be developed for faculty and how to best disseminate those
29 resources. A collaborative approach would maximize resource-sharing and develop a repository of
30 faculty development resources that any faculty member could access. These resources might address
31 topics, such as how to develop a course syllabus, use technology in the classroom, develop a web-based
32 course, write valid exam questions, structure interprofessional learning experiences, develop and
33 implement a scholarly agenda, and address students with challenges. Formal mechanisms to foster
34 networking and mentoring also need to be identified and coordinated on a national level to help
35 establish and attain a standard of faculty competence. This mentoring process should help alleviate
36 some of the unwarranted variation in student preparation.

37

38 RECOMMENDATION 8:

39 **That the report of the Excellence in Physical Therapist Education Task Force submitted to the APTA**
40 **Board of Directors November 2015 meeting be made available to stakeholders in physical therapist**
41 **education.**

42

1 SS: Making this report available to stakeholders will facilitate transparency, trust and collaboration. The
 2 intent is to share the report, regardless of what recommendations are adopted. Sharing the information
 3 with stakeholders to become informed of the work completed. Suggestions include publishing in
 4 *Physical Therapy (PTJ)* or *Journal of Physical Therapy Education (JOPTE)*. As a result of the report,
 5 individuals, faculty, and programs may begin to understand the discussions and ideas to identify areas of
 6 collaboration and different strategies to achieve the common goal of excellence in education.

7
 8 **SUMMARY OF MEETINGS:** The content and objectives of the task force onsite and virtual meetings have
 9 included the following:

- 10
 11 • Review of the charge, scope of work, and general guiding principles for the group.
 12 • Development of a work plan and identification of key topic areas.
 13 • Discussion of resources needed to support work of task force, including data, consultants, and
 14 speakers.
 15 • Participation in presentations delivered by multiple speakers on topics related to charge:
 16 o Katherine Berg, PhD, PT (University of Toronto)
 17 o Barbara Brandt, PhD (National Center for Interprofessional Practice and Education)
 18 o Terri Cameron, MA (Association of American Medical Colleges)
 19 o Tracy Chapman, PhD (Creighton University)
 20 o Gail Jensen, PhD, PT, FAPTA (Catherine Worthingham Fellows)
 21 o Justin Moore, PT, DPT (American Physical Therapy Association)
 22 o Libby Ross, MA (American Physical Therapy Association)
 23 o Sandra Wise, PhD (American Physical Therapy Association)
 24 • Identification of current and emerging trends in physical therapist education, health professions
 25 education, higher education, accreditation, practice, and health care.
 26 • Development of a recommendation to the APTA Board of Directors that a separate group should be
 27 established to address the detailed requirements in RC 13-14: “Best Practice for Physical Therapist
 28 Clinical Education.”
 29 • Discussion of the roles and responsibilities of major stakeholder groups in physical therapist
 30 education.
 31 • Review of the literature.
 32 • Identification of data gaps and unwarranted variation.
 33 • Development of recommendations for the APTA Board of Directors.

34
 35 **NEXT MEETING:** None

36
 37 **EXCELLENCE IN PHYSICAL THERAPIST EDUCATION TASK FORCE**

38 Roger A. Herr, PT, MPA, COS-C, Chair (NY)
 39 Rebecca L. Craik, PT, PhD, FAPTA (PA)
 40 Anthony Delitto, PT, PhD, FAPTA (PA)
 41 Jamie J. Dyson, PT, DPT (FL)

1 Peggy Blake Gleeson, PT, PhD (TX)
2 Nancy K. Hall, PhD (OK)
3 Martha R. Hinman, PT, EdD (TX)
4 Zoher F. Kapasi, PT, PhD, MBA (GA)
5 Karen A. Paschal, PT, DPT, MS, FAPTA (NE)
6 Lisa K. Saladin, PT, PhD (SC)

7

8 **CONSULTANT**

9 Sandy Rennie, BPT, MSc, PhD (Ottawa, Ontario)

10

11 **STAFF LIAISON**

12 Libby J. Ross, MA, Education Department

13

14

15 **REFERENCES**

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21 May, Warren W., et al. "Model for ability-based assessment in physical therapy education." *Journal of*
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25 <https://dukeahead.duke.edu/educator-competencies/assessment>

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27 "The Core Entrustable Professional Activities for Entering Residency." *Core EPAs - Initiatives - AAMC*.
28 Association of American Medical Colleges, May 2014. Web. 09 Oct. 2015.

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30

APPENDIX A

MEMORANDUM

July 16, 2014

TO: APTA Board of Directors

FROM: NATIONAL GOVERNANCE AND LEADERSHIP DEPARTMENT

RE: Catherine Worthingham Fellows

The following communication was sent by Marilyn Moffat on July 12, 2014.

Attached is the final revised motion from the CWFs to be placed on the agenda of the upcoming BoD meeting:

Whereas:

- The profession of physical therapy is facing a crisis in education manifested by the proliferation of new DPT and PTA programs
- There is an increased demand for diverse, qualified faculty, and clinical resources to assure high quality academic teaching, clinical education and research for all DPT and PTA programs;
- More information is needed regarding the necessary resources required to carry out high quality education and preparation of graduates as Doctors of Physical Therapy relative to:
 - The minimum number, content areas of knowledge and qualifications of faculty members required to adequately cover all aspects of the curriculum for the Doctor of Physical Therapy degree;
 - How to avoid significant compromise in quality of education as a consequence of temporary solutions to meet existing faculty resource shortages (e.g., core academic faculty, clinical affiliation sites, clinical faculty)
 - The criteria that need to be met to assure high quality, integrated clinical education
 - Objective documentation by all educational programs (new and existing) of the adequacy of program resources to meet all components of a DPT educational program: academic, clinical, and research

Move

That the Catherine Worthingham Fellows send a resolution to the APTA BoD urging immediate action relative to physical therapy professional education. The Catherine Worthingham Fellows recommend the BoD: 1) undertake an objective study of resources needed to assure high quality education in all Doctor of Physical Therapy Education programs and PTA programs; 2) arrange for the resource study to be carried out by a group of qualified investigators independent of the CAPTE or the APTA (e.g., Carnegie, Flexner); and 3) request the CAPTE to extend the time line for accepting major revisions of the accreditation criteria relative to resource needs for faculty, facility and integrative, clinical education *until the findings are available from the recommended resource study and the National Study of Excellence in Physical Therapist Education (Jensen, Hack, Gwyer, Mostrom, Nordstrom).*

Motion approved by 98 of 101 responding Catherine Worthingham Fellows (total 153)

Course Title: ELI: Module 1- Personal Leadership and Management

Category: Online

CEUs: 4.2 CEUs/42 contact hours/CCUs (with posttest)

Level of Audience: Multi-level

Description:

The Personal Leadership and Management (PLM) Module is the foundational module for the APTA Education Leadership Institute (ELI). Welcome to the ELI! You have been identified as a future leader and the ELI will assist you in maximizing your leadership potential. In the PLM module, you will begin your leadership development journey through a review contemporary leadership literature, leadership self assessments, and reflections from leadership theorists and practitioners that highlight personal leadership as it is applied to the management of higher education institutions. The Bolman and Deal (2008) theoretical framework—or the Four Frames Approach—is used as the basis for our collaborative exploration of personal leadership, and applicable throughout the entire ELI. This framework is informed by additional readings and discussions that focus on personal leadership.

A PLM Library is provided, which includes required and recommended texts. Each PLM Outcome Objective will be linked to a required text or texts. Those texts will be identified at the beginning of each PLM Outcome Objective. Embedded in each objective are personal reflection opportunities and assignments. The assignments will be discussed during the fall on-site component of ELI.

Learning Objectives:

After completing this course you will be able to:

1. Explain and apply contemporary leadership theories, principles, and values that are relevant to your personal leadership development.
2. Identify and explain management strategies that are grounded in leadership principles, ones that you can apply in institutional settings, strengthening your capacity to navigate the environment of higher education.
3. Demonstrate leadership behaviors that are authentic, grounded in institutional and professional values, and achieve the intended results.
4. Justify and explain decisions and actions to others based on an understanding of the academic administrator's responsibilities, a sense of duty to represent faculty and students, and alignment congruent with institutional values, priorities, and directives.
5. Apply methods of management and principles of leadership, and the use of reflection, to navigate the changing higher education environment, empowering you to better respond to the opportunities, threats, and challenges inherent in the contemporary higher education environment.

Agenda:

Required readings (listing found in resources):	1500 minutes
Introduction and Overview:	30 minutes
Section 1:	40 minutes
Section 2:	40 minutes
Section 3:	20 minutes
Section 4:	30 minutes
Section 5:	30 minutes
Conclusion:	15 minutes
Posttest:	60 minutes
Journaling Assignments	240 minutes
Discussion Forum Postings	210 minutes
Self-Assessment and analysis	30 minutes
Activities/Reflective exercises	240 minutes
Feedback from others forms	30 minutes
Total:	2515 minutes
Total Minutes divided by 60:	41.91
Total CEUs:	4.2 CEUs

Brief Presenter Biography:**LYNN M. GANGONE, EdD**

VICE PRESIDENT, LEADERSHIP PROGRAMS

Lynn M. Gangone, EdD joined the American Council on Education (ACE) in April 2015 as vice president for leadership programs. She is a seasoned higher education leader with both campus- and association-based senior leadership experience and is responsible for guiding the Council's suite of programming for current and future higher education leaders. She has conducted research and published in a number of areas, including women's leadership and advancement and nonprofit organizational viability and change management.

Gangone most recently was the dean of Colorado Women's College at the University of Denver (DU), and also was a clinical professor of higher education at DU's Morgridge College of Education. Prior to DU, she was a visiting professor at the George Washington University (DC) Graduate School of Education and Human Development and a strategic planning consultant with Kaludis Consulting.

Gangone has served higher education as a faculty member, administrator, association executive, lobbyist and policy analyst, and is a former vice president of the Maryland Independent College and University Association.

She received an EdD and MEd in higher and postsecondary administration from Columbia University (NY); an MS and CAS in counseling psychology from the University at Albany, State University of New York; and a BA in political science from The College of New Rochelle (NY). She was a member of the Class of 2010 at the Harvard Institute for Educational Management (MA). Dr Gangone was previously honored as one of the Top 25 Most Powerful Women in Colorado (Colorado Women's Chamber of Commerce), as well as one of the 2013 "Women Making History" (Colorado Black Women for Political Action). Other honors include Woman of Distinction (Girl Scouts of Colorado) and the University of Denver Center for Multicultural Excellence's "Outstanding Achievement in Multicultural Excellence" award. In addition, she has been honored by the American College Personnel Association (ACPA) as a Diamond Honoree and by The College of New Rochelle with the Ursula Laurus citation. To learn more about Lynn Gangone, visit <http://www.acenet.edu/news-room/leadership-bios/Pages/Lynn-M-Gangone.aspx>.

Course Content/Outline:**Introduction**

- ✓ Required Activity: Leadership Assessments (slide 16)
- ✓ Discussion Forum: Your Thoughts? (slide 17)

Section 1 – Personal Leadership and Management (PLM)

- ✓ Stop and Think: What is Leadership? (slide 5)
- ✓ Stop and Think: Definition of Leadership (slide 11)
- ✓ Journaling Activity: 5 Shadows (slide 23)
- ✓ Activity: Written Leadership Strategy (slide 24)

Section 2 – Management Strategies

- ✓ Activity: Bolman and Deal's Leadership Orientations Quiz (slide 4)
- ✓ Discussion Forum Activity: Discussing Your Results (slide 5)
- ✓ Journaling Activity: Applying the Frames (slide 17)
- ✓ Writing Activity: Leadership Strategy (slide 19)

Section 3 – Leadership Behaviors

- ✓ Stop and Think: Reflecting on Your Leadership (slide 3)

- ✓ Stop and Think: Tempered Radicals and You (slide 10)
- ✓ Writing/Collaborative Activity: Personal Case Study Shared with a Mentorship Group Partner (slide 12)

Section 4 – Institutional Values, Priorities, and Directives

- ✓ Stop and Think: Vocation and Authenticity —“A Life Divided No More” (slide 5)
- ✓ Written Activity: Theories-in-Use (slide 16)
- ✓ Written Activity: Updating Your Leadership Reflections (slide 17)

Section 5 – Application of Leadership and Management to Change

- ✓ Written Activity: Become a Participant-Observer (slide 7)
- ✓ Group Activity, Part 1/ Discussion Forum: Reframing Leadership Challenges (slide 13)
- ✓ Group Activity, Part 2/ Discussion Forum: Reframing Leadership Challenges (slide 14)
- ✓ Written Activity: Develop an Action Plan (slide 15)

References:

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2. Covey SMR. The Speed of Trust: The One Thing That Changes Everything. New York, NY: Simon and Schuster Free Press; 2008.
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11. Collins J. Good to Great and the Social Sectors. Boulder, CO: Jim Collins; 2005.
12. Hughes R, Ginnett R, Curphy G. Leadership: Enhancing the Lessons of Leadership. 5th ed. New York, NY: McGraw-Hill; 2006. (Section 1)
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Posttest:

1. When considering leadership, you must include characteristics of the leader, behaviors of the followers, and the situation. (Module 1/Objective 1)
 - a. **True**
 - b. False
2. Leadership is driven by both personality and group processes. (Module 1/Objective 1)
 - a. **True**
 - b. False
3. Leadership is an observable, learnable set of practices. (Module 1/Objective 1)
 - a. **True**
 - b. False
4. The most important attribute of appreciative leadership is: (Module 1/Objective 1)
 - a. Appreciating everyone's strengths.
 - b. Enthusiasm.
 - c. **Personal leadership awareness and capacity.**
 - d. Individual leadership drive.
5. All leaders have: (Module 1/Objective 1)

- a. **Both a light side and shadow side.**
 - b. Integrity and authenticity.
 - c. Certainty about the right course of action.
 - d. Someone who has served as a mentor.
6. To understand the “four frame approach,” a leader/manager must understand his/her preferred frames. (Module 1/Objective 2)
- a. **True**
 - b. False
7. The structural frame is the best frame to use in any organization. (Module 1/Objective 2)
- a. True
 - b. **False**
8. The symbolic frame is the hardest frame to understand and implement. (Module 1/Objective 2)
- a. **True**
 - b. False
9. In higher education environments, leaders need not be concerned with the political frame. (Module 1/Obj. 2)
- a. True
 - b. **False**
10. The best managers and leaders regularly employ the “four frame approach” because complex challenges require artistic solutions. (Module 1/Objective 2)
- a. **True**
 - b. False
11. Practiced leaders always have clarity and pursue positions that are consistent with their values. (Module 1/Objective 3)
- a. True
 - b. **False**
12. Tempered radicals are always seeking radical change in organizations. (Module 1/Objective 3)
- a. True
 - b. **False**
13. It is not unusual for individuals to experience misalignment with their organization’s culture. (Module 1/Objective 3)
- a. **True**
 - b. False
14. One’s gender has absolutely no impact on how she or he is perceived as a leader. (Module 1/Objective 3)
- a. True
 - b. **False**
15. Tempered radicals navigate a continuum from quiet resistance to organizing collective action. (Module 1/Objective 3)
- a. **True**
 - b. False
16. Authentic leaders have an obligation to: (Module 1/Objective 4)
- a. **Know themselves.**
 - b. Disclose their ego struggles with all coworkers.
 - c. Be the Rosa Parks of their organization.
 - d. Always represent the underdog.
17. Kouzes and Posner draw on Berlew’s ideas to inform their six effective communication strategies. (Module 1/Objective 4)
- a. **True**
 - b. False

18. Charisma is absolutely necessary for leaders to be seen as effective. (Module 1/Objective 4)
- a. True
 - b. **False**
19. A typical response to a challenging situation is for a leader to initially be very self-protective. (Module 1/Objective 4)
- a. **True**
 - b. False
20. Bolman and Gallo's four habits of learning for leadership effectiveness include waiting for feedback from colleagues. (Module 1/Objective 4)
- a. True
 - b. **False**
21. In Madsen's study the common denominator was the capacity to be a participant-observer. (Module 1/Obj. 5)
- a. **True**
 - b. False
22. Active reflection is an essential element of being a good participant-observer. (Module 1/Objective 5)
- a. **True**
 - b. False
23. Academic leadership requires reframing to deal with the complexity of issues in contemporary higher education. (Module 1/Objective 5)
- a. **True**
 - b. False
24. Feeling and faith have absolutely no role in effective leadership. (Module 1/Objective 5)
- a. True
 - b. **False**
25. Culture is the most difficult element of change management. (Module 1/Objective 5)
- a. **True**
 - b. False

Course Title: ELI: Module 2- Higher Education, Health Care Systems, and Society**Category:** Online**CEUs:** 4.0 CEUs/40 contact hours/CCUs (with posttest)**Level of Audience:** Multi-Level**Description:**

In this second module, we will explore domains that will be the contextual settings for your practice as an academic leader. These domains will be:

- Higher education,
- Health care systems, and
- Society.

Realize that these domains are being artificially separated to address them in this particular learning module, but that in reality they intersect and mutually influence each other in a complex manner. There are 4 outcome objectives presented to structure your learning.

To facilitate deep learning of the presented material, questions and activities will be inserted along your learning journey. A final set of learning activities will serve as foundations for discussion during the fall on-site component of ELI.

Learning Objectives:

After completing this course you will be able to:

1. Differentiate among types of higher education institutions and evaluate the relationship between type of institution and your concomitant role as an academic leader.
2. Explore mechanisms of oversight in higher education and analyze their impact on and importance to physical therapy education.
3. Evaluate the influence of major trends and issues in health care on physical therapy education.
4. Evaluate the influence of major trends and issues in society on physical therapy education.

Agenda:

Topic	Minutes
Required readings (listing found in resources):	1500
Introduction and Overview:	20
Section 1:	55
Section 2:	40
Section 3:	45
Section 4:	30
Conclusion:	20
Posttest:	60
Journaling Assignments	200
Discussion Forum Postings	180
Activities/Reflective exercises	240
Total:	2390
Total Minutes divided by 60:	39.83
Total CEUs:	4.0 CEUs

Brief Presenter Biography:

Dr. Charlotte Royeen received her BS degree in Occupational Therapy from Tufts University, her MS in Occupational Therapy from Washington University in Saint Louis, and her PhD in educational research and evaluation from Virginia Polytechnic Institute and State University (VA Tech). She has worked in the federal government, as a private contractor and as a consultant to business and industry.

She started her academic career at Howard University in Washington, DC, and has worked as a faculty and administrator at Shenandoah University in Winchester, VA, and Creighton University in Omaha, NE. Royeen served as Dean of the Edward and Margaret Doisy College of Health Sciences at Saint Louis University for nearly a decade and is now serving as a full professor in the department of occupational science and occupational therapy. Dr Royeen currently serves as an external member on the Commission for Accreditation in Physical Therapy Education.

Course Content:**Section 1 – Leading Higher Education Institutions**

- ✓ Stop and Think: Status of Institutions (slide 9)
- ✓ Stop and Think: Classification of Institutions (slide 12)
- ✓ Research Activity: Carnegie Rating of Your Institution (slide 13)
- ✓ Research/Written Activity: Mission and Philosophy of Education for your Program and Institution (slide 15)
- ✓ Research Activity: Oversight Mechanisms for Your Institution (slide 18)
- ✓ Research Activity: Funding (slide 20)
- ✓ Stop and Think: Learned Societies (slide 23)
- ✓ Stop and Think/Journaling: Reflecting on the Readings (slide 27)
- ✓ Stop and Think/Journaling: Professional and Liberal Education (slide 28)
- ✓ Stop and Think: Professional Practice (slide 29)
- ✓ Stop and Think: Professional Judgment (slide 30)
- ✓ Stop and Think: Practical Wisdom (slide 31)
- ✓ Stop and Think/Journaling: Discipline Narratives (slide 32)
- ✓ *Discussion Forum: Points for Reflection (slide 35)*

Section 2 – Oversight in Higher Education

- ✓ Stop and Think: Your Accreditation (slide 9)
- ✓ Stop and Think: Academic Freedom (slide 15)
- ✓ Stop and Think: The Professoriate (slide 16)
- ✓ Stop and Think: Faculty Advancement (slide 17)
- ✓ Stop and Think: Program Outcomes (slide 18)
- ✓ Stop and Think: Institution Outcomes (slide 19)
- ✓ Stop and Think: Communications (slide 22)
- ✓ Research Activity: Student Satisfaction and Competence (slide 24)
- ✓ *Discussion Forum: Points for Reflection (slide 27)*

Section 3 – Trends in Health Care

- ✓ Research Activity: Living History (slide 5)
- ✓ Stop and Think: Your Costs (slide 7)
- ✓ Stop and Think: What are the Impacts? (slide 11)
- ✓ Stop and Think: Your Experience (slide 14)
- ✓ Stop and Think: Physical Therapist Specialization (slide 17)
- ✓ Stop and Think: Right or Privilege? (slide 19)
- ✓ Stop and Think: The Need for Care (slide 20)
- ✓ *Discussion Forum: Provision of Primary Care (slide 26)*
- ✓ *Discussion Forum: Points for Reflection (slide 31)*

Section 4 – Major Trends in Society

- ✓ Stop and Think: Changing Physical Therapy Demographics (slide 12)
- ✓ *Discussion Forum: What’s Killing Us?* (slide 14)
- ✓ Written Activity: Preparing for These Trends (slide 20) – Refer to “View Content” for Worksheet

Section 5 – Conclusion and Summary of Assignments

- ✓ Stop and Think: Shared Governance (slide 3)
- ✓ Stop and Think: Autonomy (slide 4)
- ✓ Meeting Activity I: Discuss Academic Freedom (slide 5)
- ✓ Meeting Activity II: Discuss ACA and Health Care Reform (slide 6)

References:

1. Bahls SC. Board complacency and the experienced president. *Trusteeship. Association of Governing Boards of Universities and Colleges.* 2011;19(1):15-19.
2. Barker T. Academic freedom at heart of UMSL flap: teacher says he was forced out after videos misrepresented class; school says he left willingly. *St Louis Post Dispatch.* May 7, 2011:a-1,a-5.
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4. Dunn DS, McCarthy MA, Baker SC, Holonen JS. *Using Quality Benchmarks for Assessing And Developing Undergraduate Programs.* San Francisco, CA: Jossey Bass; 2011.
5. Eaton JS. Accreditation and the federal future of higher education. *Academe.* 2010;96(5):21-24.
6. Gasman M. Five lessons for campus leaders: academic freedom, shared governance and tenure at an historically black institution, *Change.* 2010; Nov/Dec; 54-57.
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8. Sabus C. Endangered roles in physical therapist education: A feminist vision for scholarship in clinical education. *J Phys Ther Educ.* 2010; 24(3): 44-49.
9. Sanchez F. No better export: Higher education. *The Chronicle of Higher Education.* April 8, 2011; A 43.
10. Sieben L. Counseling directors say more students have severe psychological problems. *The Chronicle of Higher Education.* April 8, 2011; A 35-36.

Posttest

1. Early higher education in the U.S. was grounded in: (Module 2/Objective 1)
 - a. Philosophy
 - b. Religion**
 - c. Liberalism
 - d. Equality
 - e. All of the above

2. The most valued institution of higher education in today's society is the: (Module 2/Objective 1)
 - a. Tribal college
 - b. Liberal arts institution
 - c. Vocational training
 - d. Research university**
 - e. All of the above

3. The Morrill Act resulted in: (Module 2/Objective 1)
 - a. Ivy league institutions
 - b. Private institutions
 - c. Land grant institutions
 - d. For profit institutions
 - e. All of the above**

4. What category of institution has the worst graduation rates? (Module 2/Objective 1)
 - a. Not for profit
 - b. For profit**
 - c. State institutions
 - d. Private institutions
 - e. Newer institutions

5. The rating system for colleges and universities was developed by: (Module 2/Objective 1)
 - a. The Carnegie Foundation**
 - b. CHEA
 - c. CAPTE
 - d. U.S. Department of Education
 - e. All of the above

6. Fiduciary responsibility for institutions of higher education is assumed by whom? (Module 2/Objective 1)
 - a. CAPTE
 - b. University's Board of Trustees**
 - c. University's Students
 - d. Parents of students in the university
 - e. All of the above

7. Private and public higher education institutions in New Jersey are accredited by which regional accreditor? (Module 2/Objective 2)
 - a. New England Association of Schools and Colleges
 - b. Southern Association of Colleges and Schools
 - c. Middle States Association of Schools and Colleges**
 - d. North Central Association of Schools and Colleges
 - e. Northwest Commission on College and Universities

8. Which type of institution typically does not have a regional accreditation? (Module 2/Objective 2)
- Research universities
 - Tribal Colleges
 - Private institutions
 - Public institutions
 - Proprietary institutions**
9. Accreditation is based on: (Module 2/Objective 2)
- Peer review and self assessment**
 - U.S. government control
 - Professional autonomy
 - Past performance of the institution
 - All of the above
10. Accreditation reflects societal innovation to address needs including more transparency, great student success and assessment of: (Module 2/Objective 2)
- Standards
 - Faculty
 - Process
 - Financial status
 - Outcomes**
11. Ideally, faculty meetings should be run as a: (Module 2/Objective 2)
- Report session
 - Decision making session
 - Dialogue**
 - Administrative update
 - All of the above
12. In 2006, what were U.S. national health expenditures? (Module 2/Objective 3)
- 75 billion
 - 150 billion
 - 1 trillion
 - 2.1 trillion**
 - None of the above
13. What was the per capita expenditure of U. S. health care dollars in 2006? (Module 2/Objective 3)
- \$365
 - \$2,700
 - \$7,026**
 - \$28,000
 - None of the above
14. Which country does not have universal health care? (Module 2/Objective 3)
- United Kingdom
 - Australia
 - New Zealand
 - Netherlands
 - United States**
15. Primary care consists of all of the following except? (Module 2/Objective 3)
- First contact provider
 - Longitudinal following over time

- c. Comprehensive care
 - d. Coordinated and integrated care
 - e. Universal health coverage**
16. What social movement played the largest role in current U.S. health care configuration? (Module 2/Objective 3)
- a. Accreditation
 - b. States rights
 - c. The union movement**
 - d. The progressive movement
 - e. None of the above
17. In 2050, the U.S. population will be bigger, older and more: (Module 2/Objective 4)
- a. Diverse**
 - b. Homogeneous
 - c. Rural
 - d. Inland
 - e. All of the above
18. In 2050, what percentage of the population will be over 65? (Module 2/Objective 4)
- a. 8.1%
 - b. 12.8%
 - c. 20.2%**
 - d. 30.4%
 - e. None of the above
19. Which of the following states will continue to be one of the largest destinations for immigrants to the U.S.? (Module 2/Objective 4)
- a. California
 - b. New York
 - c. Texas
 - d. Florida
 - e. All of the above**
20. Which of the following is among the 10 leading causes of death in the U.S. from 2007? (Module 2/Objective 4)
- a. AIDS
 - b. Amyotrophic Lateral Sclerosis
 - c. Multiple Sclerosis
 - d. Suicide
 - e. Alzheimer's Disease**
21. Which student services are likely to be the most needed in the next decade? (Module 2/Objective 4)
- a. Tutoring
 - b. Psychological support**
 - c. Athletic training
 - d. Manners
 - e. All of the above
22. Which of the following would CAPTE be considered? (Module 2/Objective 4)
- a. Regional accreditor
 - b. Federal accreditor
 - c. Specialty accreditor**
 - d. CHEA accreditor
 - e. All of the above

23. For a department chair, the most important variable to manage is: (Module 2/Objective 4)
- a. Accreditation
 - b. Student performance
 - c. **Change**
 - d. Faculty
 - e. All of the above

Course Title: ELI: Module 3 - Institutional Leadership and Management

Category: Online

CEUs: 3.6 CEUs/36 contact hours/CCUs (with posttest)

Level of Audience: Multi-Level

Description:

In this 5-part module we will review contemporary leadership models that are useful in institutions and how management skills can complement leadership. There are 5 outcome objectives to assist you in structuring your study. A required reading list is provided with a recommended text for your leadership library shelf. Embedded in each objective are personal reflection opportunities and assignments. Learners can obtain CEUs via post-module questions that have been provided. This introduction provides the objectives for Module 3 and suggested resources and references.

Learning Objectives:

After completing this course you will be able to:

1. Describe and apply contemporary leadership theories, principles, and values that are relevant to higher education and physical therapy education.
2. Identify, explain, and implement management strategies that are grounded in leadership principles, institutional strategic planning documents, and knowledge of the environment of higher education.
3. Demonstrate leadership behaviors that are authentic, grounded in institutional and professional values, and achieve the intended results.
4. Justify/explain decisions and actions to others based on an understanding of the academic administrator's responsibilities, a sense of duty to represent faculty and students, and alignment congruent with institutional values, priorities and directives.
5. Apply proven negotiation/conflict resolution methods and time management techniques to daily administrative challenges.

Agenda:

Topic	Minutes
Required readings (listing found in resources):	1200
Introduction and Overview:	15
Section 1:	35
Section 2:	25
Section 3:	45
Section 4:	30
Section 5:	50
Posttest:	60
Journaling Assignments	240
Discussion Forum Postings	120
Activities/Reflective exercises	320
	Total Minutes = 2140
	Minutes divided by 60 = 3.5666
	Total = 3.6 CEUs

Brief Presenter Biography:

Dr. Nancy Hall is a David Ross Boyd Professor Emeritus from the University Of Oklahoma College Of Medicine. During her 31 year tenure at the University of Oklahoma, she had RO1 NIH funding for the first 12 years in the Department of Pathology and then was appointed to the Dean's Office staff as Assistant Dean of Admissions. Over the years, she had oversight of the admissions process (27 years), student affairs (14 years), was co-director of the Health Center Faculty Leadership program (18 years), and served most recently as associate dean for academic affairs (11 years) for the college. Throughout her administrative responsibilities, she taught the respiratory system in the pathology course and started and directed the college course on professional ethics. Her parting gift to the college was a new curriculum for the four years of medical education. At the national level, she served on over 22 teams conducting site surveys of medical schools for accreditation by the U.S. Department of Education. During her career she served as a bridge to community activities. A graduating resident award in Pathology for community outreach is in her name as is a scholarship for a graduating senior medical student. In addition to teaching, research, and service, Hall participated in city, state, and national leadership training and from 2009 to the present has served as the state Leadership Oklahoma program director designing and implementing ten modules of leadership training for leaders across the state.

Hall's current activities include teaching active duty military in the University of Oklahoma doctoral programs (International Relations) on military bases throughout the world, serving as a team member for Liaison Committee for Medical Education site survey teams, consulting with new medical schools designing their curriculum, and serving as a trustee for the American Red Cross, the Arts Council of OKC, and Leadership Oklahoma.

Course Content/Outline:***Section 1 – Contemporary Leadership Theories***

- ✓ Stop and Think: Personal Reflection on Leadership (slide 6)
- ✓ Assignment: Personal Reflection on Leadership (slide 7)
- ✓ Stop and Think (slide 12)
- ✓ Stop and Think: Modeling the Way (slide 14)
- ✓ Stop and Think: Challenging the Process (slide 19)
- ✓ Stop and Think: Enabling Others to Act (slide 21)
- ✓ Stop and Think: Encouraging the Heart (slide 23)
- ✓ Assignment: The Five Practices Model (slide 24)

Section 2 – Management Strategies

- ✓ Stop and Think: Leadership and Management – Global Consideration (slide 2)
- ✓ Stop and Think: Leadership and Management – Global Consideration (slide 8)
- ✓ Stop and Think: Leadership versus Management – Personal Considerations (slide 9)
- ✓ Stop and Think: Your Role (slide 10)
- ✓ Stop and Think: Evaluate Your Environment (slide 12)
- ✓ Assignment: Challenge in Your Academic Environment (slide 13)

Section 3 – Leadership Behaviors

- ✓ Stop and Think: Trust as a Leadership Behavior (slide 5)
- ✓ Writing Assignment: Personal Qualities You Admire (slide 8)
- ✓ Stop and Think: Personal Characteristics (slide 10)
- ✓ Stop and Think: Self Trust (slide 14)
- ✓ Stop and Think: Relationship Trust (slide 16)
- ✓ Stop and Think: Organizational Trust (slide 18-19)
- ✓ Stop and Think: Market Trust (slide 21)
- ✓ Stop and Think: Societal Trust (slide 23)
- ✓ Assignment: Trust (slide 25)

- ✓ **Discussion Forum: Peer Activity (slide 26)**

Section 4 – Responsibilities, Advocacy, and Change

- ✓ Stop and Think: Faculty Advocacy (slide 7)
- ✓ Stop and Think: Strategic Planning (slide 11)
- ✓ Stop and Think: Change in Leadership (slide 13)
- ✓ Stop and Think: Economic Changes (slide 14)
- ✓ Assignment (slide 16)
- ✓ **Discussion Forum: Peer Activity (slide 17)**

Section 5 – Application of Leadership and Management to Change

- ✓ Assignment: Negotiation (slide 16)
- ✓ **Discussion Forum: Peer Activity (slide 18)**
- ✓ Stop and Think: Time Management (slide 20)
- ✓ Stop and Think: Meetings (slide 27)
- ✓ Assignment : Application of Management and Leadership (slide 28)

References:

1. Kouzes JM and Posner BZ. The Leadership Challenge: How to Make Extraordinary Things Happen in Organizations. 5th Edition. San Francisco, CA: Jossey-Bass; 2012.
2. Covey SMR. The Speed of Trust: The One Thing That Changes Everything. New York: Simon and Schuster Free Press; 2008.
3. Fisher R, Ury W. Getting to Yes Negotiating Agreement Without Giving in. Random House. 2012.
4. Kouzes JM, Posner BZ. The Leadership Challenge: How to Make Extraordinary Things Happen in Organizations. 5th Edition. San Francisco, CA: Jossey-Bass; 2012. (Section 1)
5. Covey SMR. The Speed of Trust: The One Thing That Changes Everything. New York: Simon and Schuster Free Press; 2008. (Section 3)
6. Fisher R, Ury W. Getting to Yes: Negotiating Agreement Without Giving In. New York: Random House; 2012. (Section 5)

Posttest:

1. The budget situation for the coming year is grim. There will be at least a 3% reduction in available new funds. The decisions being made consider several days of leave without pay for the faculty, reduction in workforce, and reduction in faculty support. The leadership is asking for faculty input. You give thoughtful consideration to each response. You must include consideration of: (Module 3/Objective 1)
 - a) **The characteristics of the leader, behaviors of the followers, and the situation**
 - b) Your personal circumstance of needing a raise
 - c) The staff and their feelings
 - d) The plan for next year

2. Leadership styles can be effective in many cultures (business, health care, academics, etc.) and are driven by personality and group practices. (Module 3/Objective 1)
 - a) **True ***
 - b) False

3. In the Kouzes and Posner model of leadership, a leader must model the way, share a vision, and challenge the current processes to enable others to act. They must forge agreement by: (Module 3/Objective 1)
 - a) Identifying the followers
 - b) **Identifying common principles and ideals**
 - c) Personalizing all decisions
 - d) Getting followers to respect them

4. The most important attribute of a leader is that he/she: (Module 3/Objective 1)
 - a) Is a good manager
 - b) Is able to plan ahead.
 - c) **Is a person of integrity.**
 - d) Has a vision

5. Leadership is: (Module 3/Objective 1)
 - a) **A reciprocal process between leaders and followers.***
 - b) A quality you are born with
 - c) Able to achieve a goal by him/herself
 - d) An ability to establish a quorum at meetings

6. Leadership is an important role requirement for managers, but managerial work is different. (Module 3/Objective 2)
 - a) **True**
 - b) False

7. A good manager, in contrast to a good leader, must: (Module 3/Objective 2)
 - a) share a vision
 - b) empower others
 - c) be accountable
 - d) **be time efficient**

8. Both leaders and managers are problem solvers and decision makers. (Module 3/Objective 2)
 - a) **True**
 - b) False

9. Leaders who are effective should address the culture when trying to create change. (Module 3/Objective 2)
 - a) **True**

b) False

10. In terms of achieving goals, leaders are more important than managers. (Module 3/Objective 2)

- a) True
- b) False**

11. Trust has been eroded as evidenced by the many examples of big business (car industry, banks, etc) failing to use and implement good policies and business plans. This is a good example of the lack of: (Module 3/Objective 3)

- a) Self-reliance
- b) Relational trust
- c) Societal trust**
- d) Consistency

12. Some leaders lose credibility because they are not teaching or practicing their discipline. This demonstration of competence is required to develop trust. (Module 3/Objective 3)

- a) True**
- b) False

13. Ethical leadership is a major societal concern in 2011. (Module 3/Objective 3)

- a) True**
- b) False

14. You have been asked to lead a study of the departmental teaching programs. The main issue is whether to consider developing a doctoral degree program. You accept with hesitation. You have more enthusiasm and become committed as time progresses. Things that may help you broach this task: (Module 3/Objective 3)

- a) You gain confidence in your ability to handle the task (self-trust).**
- b) You probably will delegate much of the responsibility.
- c) Your assistant is very competent in scheduling meetings.
- d) There are committed faculty who will help you.

15. Consistent behavior is the key principle in establishing relationship trust. (Module 3/Objective 3)

- a) True**
- b) False

16. Your new department chair requests progress reports from faculty two times a year. You think your annual evaluation should suffice. With your new knowledge of leadership, why might the chair have a legitimate request? (Module 3/Objective 4)

- a) Administrators have an obligation to monitor the institutional environment including its workforce.**
- b) b) There are faculty who need to be fired.
- c) c) Administrators must be aware of the amount of work being accomplished.
- d) It is busy work.

17. You want to develop a new course and you are excited about it. Your department leader has expressed hesitation about increasing teaching responsibilities. To complicate your life, there is another institution in the immediate area that is starting a new degree program that duplicates yours. You will want to approach your department leader and: (Module 3/Objective 4)

- a) Discuss the economic environment of your department
 - b) Share the new curriculum
 - c) Explore the priorities of the leader**
 - d) Get guidance on how to recruit students to your course
18. You have a new chair of your department. In preparation for her first faculty meeting, she requests that each of the faculty review the strategic plan dated 2009. What is your response? How might you assist her in establishing her own vision for the department? (Module 3/Objective 4)
- a) A strong strategic plan can weather a major change in resources and in the economy, so you go along with her request.
 - b) You e-mail her and let her know the plan is outdated and won't work in the current environment.
 - c) You offer assistance in reviewing the old document and with establishing her vision.**
 - d) You skip the faculty meeting.
19. Who in the academic hierarchy serves as the advocate for the department's interests? (Module 3/Objective 4)
- a) The degree program
 - b) The students
 - c) The administrator**
 - d) The research programs
20. The well-regarded dean of the college has announced his retirement. A search committee is being formed to identify candidates for further consideration by the university's trustees. They will make the final decisions. You are concerned because: (Module 3/Objective 4)
- a) You will have no vote.
 - b) A change in leadership can change the vision for the institution.**
 - c) You don't get to serve on the committee.
 - d) Change makes you nervous.
21. You need to confront a colleague about space. Your department has assigned space based on grant support, and you need just a little space to run several experiments before applying for funding. You know you are awkward in these sorts of situations. What should you do? (Module 3/Objective 5)
- a) You need to practice the negotiation with an uninvolved friend.**
 - b) Trust your ability to overcome being tongue-tied.
 - c) Talk to your colleague's graduate student and see if space is available.
 - d) Request the space directly from your chair.
22. One of your colleagues is funded by a grant supported by the institution and is leaving the campus to pursue other interests. Your chair is searching for the right person to take over the leadership of the grant and be the primary investigator. You want to help out, but you are overly busy even without the grant. What should you do? (Module 3/Objective 5)
- a) Consider whether the grant would advance your career.
 - b) Conduct a personal time management study to see if there actually would be time to do the job well.**
 - c) Figure out how many meetings you would need.
 - d) Just volunteer – things will work out.
23. You are in conflict with one of your colleagues. It is a very competitive atmosphere and yet you wish to accommodate some of the concerns of your colleague. How might you do that? (Module 3/Objective 5)
- a) Use the Thomas-Kilmann Conflict Resolution style to compromise.**
 - b) Continue competing at a high level.

- c) Write a letter to your colleague stating your goals.
 - d) Enlist the aid of a more powerful person.
24. You are entering a negotiation to see which of 2 investigators (you or your colleague) will be listed first on an important publication. Before going into the negotiation, you establish the parameters by which you will accept being second author. This is an example of: (Module 3/Objective 5)
- a) Meeting your colleague half-way
 - b) Being foolish – you know you should be first author
 - c) Negotiating with integrity
 - d) **Identifying the problem in Quadrant I and being realistic about worst case scenarios.**
25. A meeting is scheduled for 4:00 to 4:45 pm this afternoon. How might you assist the chair of the meeting in making this one efficient? (Module 3/Objective 5)
- a) **Request an agenda for the meeting, and ask who will be attending and the purpose of the meeting.**
 - b) Prepare yourself by reading the minutes from the last meeting.
 - c) Insist that the meeting be longer for full discussion.
 - d) Request that the meeting be delayed until after 5:00 pm so attendance might improve.

Course Title: ELI: Module 4: Student Affairs

Category: Online

CEUs: 3.1 CEUs/ 31 contact hours/CCUs (including assessment)

Level of Audience: Basic to Intermediate

Description:

This module has been developed with the question “What should an academic leader know about the many roles, responsibilities, and activities of Student Affairs and how Student Affairs supports the institution’s mission?” in mind.

Colleges and universities may structure their Student Affairs divisions differently, but the same primary responsibilities must still be met. This module is not intended to make you a Student Affairs professional, but it will address major issues and concepts about which a dean must be knowledgeable in his or her role.

This familiarity will enable you to make well-informed decisions, provide vision for the college or division, and support students. It is expected that you will approach this module using the new perspectives and information gleaned from the prior modules in the ELI Fellowship.

Learning Objectives:

After completing this course you will be able to:

1. Examine typical Student Affairs activities, relationships formed within the academic environment, and the overall contribution of Student Affairs to a holistic educational experience.
2. Evaluate the concepts and components of a strategic enrollment management (SEM) process that is defensible and congruent with the institution and program missions.
3. Explain the purpose of different Student Affairs functions in relation to SEM, as well as institutional leader and faculty interactions with these functions.
4. Identify and use the resources and procedures needed to help manage a wide variety of student needs and issues including, but not limited to, student academic progress, reasonable accommodations, students in crisis, and inappropriate or unprofessional behaviors.
5. Discuss federal regulations and considerations in establishing standards, policies, and procedures related to student admissions, enrollment, conduct, and progress.

Course Agenda:

Required readings (listing found in resources):	1000 minutes
Introduction and Overview:	35 minutes
Section 1:	45 minutes
Section 2:	50 minutes
Section 3:	55 minutes
Section 4:	60 minutes
Section 5:	55 minutes
Conclusion:	5 minutes
Posttest:	60 minutes
Journaling Assignments	100 minutes
Discussion Forum Postings	180 minutes
Activities/Reflective exercises/Pre-Test	240 minutes
Total Minutes =	1885 minutes
Total minutes/60 =	31.41
Total CEUs =	3.1 CEUs

Brief Speaker Bio:**Polly Moss - Director, Innovation Alliance**

In 2011, Polly ventured into a new arena in higher education - combining her nearly 30 years of experience in student and academic affairs administration and teaching with higher education's evolving role as a major catalyst in growing the innovation ecosystem. She is currently director, Innovation Alliance with The University of Akron, Lorain County Community College and Stark State College. These three institutions in northeastern Ohio have allied to create the Innovation Alliance, a corridor of educational efficiency, knowledge creation and economic development. By combining selected resources of its partners, the alliance seeks to stimulate economic development and catalyze innovation across all sectors of the corridor – education, government, health care, manufacturing and high-growth industries. Polly assists in implementing these institution presidents' vision by joining the vast resources and strengths of the region to increase innovation, technology transfer, and support for entrepreneurs and new business development through strategic approaches. The alliance also strives to respond to the need of employers for workers of the future by creating degree programs and partnerships to meet the demand for a highly skilled workforce. In 2012, the Innovation Alliance was awarded the Team NEO Award for Regionalism and Cross Border Collaboration.

While working directly in student affairs, Polly's experiences included responsibility and oversight for all areas of student affairs: enrollment management; admissions; financial aid; registrar; student activities and organizations; student government and leadership; student academic progress; student conduct and discipline; career, personal and academic advising; project management; research; teaching; and supervising the implementation of an ERP system. While assistant dean for student affairs and admissions with the Northeastern Ohio Universities Colleges of Medicine and Pharmacy (NEOUCOM) in Rootstown, Ohio, she was instrumental in the start-up of the institution's College of Pharmacy and subsequently recognized with the President and Dean's Award for her involvement in that success. All areas of her work included efforts and initiatives to strategically partner with academic affairs for the total education and development of students. She implemented the multiple mini interview admissions process for the College of Medicine and presented nationally on this innovative admissions practice. While at NEOUCOM, Polly received: the Olson-Blair Award for Administrative Excellence for demonstrating outstanding administrative accomplishments including the ability to supervise, make critical judgments and contributing to the betterment of the College; the Dean's Award for having played a significant role in the growth and development of the College of Medicine's academic program and providing outstanding guidance and leadership; the Gender Equity Award; the Alpha Omega Alpha Recognition Award; and numerous Service to Class awards from graduating classes.

Polly has presented internationally and nationally on topics related to admissions, financial aid, student advising, career development, student academic review and promotions, disabilities, project management, the assessment of student professionalism attributes, the image of women in popular culture, and pan flu preparedness. She has contributed her time and energies to numerous national professional organizations through presentations and committee involvement, including the Association of American Medical Colleges, Association of Student Judicial Affairs, National Association of Student Financial Aid Administrators, Education Law Association, and the International Conference on Education. Her research topics have included factors predicting success of students in the BS/MD program, a correlation of pharmacy and medical student matriculating student questionnaire data with academic performance in school, student awareness and satisfaction with career development activities, the undergraduate experience of students in a combined BS/MD degree program, the relationship between students' academic performance and their ability to manage their finances, the influence of financial aid on student academic performance and persistence in professional school, and a longitudinal study of student awareness, knowledge and satisfaction with financial aid.

Polly completed courses toward a doctorate at Kent State University in educational administration with a focus in education law. She received her master's degree in educational administration from Kent State University and her bachelor of science in organizational communications from Ohio University with minors in psychology and management. She is certified by the Aerobics Fitness Association of America as a group fitness instructor and as an instructor with the Silver Sneakers FLEX program. She teaches low impact aerobics classes with a focus on cardio health, flexibility, strength and balance, in her community. She has a special interest in the images of women in media, media education for young girls. She enjoys scuba diving, running, strength training, skiing, and reading.

Polly's educational philosophy, which served as her guide in student affairs, is below:

Literature has yielded solid, empirical evidence to support efforts within higher education to emphasize a holistic approach to educating students. This includes: offering a beneficial environment that supports the student learning process; and recognizing the value of the information curriculum and student services as learning experiences. It is therefore critical to establish partnerships with units within the institution to form more united efforts in advancing student learning to provide a more powerful overall educational experience for students. Education must provide for the overall development of an integrated sense of identity, thus encompassing all aspects of the educational experience.

Course Content/Outline:***Introduction***

- ✓ Ask yourself if there are other areas, topics, or issues regarding Student Affairs and student development that you'd like to add to the curriculum. (slide 15)
- ✓ If there are topics or issues you would like to add to Module 4, please provide your feedback on Module 4 online assessment and let the Program Director know to begin a list that can be added to subsequent releases of the module. (slide 15)

Section 1 – Student Affairs Roles, Strategic Partnerships, and Contributions to Learning

- ✓ Stop and Think: Student Affairs Function (slide 9)
- ✓ Research and Journaling Activity: Student Affairs at Your Institution (slide 16)
- ✓ Research and Journaling Activity: The Student Affairs Mission (slide 18)
- ✓ Stop and Think: Your Collaboration With Student Affairs (slide 22)

Section 2 – Strategic Enrollment Management

- ✓ SEM Pre-test (slides 3-4)
- ✓ Research and Journaling Activity: SEM at Your Institution (slide 13)
- ✓ Stop and Think Activity: Faculty Involvement with SEM (slide 25)
- ✓ SEM Post-test (slides 29-30)

Section 3 – Mission-Critical Student Affairs Functions

- ✓ Stop and Think/*Discussion Forum*: Which Candidate to Admit? (slides 5-6)
- ✓ Stop and Think: Dealing with the Educational Record (slide 22)
- ✓ Research and Journaling Activity: Financial Aid (slide 28)
- ✓ Research and Journaling Activity: Advising at Your Institution (slide 32)

Section 4 – Student Academic and Professional Progress

- ✓ Stop and Think: Disabilities and Essential Functions (slide 12)
- ✓ Research and Journaling Activity: Essential Standards at Your Institution (slide 15)
- ✓ Stop and Think: The Troubled Student (slide 35)

Section 5 – Policies, Compliance, and Legal Issues

- ✓ Stop and Think: Student Criminal Behavior (slide 12)
- ✓ *Discussion Forum*: Criminal Background Checks (slide 13)
- ✓ Stop and Think: Student Conduct and the Profession (slide 34)

Required Readings:Section 1

- American Association for Higher Education, American College Personnel Association, NASPA: Student Affairs Administrators in Higher Education. *Powerful Partnerships: A Shared Responsibility for Learning*; Washington, DC; 1998. <http://arc.naspa.org/career/sharedresp.cfm>
- American College Personnel Association. Student learning imperative: Implications for student affairs. American College Personnel Association. Washington, DC; 1996. http://www.housing.berkeley.edu/student/ACPA_student_learning_imperative.pdf

Section 2

- Bontrager B. Strategic enrollment management: Core strategies and best practices. *College & University Journal*; 2004; 79(4):9-13. http://www.aacrao.org/Libraries/Publications_Documents/spring2004.sflb.ashx
- Denison, R. and Clinton, B. Utilizing SEM principles to evaluate program effectiveness and viability and bridge the gap between enrollment management and academics. *AACRAO SEM Newsletter*. August 2012. <http://www4.aacrao.org/semsource/sem/index7b79.html?fa=view&id=5575>
- Henderson S. Refocusing enrollment management: Losing structure and finding the academic context. *College & University Journal*; 2005; 80(3):3-8. http://www.aacrao.org/Libraries/Publications_Documents/winter2005.sflb.ashx
- Kerlin C. A community college roadmap for the enrollment management journey. *College & University Journal*. 2008:10-14. http://www.aacrao.org/Libraries/Publications_Documents/CUJ8304.sflb.ashx
- Soares L. The Rise of Big Data in Higher Education. *EDUCAUSE* webcast. March 22, 2012. <http://www.educause.edu/library/resources/rise-big-data-higher-education>

Section 3

- Utzman R, Riddle D, Jewell D. Use of demographic and quantitative admissions data to predict academic difficulty among professional physical therapist students. *Phys Ther*. 2007; 87(9):1164-1180. <http://ptjournal.apta.org/content/87/9/1164.full.pdf+html?sid=d29f6583-a2b9-4d62-a33d-4c9beff69eb4>
- Caldwell C, Shapiro J, Gross S. Ethical leadership in higher education admission: Equality vs. equity. *NAACAC*. 2007. <http://files.eric.ed.gov/fulltext/EJ783947.pdf>
- National Association of Student Financial Aid Administrators. The 2010 NASFAA administrative burden survey. February 2011:1-77. http://www.nasfaa.org/research/News/Administrative_Burden.aspx

Section 4

- Ingram D. Opinions of physical therapy education program directors on essential functions. *Phys Ther*. 1997;77(1):37-45. <http://ptjournal.apta.org/content/77/1/37.full.pdf>
- Francis N, Salzman A, Polomsky D, Huffman E. Accommodations for a student with a physical disability in a professional physical therapist education program. *J Phys Ther Educ*. 2007; 21(2):60-65. http://c.ymcdn.com/sites/www.ipta.org/resource/resmgr/docs/poster_presentations.pdf
- Rangel A, Wittry A, Boucher B, Sanders B. A survey of essential functions and reasonable accommodations in physical therapist education programs. *J Phys Ther Educ*. 2001;15(1):11-19. <http://www.highbeam.com/doc/1P3-72022557.html>
- Fein B. A review of the legal issues surrounding academic dismissal. *J Phys Ther Educ*. 2001; 15(1):20-25. <http://www.questia.com/library/1P3-72022559/a-review-of-the-legal-issues-surrounding-academic>
- Pavela G. Applying the power of association on campus: A model code of academic integrity. *Journal of College and University Law*. 1997;24(1):97-118. http://www.academicintegrity.org/icai/assets/model_code.pdf

Recommended Readings:

- Hossler D, Kalsbeek D. Setting the context for dialogue. *College & University*. 2008. <http://www.depaul.edu/emm/library/authored.asp>
- Mohr T, Ingram D, Fell N, Mabey R. The case for academic integrity in physical therapist education. *J Phys Ther Educ*. 2011;25(2):51-6. http://findarticles.com/p/articles/mi_qa3969/is_201104/ai_n57428594/pg_7/
- Visit the AHEAD web site to learn more about the resources available to higher education regarding disabilities. <http://www.ahead.org/>

References:

1. American Association of Collegiate Registrars and Admissions Officers. College Admission Officer's Guide. Washington, DC; 2009.
2. Bakst D. Major legal challenges for registrars and admissions officers. Michigan Association of Collegiate Registrars and Admissions Officers. <http://www.macrao.org/Meetings/AnnualConference/AnnualConference2010/CLHMajor%20Legal%20Challenges.pdf>. Published November 2010. Accessed 9/15/2013.
3. Bontrager B. Strategic enrollment management: Building institutional vitality. 2004; 79(4):9-13. <http://registrar.iupui.edu/emc/ppt/vitality.pdf>
4. Flanders. Academic Student Dismissals in Academic Student Dismissals at Public Institutions of Higher Education: When is Academic Deference Not an Issue?" Journal of College and University Law. 2007;34(1):19-76. <http://www.educationlawconsortium.org/forum/2007/papers/Flanders2007.pdf>
5. Smith C. Finding the academic context: The SEM role for faculty. AACRAO Consulting; 2009. http://consulting.aacrao.org/publications_events/publications/finding-the-academic-context-the-sem-role-for-faculty/ Accessed 9/15/2013.
6. Wilkinson RB. Strategic Enrollment Management: Creating a Definition That Works. Retention 2007: An International Conference on Student Retention. May 2007. <http://www.educationalpolicy.org/events/R07/documents/StrategicEnrollmentTHURS%20%5bCompatibility%20Mode%5d.pdf>. Accessed 9/15/2013.

Assessment:

1. The student handbook may be considered a contract with a student unless it includes a disclaimer stating otherwise. **T**
2. FERPA allows academic advisors access to a student's educational record if the advisors are included in the institution's definition of having a legitimate educational interest. **T**
3. A statement indicating a person's ability to meet the program's essential functions with or without accommodations should be part of the admissions application. **T**
4. Because of limitations of FERPA, a faculty or staff member cannot report concerns about a student to the institution's counselor. **F**
5. An institution may rescind an offer of admission if it later wants to accept a student with higher academic qualifications. **F**
6. If a student submits documentation of a disability and requests accommodations, the institution must provide those accommodations. **F**
7. Disciplinary dismissal situations should be afforded a higher level of due process than academic dismissals. **T**
8. Student newspaper articles that are critical of school authorities or that are controversial may not be censored by institutional authorities. **T**
9. Students cannot be dismissed without a formal hearing when their performance fails to meet scholastic standards. **F**
10. Institutional policies should allow students to challenge grades and other academic evaluations. **T**
11. A faculty member is authorized to discuss a student's course grade with a parent if the student is claimed as an exemption on the parent's tax return. **F**
12. The "academic record" is synonymous with the "educational record" of a student. **F**
13. Implementing financial aid award policies to meet enrollment goals is acceptable as long as it is not done in a discriminatory manner. **T**
14. Although a faculty member may recognize a student is in "crisis" mode, the faculty is prohibited by law from contacting authorities as the student can then pursue legal action against the institution. **F**

Multiple Choice

15. A criminal background check should be conducted as part of the admission process:
 - A. With the initial admissions application
 - B. After the offer of acceptance is made**
 - C. Prior to an interview
 - D. Never with admissions – after matriculation
16. In what process are all members of the institution expected to contribute to meet institutional mission and goals?
 - A. Capital campaigns
 - B. Student assessment
 - C. Admissions and recruitment
 - D. Strategic enrollment management**
17. Which response below is not a purpose of research in SEM?
 - A. To improve retention
 - B. To increase funding for student government**
 - C. To build a model for enrollment projections
 - D. To recommend changes to financial aid award policies
18. Which of the following items is not considered part of the educational record for a student:
 - A. A counselor's notes on a session with a student**
 - B. Disability accommodations for a student
 - C. Test scores a student earned in class
 - D. Academic dismissal records
19. This tool uses the characteristics of students who have chosen an institution in the past to predict which prospective students will enroll in the future:
 - A. SEM
 - B. Predictive modeling**
 - C. Recruitment and marketing
 - D. Merit scholarships
20. "Price elasticity" in SEM refers to:
 - A. Tuition discounts

- B. Comparison with other “like” institutions and their tuition figures
 - C. What the market will bear**
 - D. Increasing net revenue
21. The model for academic advising where professional or faculty advisors are located in their respective academic departments is:
- A. A shared model
 - B. A decentralized model**
 - C. A centralized model
 - D. A two-tiered model

Course Title: ELI: Module 5 - Legal and Policy Issues
Category: Online
CEUs: 4.4 CEUs/44 contact hours/CCUs (with posttest)
Level of Audience: Intermediate

Description:

A comic strip character told his boss that to follow through on the task he was given might result in his being executed for treason, whereupon the boss said for him to talk to the legal department. After a brief reflection on that direction, the employee asked the boss if he could opt for the execution instead.

Having to wrestle with legal issues need not be that daunting. Module 5 is not designed, nor will it make any attempt be made, to provide definitive answers to specific legal issues or problems. That is essentially the domain of the legal counsel and ultimately the courts. What Module 5 will attempt, using a case study approach, is to provide some examples of legal issues related to day-to-day academic decision making so that you might be better able to recognize the existence of a legal problem, analytically think through a situation, and seek the necessary assistance and guidance.

Learning Objectives:

After completing this course you will be able to:

1. Describe the general precepts for the documentation of controversial matters (Section 1).
2. Recall the principles and concepts underlying risk management practices as well as the risk management processes and procedures for your institution (Section 2).
3. Identify and describe the necessary components of an affiliation agreement, using a provided sample agreement (Section 3).
4. Summarize and apply your institution's grievance policies and procedures (Section 4).
5. Describe and analyze the limits that can, and in some instances must, be placed on religious activity by students and faculty related to their academic activity (Section 5).
- 6a. Evaluate the expanse and limits of the principles of academic freedom as they apply to faculties' performance of their duties and students' academic performance (Section 6).
- 6b. Describe and assess the institution's authority to make determinations about the manner in which it operates and the content and conduct of its academic programs (Section 6).
- 6c. Explain to students and faculty the scope of their respective academic freedom, including its limitations (Section 6).
- 7a. Assess the extent of the rights of and limits on students' freedom of speech (Section 7).
- 7b. Examine the rights and limits on faculties' (employees') freedom of speech in their roles as employees and in their personal lives (Section 7).
- 7c. Determine what constitutes hate speech and recall the sanctions available when such speech is used by students or faculty (Section 7).
- 7d. Know the need for immediate and comprehensive action when faced with a situation involving hate speech (Section 7).
8. Recognize the situations in which you need to consult with your immediate administrative supervisor to request a consultation with the institution's legal counsel (Section 8).
- 9a. Analyze the nature, extent, and limits of your institution's indemnification of its employees and students engaged in clinical training (Section 9).
- 9b. Explain the limited circumstances under which you may have exposure to personal liability (Section 9).

Course Agenda:

Topic	Minutes
Required readings (listing found in resources):	1501
Introduction and Overview:	30
Section 1:	30
Section 2:	30
Section 3:	30
Section 4:	30

Section 5:	30
Section 6:	60
Section 7:	60
Section 8:	60
Section 9:	60
Posttest:	60
Journaling Assignments	120
Discussion Forum Postings	110
Activities/Reflective exercises/Pre-Test	450
	Total Minutes = 2661
	Total minutes/60 = 44.35
	Total CEUs = 4.4

Brief Speaker Bio:**Steve Milam, JD**

For over 30 years, Steve Milam served as an assistant attorney general for several Washington state public institutions of higher education, the last 23 years of which were at the University of Washington. He was a senior counsel and assistant attorney general for the University of Washington Health Sciences and Medical Centers. His clients included the University of Washington Schools of Dentistry, Medicine (including the Division of Physical Therapy), Nursing, Pharmacy, Public Health and Community Medicine, and Social Work, as well as Harborview Medical Center and University of Washington Medical Center and Airlift Northwest.

Currently, Milam is an affiliate assistant professor in the Department of Bioethics and Humanities for the University of Washington School of Medicine and is in private practice as an attorney and consultant on issues related to higher education and health law. Milam is an adjunct professor teaching Higher Education Law, for the Student Development Administration Program at Seattle University College of Education. He is also a part-time lecturer teaching the End-of-Life seminar for the University of Washington School of Law.

Milam is a graduate of Washington State University and obtained his legal education at the University of Oregon. He is a past president of the Washington State Society of Healthcare Attorneys and a past member of the Board of Directors of the National Association of College and University Attorneys.

Milam has made presentations throughout the United States on a variety of medical, legal, and education topics during his career, including to audiences of physical therapy educators. His articles on legal issues related to the evaluation of student clinical performance and academic dismissal have been published in the New England Journal of Medicine, Academic Medicine, Journal of College and University Law, Journal of Law and Ethics in Dentistry, and Perspective on Physician Assistant Education (former title of the Journal of Physician Assistant Education).

Course Content/Outline:***Section 1 – Controversy Documentation: E-mail, Voicemail, and Disclosure Issues***

- ✓ Research Activity: Identify and Review Document Retention Policies (slides 5 and 6)
- ✓ Journaling Activity: Case 1 Next Steps (slide 10)
- ✓ Activity: Reflecting on Communication Best Practices (slide 12)
- ✓ Research Activity: Requests for Records (slide 17)
- ✓ Research Activity: Assignments (slide 19)

Section 2 – Risk Management

- ✓ Research Activity: Review Risk Management Policies and Incident Forms (slides 5 and 6)
- ✓ Activity: Case 2 Reflection (slide 8)
- ✓ Journaling Activity: Considering Other Related Issues (slide 15)

Section 3 – Affiliation Agreements

- ✓ Research Activity: Review Affiliation Agreements (slide 4)
- ✓ Activity: Reflecting on Authority Over Student-Related Matters (slide 11)
- ✓ Research Activity: Review Background Check Policies (slide 14)
- ✓ *Discussion Forum: Background Checks (slide 17)*
- ✓ Research Activity: Review Policies Regarding Exposure to Infectious Fluids (slide 19)
- ✓ Activity: Documenting Biohazard Policies in the Affiliation Agreement (slide 22)
- ✓ Research Activity: Review Policies Regarding Paid Positions at Clinical Education Sites (slide 26)
- ✓ Assignments: Section 3 (slide 30)

Section 4 – Faculty and Student Grievances and Misconduct

- ✓ Research Activity: Review Grievance Policies and Procedures (slides 6 and 7)
- ✓ Activity: Reflecting on Jane’s Communications (slide 8)
- ✓ *Discussion Forum (slide 13)*
- ✓ Activity: Reflection Question (slide 16)
- ✓ Journaling Activity: Drafting a Letter of Violation to Jane (slide 22)
- ✓ Activity: Reflecting on Jack’s Sanctions (slide 28)
- ✓ Journaling Activity: Writing a Letter to Jack (slide 30)
- ✓ *Discussion Forum: Releasing Education Records (slide 33)*
- ✓ Journaling Activity: Considering the Case in a New Light (slide 39)
- ✓ Assignments for Case 1 (slide 40)

Section 5 – Religious Freedom Issues

- ✓ Research Activity: Review Policies and Laws Related to Religious Activities on Campus (slides 7 and 8)
- ✓ Reflective Activity: Consider Sam’s Free Exercise Rights (slide 13)
- ✓ Reflective Activity: Inquiring About Patients’ Spiritual Needs (slide 18)
- ✓ Journaling Activity: Respond to Sam’s and Martha’s Cases (slide 21)
- ✓ *Discussion Forum: Considering Your State Constitution (slide 22)*
- ✓ Activity: Reflecting on Blanket Prohibitions (slide 28)
- ✓ Activity: Reflecting on Classroom Prayer Within a Private Institution (slide 33)
- ✓ Journaling Activity: Respond to Tom (slide 36)
- ✓ *Discussion Forum: Discuss Crystal’s Plans to Wear Burqa (slide 38)*

Section 6 – Academic Freedom: The Institution, Faculty, and Students

- ✓ Research Activity: Review Academic Freedom Policies and Resources (slides 10 and 11)
- ✓ Activity: Recalling the 3 Tenets of Faculty Academic Freedom (slide 17)
- ✓ Activity: Revisiting Lawsuit 1 Reflection Question (slide 27)
- ✓ Activity: Reflecting on Pete’s Lawsuit from 2 Perspectives (slide 31)
- ✓ Journaling Activity: Write a Letter to Pete (slide 38)
- ✓ Journaling Activity: Write a Letter to the 3 Students (slide 41)
- ✓ Research Activity: Refusing to Counsel a Patient/Client on Religious Grounds (slide 42 and 43)
- ✓ Research Activity: Is the State Legislature the Ultimate Arbiter of Academic Freedoms? (slide 51)
- ✓ Journaling Activity: The Student Refusing to Treat a Patient on Religious Grounds (slide 54)
- ✓ Activity: Revisiting Case 10: Objections to New Admissions Process (slide 61)

Section 7 – Freedom of Speech and Hate Speech

- ✓ Research Activity: Review Freedom of Speech and Hate Speech Sources (slides 10 and 11)

- ✓ Journaling Activity: Write a Letter to Fred (slide 25)
- ✓ Journaling Activity: Write a Letter to Thelma (slide 30)
- ✓ Journaling Activity: Responding to the Case of Doyle, the Outspoken Student (slides 31-33)
- ✓ *Discussion Forum: Determining Who Is the Disruptor (slides 66 and 67)*

Section 8 – Working With Institutional Legal Counsel

- ✓ Research Activity: Review Definitions and Policies Related to Legal Counsel (slides 10 and 11)
- ✓ Activity: Preparing for a Meeting With Your Legal Counsel (slide 22)
- ✓ Activity: Create a Notebook (slide 33)
- ✓ Research Activity: Review Policies and Procedures and Meet With Your Legal Counsel (slide 38-39)

Section 9 – Liability of Employees, Faculty, and Administrators

- ✓ Research Activity: Review Liability- and Indemnification-Related Policy (slide 6)
- ✓ Activity: Reflecting on Case 18 (slide 14)
- ✓ *Discussion Forum: Discuss the Theft of John's Computer (slide 20)*
- ✓ Research Activity: Applying the Rules (slide 27)
- ✓ Stop and Think: Negligent Supervision (slide 37)
- ✓ Activity: Liability Examples (slide 41)

References:

1. Cheryl A. Cameron, Laura E. Meyers & Steve G. Olswang, Academic Bill of Rights: Conflict in the Classroom, 31 *Journal of College and University Law* 243 (2005).
2. Kaplin WA, Lee BA. *The Law of Higher Education. Student version, 4th Edition.* [e-book] Hoboken, NJ: Jossey-Bass; 2010.
3. Kaplin WA, Lee BA. *The Supplement to A Legal Guide for Student Affairs Professionals. 2nd Edition.* [e-book] Hoboken, NJ: Jossey-Bass; 2011.
4. Kaplin WA, Lee BA. *The Law of Higher Education. 2 volumes, 4th Edition.* Hoboken, NJ: Jossey-Bass; 2006.
5. Kaplin WA, Lee BA. *The Supplement to A Legal Guide for Student Affairs Professionals. 2nd Edition.* Hoboken, NJ: Jossey-Bass; 2011.

Course Title: ELI: Module 6 – Human Resources Management

Category: Online

CEUs: 3.9 CEUs/39 contact hours/CCUs (with posttest)

Level of Audience: Intermediate

Description:

This module will also examine the employment cycle, including the highly competitive recruiting market for faculty; total compensation and rewards; faculty and staff relations, including workload matters, tenure, institutional governance, and collegiality; changing demographics; health and productivity management; the legal and compliance aspects of human resources management; and, related policies and procedures.

This course will show you, an academic leader, the profession and function of higher-education human resources; what differentiates higher-education human resources from private practice human resources; and, how to effectively partner with your chief human resources officer and her or his team.

Learning Objectives:

After completing this course you will be able to:

1. Explain the evolution of the profession of human resources and how that evolution has affected higher education in the United States. (Section 1)
2. Evaluate the components of the talent management processes for faculty and staff in a higher-education environment, and evaluate the efficacy of the faculty and staff promotion process. (Section 2)
3. Recall the definition of total compensation and create a total compensation flow chart for your institution. (Section 3)
4. List and describe the features of effective employee relations strategies, programs, and initiatives for faculty and staff; and repeat and recall the various issues associated with workload matters, tenure, institutional governance, and collegiality. You will also be able to discuss matters related to unions and union relations.. (Section 4)
5. Describe the various factors that influence a multigenerational workplace. You will be able to recall the effects these factors have on human resources programming. You will also be introduced to the changing demographics of the professorate, the future supply shortage within the academic leadership pipeline, and managerial steps that can positively impact it. (Section 5)
6. Evaluate the elements of effective health and productivity measures – measures that reach beyond traditional medical and fringe benefits packages. These will include wellness-related components as well as work-life practices. (Section 6)
7. Deeper appreciation for the major employment-related case laws and legislation that impact the higher education environment. (Section 7)
8. Evaluate the various structural features and aspects of a college or university strategic plan, including organization development, workforce development, succession planning, diversity programming, and workforce planning programs. (Section 8)
9. Recall and articulate the policies and procedures necessary to partner effectively with your human resources office. (Section 9)

Course Agenda:

Section	Minutes
Introduction and Overview	20
Section 1 - History and Evolution of Higher-Education Human Resources Management	25
Section 2 – Talent Management Process	40
Section 3 – Total Compensation Concepts	35
Section 4 – Employee Relations Practices	40
Section 5 – Changing Demographics in the Education Workforce	25
Section 6 – Health and Productivity Management	35
Section 7– Legal and Compliance Issues	35
Section 8 – Strategic Planning	30
Section 9 – Policies and Procedures for Human Resources Officers	30

Summary and Closing	10
Journaling Assignments	150
Discussion forum Postings & Virtual Office Hours	150
Required Reading	1631
Posttest	60
	Total Minutes = 2316
	Minutes divided by 60 = 38.6
	Total = 3.9 CEUs/39 contact hours

Brief Speaker Bio:

James E. Kemper, PhD is the director of human resources at Zane State College in Zanesville, Ohio. Prior to joining Zane State, Kemper was the director of human resources for Longaberger Inc and director of organization and human resource consulting for The Ohio State University. He also was associate vice president and chief human resources officer at Ohio University for over 20 years. Kemper also has worked for the Anchor Hocking Corporation and as an independent consultant. He has held adjunct teaching roles for Ohio University's College of Business Administration and for Hocking College.

Dr Kemper has bachelor and master degrees in business administration from Ohio University and an SPHR lifetime certification from the Human Resource Certification Institute in Washington D.C. He received his PhD in higher education administration from Ohio University in 2001. His dissertation, which has been replicated twice, was titled "The Role of the Human Resource Office in the Collegiate Environment: Identifying the Components of Being a Strategic Partner."

He has published numerous human resources-related articles in trade journals including The Higher Education Workplace, The Business Officer, and Capacity.

Kemper is a member of The Society for Human Resource Management (SHRM) and the College and University Professional Association for Human Resources (CUPA-HR).

He and his wife, Jenny, have 4 grown children and 9 young grandchildren.

Course outline:***Section 1 – History and Evolution of Higher-Education Human Resources Management***

- ✓ Research Activity: Applied History (slide 3)
- ✓ Stop and Think: Personnel Administration Course (slide 6)
- ✓ Stop and Think: Evolution of Human Resources (slide 11)

Section 2 – Talent Management Process

- ✓ Research Activity: Talent Management (slide 3)
- ✓ Research and Journaling Activity: Talent Management Process at Your Institution (slide 4)
- ✓ Stop and Think: Recruiting (slide 9)
- ✓ Stop and Think: Staffing and Recruiting (slide 11)
- ✓ Journaling Activity: Talent Management Processes (slide 19)

Section 3 – Total Compensation Concepts

- ✓ Interview Activity: Total Compensation (slide 3)
- ✓ Research and Journaling Activity: Total Compensation (slide 5)
- ✓ Stop and Think: Total Compensation (slide 11)
- ✓ Stop and Think: Extrinsic and Intrinsic Rewards (slide 15)

Section 4 – Employee Relations Practices

- ✓ Required Activity: Employee Relations (slide 5)
- ✓ Stop and Think: Employee Relations at Your Institution (slide 7)
- ✓ Stop and Think: Communication Programs (slide 10)
- ✓ Stop and Think: Participatory Management (slide 12)
- ✓ Stop and Think: Tenure (slide 17)

Section 5 – Changing Demographics in the Education Workforce

- Stop and Think: Demographic Changes (slides 8 - 9)
- Journal Activity: Collect Demographic Data (slide 10)

Section 6 – Health and Productivity Management

- ✓ Stop and Think: Performance Management (slide 4)
- ✓ Stop and Think: Health Management/Wellness (slide 6)
- ✓ Research and Journaling Activity: Health Management at Your Institution (slide 7)
- ✓ Stop and Think: Defining Productivity Management (slide 8)
- ✓ Stop and Think: Culturally Appropriate Evaluation (slide 11)
- ✓ Stop and Think: Your Productivity Management (slide 13)
- ✓ Research and Journaling Activity: Productivity Management at Your Institution (slide 14)

Section 7– Legal and Compliance Issues

- ✓ Stop and Think: Legal Issues (slide 5)
- ✓ Stop and Think: Legal Issues (slide 7)
- ✓ Stop and Think: Legal Issues (slide 9)
- ✓ Stop and Think: Compliance (slide 13)
- ✓ Research and Journaling Activity: Legal and Compliance Issues (slide 14)

Section 8 – Strategic Planning

- ✓ Required Reading: Reflection and Journaling (slide 4)
- ✓ Required Reading: Reflection and Diversity (slide 5)
- ✓ Required Reading: Reflection, Journaling, and Workforce (slide 6)
- ✓ Research Activity: Your Institution’s Plan (slide 9)
- ✓ Research Activity: Applying the Diagnostic Tool (slide 10)
- ✓ Stop and Think: The HR Strategic Plan (slide 14)

Section 9 – Policies and Procedures for Human Resources Officers

- ✓ Required Activities: Information Search, Reading, and Journaling (slides 3 and 4)
- ✓ Journaling Activity: Policies and Procedures (slide 5)
- ✓ Stop and Think: Comparing Policies and Practices (slide 6)
- ✓ Stop and Think: Policies (slide 12)
- ✓ Discussion Forum: Questions (slide 13)
 - In what ways do members of the Human Resources staff partner with your office?
 - How is the office of Human Resources at your institution considered a strategic partner?
 - What would you say are the 1-to-3 salient issues that Human Resources at your institution need to address over the coming year? Why?

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Justification of Calculated Hours

The American Physical Therapy Association is approved as an Authorized Provider (#380) by the International Association for Continuing Education and Training (IACET), 1760 Old Meadow Road, Suite 500, McLean, VA 22102. Determination of calculated hours is made by calculating the number of words in the article. Calculation of hours: The hours were calculated in part based on reading rate. An accepted rate of reading in words per minute (wpm) for “learning” is between 100 and 200 wpm, 100 wpm was used for the calculations. Time that is calculated as thirty minutes or longer is rounded up. The total amount of words is divided by 100 which in turn are then divided by 60 to obtain the total number of CEUs for readings. Calculations are also projected based off of estimated time to complete case study questions throughout the course presentation.

Posttest questions are calculated as follows:

Fifteen questions are equal to thirty minutes of continuing education and twenty five questions are equal to sixty minutes of continuing education.

The total number of minutes for the educational content and the time allotted for posttests are calculated and divided by sixty. This total is then divided by ten to obtain the total continuing education units (in tenths).

Posttest:TRUE/FALSE

1. The evolution of HRM has followed the history of business in the U.S. T/1 (answer/section)
2. The first known college course in personnel administration was taught in 1920 by Ordway Tead at Columbia University. T/1
3. A talent management plan includes provisions or processes for determining who to move into an organization through recruitment. T/2
4. The ultimate goal of an effectively designed total compensation plan is to attract, retain, and motivate top quality faculty and staff. T/3
5. The direct compensation of a total compensation plan includes medical insurance. F/3
6. Employee relations involve the provisions of fair and consistent treatment to all faculty and staff so they will be committed to the organizations goals. T/4
7. An effective employee relations program is marked by common elements or similar ingredients. The notion of an effective communications strategy is NOT included in the program. F/4
8. Unions now represent about one-quarter of all full-time faculty in U.S. colleges and universities. T/4
9. Productivity, or performance management, is the formal, systematic assessment, identification, and measurement of how well faculty and staff are performing in their official capacities in relation to established standards. The process also includes the communication of that assessment to the individuals. T/6
10. According to a 2008 ACE study, permanent junior faculty make up a diminishing share of the professorate, and most of these individuals will not have time to earn tenure (at 4-year institutions and some community colleges). T/5
11. The ACE study noted in number 10 above further recommends there is no need to alter the higher education leadership pipeline to adapt to current demographic realities. F/5
12. Policies help the college or university in being defensible against certain legal actions. T/9
13. According to Rothwell, Prescott, and Taylor, "Strategy is usually defined as the long-term course plotted for an organization." T/8

MULTIPLE CHOICE

14. During which academic year was the College & University Personnel Association (now known as the College & University Professional Association for Human Resources) formed:
 - a. 1919/20
 - b. 1930/31
 - c. **1946/47 (C)/1**
 - d. 2011/12
15. The 4 cultures of the academy, as described by Bergquist (1992) are: collegial, managerial, developmental, and:
 - a. **Negotiating (A)/1**
 - b. Militaristic
 - c. Paternalistic
 - d. Silly nonsense!

16. Recruitment is the process of:
- Determining who to exit from the organization
 - Generating a pool of qualified candidates (B)/2**
 - Finding faculty only
 - Progressive discipline
17. The Civil Rights Act of 1964, including Title VII, directly affects all campuses. It prohibits employment and membership discrimination based on race, color, religion, sex, and:
- Social status
 - Economic income
 - National origin (C)/7**
 - Region of the country where born
18. The Age Discrimination in Employment Act prohibits employment-related discrimination against individuals aged _____ to 65.
- 30
 - 40 (B)/7**
 - 45
 - 50.
19. Productivity management can take on many complex and complicated forms. Which of the following is NOT 1 of these forms?
- Management by objectives
 - 360-degree
 - Culture contracts (C)/6**
 - Behaviorally anchored rating scale
20. Policies normally are developed for the following purposes:
- Satisfy legislative and other mandates
 - Establish workplace expectations
 - Communicate effectively
 - Encourage efficiency
 - Encourage consistency
 - All of the above (F)/9**

Online Course Evaluation



Title: ELI: Module 6 – Human Resources Management

Directions: We value your feedback! Please complete this optional postcourse evaluation and click "submit" after the last question. After you submit the evaluation, please click the "Next" button in lower right-hand corner to reach the course completion page.

Overall Course & Content

Please note: Questions containing an asterisk "*" require a response in order to submit the survey.

***Content matched written description.**

Strongly Agree Strongly Disagree

***Current evidence was cited for specific content.**

Strongly Agree Strongly Disagree

***There was no promotion of a commercial product.**

Strongly Agree Strongly Disagree

***Authors clearly differentiated content based on personal experience, hypothesis, or research.**

Strongly Agree Strongly Disagree

***Course level was appropriate.**

Strongly Agree Strongly Disagree

***Course met my needs.**

Strongly Agree Strongly Disagree

***The overall quality of this course met my expectations.**

Strongly Agree Strongly Disagree

***I selected this course because of the**

- content
- course author
- cost (economical)
- other

If "other" selected above, please explain:

Demographic Information

*I am an APTA member:

Yes No

*I am a certified case manager:

Yes No

*I am a:

- PT
- PTA
- PT Student
- PTA Student
- Other

*Number of years in practice:

- 0
- 1-5
- 6-10
- 11-15
- 16-20
- 21-25
- Over 25

Learning Experience

*I enjoyed learning online.

Strongly Agree Strongly Disagree

*The presentation was easy to use/navigate.

Strongly Agree Strongly Disagree

*Content was organized appropriately.

Strongly Agree Strongly Disagree

*Text was easy to read.

Strongly Agree ● ● ● ● ● Strongly Disagree

***Images enhanced the learning experience.**

Strongly Agree ● ● ● ● ● Strongly Disagree

***I am likely to use the Learning Center to take courses in the future.**

Strongly Agree ● ● ● ● ● Strongly Disagree

***The course/presentation length was:**

- Just right.
- Too short.
- Too long.

*** How long did it take you to complete this course?_____**

***Instructors provided feedback on my learning** **YES** **NO**

*** Objectives were reviewed**

Strongly Agree ● ● ● ● ● Strongly Disagree

*** Presenters identified potential conflicts of interest.**

Strongly Agree ● ● ● ● ● Strongly Disagree

*** Instructional methods were appropriate for content** (example: general lecture, question & answer, group discussion/activities, multimedia)

Strongly Agree ● ● ● ● ● Strongly Disagree

Here is an "open line" to APTA! Please let us know how we can improve our services:

THE AMERICAN PHYSICAL THERAPY ASSOCIATION

*Presents this
Certificate of Completion
To*

[NAME]

For successful completion of the online course entitled

ELI: MODULE 6-HUMAN RESOURCES

And hereby awards 3.9 Continuing Education Units (39 contact hours/CCUs)

*On
[date]*

Paul Rockar Jr.

Paul Rockar, Jr., PT, DPT, MS
President



American Physical Therapy Association

1111 N. Fairfax Street • Alexandria, VA 22314



Approval Code: OHIO:

California:

Pennsylvania State Board of Physical Therapy has recognized APTA as an approved provider of continuing education for this course.

PA evaluative procedures to treat a person without a referral:

The American Physical Therapy Association is recognized by the New York State Education Department's State Board for Physical Therapy as an approved provider of physical therapy and physical therapist assistant continuing education.

Participant License # _____

This course has been approved by the Nevada State Board of Physical Therapy Examiners for ___ units of continuing education.

This activity is provided by the Texas Board of Physical Therapy Examiners Accredited Provider # _____ and meets continuing competence requirements for physical therapist and physical therapist assistant licensure renewal in Texas.

The Ohio Physical Therapy Continuing Education Committee has approved this course for continuing education.

Course Title: ELI: Module 7 – Resources/Financial Management

Category: Online

CEUs: 3.1 CEUs/31 contact hours/CCUs (including assessment)

Level of Audience: Intermediate

Description:

This module addresses the question “What should academic leaders know about financial management to allow them to be active participants in decisions related to resource allocation?”

At the conclusion of the module you will have a clearer picture of the relationship of your unit to the institution. Unit leaders do not live in isolation. Successful department chairs or division chiefs are able to place themselves outside their immediate world.

You will also explore how decisions at the institution level can impact individual programs. Being aware of and able to communicate with your leadership will advance your unit’s goals through alignment with the overall institutional mission and goals.

Learning Objectives:

After completing this course you will be able to:

1. Describe the stream of revenues and expenditures in higher education and how they are managed.
2. Describe the purpose, organization, and content of the various reports that communicate the financial condition of your institution and discuss how these documents are impacted by changing financial scenarios.
3. Describe some of the common tools available to monitor the financial condition of an institution of higher education.
4. Explain the key principles of endowment management, be able to identify the fundamental components of a successful fundraising program, and discuss the link between these 2 activities.
5. Explain how to find grant opportunities for your program and the resources available to assist pre-award and post-award.

Course Agenda:

Section	Minutes
Introduction and Overview	15
Section 1 - Resource Management	80
Section 2 – Financial Statements	120
Section 3 – Tools for Assessing Financial Health	70
Section 4 – Endowment Management and Fund Raising	120
Summary and Closing	10
Journaling Assignments, Research Activities, Stop & Think	220
Discussion forum Postings & Virtual Office Hours	200
Required Reading	1000
Assessment	30
	Total = 1865
	Minutes divided by 60 = 31.08
	Total CEUs = 3.1

Brief Speaker Bio:**Melanie Gehen, MHSA - Vice President and CFO**

Melanie F Gehen is the vice president for academic fiscal affairs at State University New York (SUNY) Downstate Medical Center and interim vice president for finance and CFO. She provides leadership in the provision of financial and business services that enable the medical center to achieve stated academic, clinical and research operational and strategic goals and objectives. Prior to her position at SUNY Downstate she was the associate vice president for health economics at the George Washington University (GWU). She served as the senior advisor on fiscal and administrative matters for the George Washington University Medical Center. She was as a member of the university's Financial Operations Review Group, Policy Steering Committee, and Benefits Advisory Committee. She also was the interim vice provost for medical center finances where she served on the leadership team that was charged with a reorganization of the medical center aimed at strengthening academic and managerial capacity. Prior to her position as associate vice president she served as interim chief financial officer and director of finance for the George Washington University Medical Faculty Associates, a multispecialty group practice. During her tenure she directed the overall financial operations of the group practice. She also has experience in practice group administration and nursing home business operations. She is a member of the American Association of Medical Colleges and National Association of Colleges and University Business Officers. She holds a master's degree in health services administration from GWU and a bachelor's degree from Rochester Institute of Technology. Raised in upstate New York, she currently resides in northern Virginia with her family.

Course Outline:**Section 1 – Resource Management**

- ✓ Stop and Think: Sources of Revenue (slide 17)
- ✓ Stop and Think: Expense Classifications (slide 21)
- ✓ Research and Journaling Activity: Analyzing Fiscal Year Budgets (slide 22)
- ✓ Stop and Think: Planning and Budgeting (slide 29)
- ✓ Stop and Think: Monitoring the Budget (slide 34)
- ✓ Journaling Activity (slides 35-36)
- ✓ Case Study Assignment (slides 37-38)

Section 2 – Financial Statements

- ✓ Research Activity: Your Institutions Financial Statements (slide 14)
- ✓ Journaling Activity: Building an Income Statement (slide 21)
- ✓ Journaling Activity: Building a Balance Sheet (slide 25)
- ✓ Stop and Think: Impacting the Balance Sheet (slide 26)
- ✓ Stop and Think: Impacting Cash (slide 30)
- ✓ Journaling Activity: Building a Cash Statement (slides 31-33)
- ✓ Research Activity: The Annual Report (slide 34)
- ✓ Stop and Think: Budget Lunches (slide 35)

Section 3 – Tools for Assessing Financial Health

- ✓ Research Activity: Applying Ratios (slides 9-10)
- ✓ Research Activity: Working With Scores (slides 21-22)
- ✓ Stop and Think: Assessing Financial Health (slide 25)
- ✓ Research Activity: Analyzing the FIT Report (slides 31-32)
- ✓ Research Activity: CFI and Your Institution (slide 33)

Section 4 – Endowment Management and Fund Raising

- ✓ Research Activity: Endowment Management at Your Institution (slides 19-20)
- ✓ Stop and Think: Your Use of Endowments (slide 29)
- ✓ Research Activity, Part 1: Explore Your Institution's Fundraising Efforts (slide 30)
- ✓ Research Activity, Part 2: Developing a Case Statement (slide 31)
- ✓ Research Activity: Your Program's Effectiveness (slide 36)
- ✓ Journaling Activity: Accreditation (slides 48-50)
- ✓ Journaling Activity: Case Study Questions (slide 51-54)
- ✓ Discussion Forum: Questions (slides 55-56)

References:

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Justification of Calculated Hours

The American Physical Therapy Association is approved as an Authorized Provider (#380) by the International Association for Continuing Education and Training (IACET), 1760 Old Meadow Road, Suite 500, McLean, VA 22102. Determination of calculated hours is made by judging the amount of time for presentation of course content, as well as time to complete course assessment. Educational content calculations are based off of amount of time needed to complete each online module as well as readings, journaling assignments, postings and other educational activities as described in the attached outline.

Assessment questions are calculated as follows:

Fifteen questions are equal to thirty minutes of continuing education and twenty five questions are equal to sixty minutes of continuing education.

The total number of minutes for the educational content and the time allotted for assessments are calculated and divided by sixty. This total is then divided by ten to obtain the final amount of continuing education units.

Attendance Verification:

Our method to verify attendance is to assess learning via a comprehensive, multiple-choice posttest that assesses each learning objective at the end of the course. We require a 70% score to pass and to verify learning. Upon completion of the test, we award CEUs for attendance and achievement of the learning objectives.

Assessment:

1. Variance analysis explains why actual costs are different, either from budgeted values or from prior period actual values.
 - a. **True**
 - b. False

2. What expenditures respond to immediate cost reduction when budgetary variances need to be addressed?
 - a. Fixed
 - b. **Variable**
 - c. Mixed
 - d. All of the above

3. The institution is facing a significant revenue shortfall, and you have been asked to identify unprofitable programs to eliminate. This approach to addressing variances is:
 - a. Strategic
 - b. Performance based
 - c. Formula based
 - d. **a and b**
 - e. All of the above

4. Indirect cost recovery and federal aid for scholarships are:
 - a. Expenditures
 - b. **Revenues**
 - c. Liabilities
 - d. All of the above

5. Decreasing expenses has a more predictable impact on financial health than increasing revenues.
 - a. **True**
 - b. False

6. Some numbers on the income statement and balance sheet are estimates. This approach to accounting is:
 - a. Cash
 - b. **Accrual**

7. Equity equals total assets minus total liabilities. An increase in accounts receivable:
 - a. Increases cash inflow
 - b. **Decreases liabilities**
 - c. Decreases cash inflow
 - d. Has no impact on cash flow

8. An increase in accounts receivable impacts the:
 - a. Income Statement
 - b. Balance Sheet
 - c. Cash Flow Statement
 - d. Cash Flow Statement and Balance Sheet
 - e. **All of the above**

9. Accounts Payable is an asset.
 - a. True
 - b. **False**

10. An increase in Accounts Payable:
 - a. Increases assets
 - b. **Decreases equity**

- c. Increases equity
 - d. None of the above
11. In accrual accounting, revenue is recorded when earned, and expenses recorded when paid.
- a. True
 - b. False**
12. When determining financial health using ratios, a consideration is that financial statements reflect the past, not the future
- a. True**
 - b. False
13. The Primary Reserve Ratio measures the liquidity of an institution.
- a. True**
 - b. False
14. The Primary Reserve Ratio can be improved by an increase in:
- a. Revenue**
 - b. Long-term Debt
 - c. Fundraising expense
 - d. Collateral
15. A Return on Net Assets Ratio can be impacted by results of fundraising.
- a. True**
 - b. False
16. Improvements year-to-year in the calculation of an institution's Net Income Ratio and/or Net Operating Revenues Ratio guarantees improved composite scores.
- a. True
 - b. False**
17. Endowment spending policies promise increased income for operations year over year.
- a. True
 - b. False**
18. Solicitation is most effectively conducted by professional fundraising staff.
- a. True
 - b. False**
19. A case statement should be interchangeable to increase efficiency of fundraising activities.
- a. True
 - b. False**
20. Funds accounting is essential for:
- a. Accurate reporting of restricted and unrestricted expenditures
 - b. Stewardship
 - c. Calculation of ratios
 - d. None of the above
 - e. All of the above**



Course Title: ELI: Module 7 – Resources/Financial Management

Course content feedback

1. Course content matched the session description.

Strongly Agree

Agree

Neutral

Disagree

Strongly Disagree

2. The learning outcomes were met.

Strongly Agree

Agree

Neutral

Disagree

Strongly Disagree

3. Current evidence was cited for specific content.

Strongly Agree

Agree

Neutral

Disagree

Strongly Disagree

4. Instructional activities added value to my learning experience.

- Strongly Agree
- Agree
- Neutral
- Disagree
- Strongly Disagree

5. Course content was effectively delivered.

- Strongly Agree
- Agree
- Neutral
- Disagree
- Strongly Disagree

6. Overall, the course was valuable.

- Strongly Agree
- Agree
- Neutral
- Disagree
- Strongly Disagree

7. Promotion of a product or service was NOT presented.

- Strongly Agree
- Agree
- Neutral
- Disagree
- Strongly Disagree

8. The Learning Center platform was supportive of my learning experience.

Strongly Agree

Agree

Neutral

Disagree

Strongly Disagree

9. The number of hours it took me to complete the course. Enter a number, only. If you have comments, enter them in the comment box, further below.

Comments

If you have any further suggestions or comments, please use the space below to tell us about them.



Submit

THE AMERICAN PHYSICAL THERAPY ASSOCIATION

*Presents this
Certificate of Completion*

To

[NAME]

For successful completion of the online course titled

ELI: MODULE 7 – RESOURCES/FINANCIAL MANAGEMENT

And hereby awards 3.1 Continuing Education Units (31 contact hours/CCUs)

*On
[date]*

Sharon L. Dunn

Sharon L. Dunn, PT, PhD, OCS
President



American Physical Therapy Association

1111 N. Fairfax Street • Alexandria, VA 22314



Approval Code: OHIO: California:

Pennsylvania State Board of Physical Therapy has recognized APTA as an approved provider of continuing education for this course.

PA evaluative procedures to treat a person without a referral:

The American Physical Therapy Association is recognized by the New York State Education Department's State Board for Physical Therapy as an approved provider of physical therapy and physical therapist assistant continuing education.

Participant License # _____

This course has been approved by the Nevada State Board of Physical Therapy Examiners for ___ units of continuing education.

This activity is provided by the Texas Board of Physical Therapy Examiners Accredited Provider # _____ and meets continuing competence requirements for physical therapist and physical therapist assistant licensure renewal in Texas.

The Ohio Physical Therapy Continuing Education Committee has approved this course for continuing education.

Course Title: ELI: Module 8 - Program Development and Assessment

Category: Online

CEUs: 3.3 CEUs/33 contact hours/CCUs (including posttest)

Level of Audience: Intermediate

Description:

Module 8 introduces important skills in designing and assessing programs that will facilitate student learning and its improvement within the context of institutional and program missions. This module focuses upon student learning and development and emphasizes the role of learning in determining program design and program efficacy. In that respect, the emphasis may differ somewhat from more traditional approaches to program design and evaluation, which tend to rely more heavily upon inferential indicators of quality.

Module 8 helps you look at your program in the context of the learning it intends to provide and the learning it actually produces. Thus it places fairly heavy emphasis on articulating that intended learning clearly and examining its achievement consistently.

Learning Objectives:

After completing this course you will be able to:

1. Evaluate different models of curriculum design in the context of institutional and programmatic missions and realities.
2. Use an outcomes-based approach to curriculum design and assessment.
3. Develop a comprehensive program evaluation plan, including benchmarks consistent with your program and institution vision and mission.
4. Design a comprehensive program evaluation process.
5. Evaluate the efficacy of your current program evaluation process.

Course Agenda:

Section	Minutes
Introduction and Overview	25
Section 1 – Outcome-based Thinking	75
Section 2 – Outcome-based Program Design	75
Section 3 – Outcome-based Assessment	70
Section 4 – Using Evidence From Outcome-based Assessment	70
Section 5 – Using Outcome-based Assessment in Program Evaluation	60
Summary and Closing	15
Discussion forum Postings & Virtual Office Hours	200
Journaling Assignments, Research Activities, Stop & Think	200
Required Readings	1100
Posttest	60
	Total Minutes = 1950
	Total Minutes/60 = 32.5
	Total CEUs = 33

Brief Speaker Bio:

Robert Mundhenk, PhD - Past President - Association for the Assessment of Learning in Higher Education

Robert Mundhenk, PhD, is the past president of the Association for the Assessment of Learning in Higher Education (AALHE), housed at the University of Kentucky. He is also senior scholar at the Higher Learning Commission of the North Central Association of Colleges and Schools; the largest regional accrediting agency in the country, where he has designed and run the commission's programming on the assessment of learning and has just developed an Academy on Student Persistence and Completion. He served as director of assessment for the American Association for Higher Education after teaching English at Fordham University and Northampton Community College for more than 30 years. At the latter institution, he also served as academic vice president for 12 years. In that role, he oversaw a number of health programs and was responsible for their reaccreditation. He received his PhD in English from the University of California at Los Angeles.

Outline:**Introduction and Overview**

- ✓ Reflection Activity: Outcome-based Approach (slide 11)
- ✓ Journaling Activity: Time to Explore Resources (slide 13)

Section 1 – Outcome-based Thinking

- ✓ Stop and Think: Assessing Your Program’s Learning Paradigm (slide 7)
- ✓ Journaling Activity: Is Your Program Learning Centered? (slide 11)
- ✓ Stop and Think: Applying Bloom’s Taxonomy (slide 18)
- ✓ Stop and Think: Analyzing Outcomes in Your Program (slide 30)
- ✓ **Discussion Forum:** Evaluating an Instructional Claim (slide 31)

Section 2 – Outcome-based Program Design

- ✓ Stop and Think: Reviewing Your Program Development Policies (slide 6)
- ✓ Journaling Activity: Topic- or Outcome-based? (slide 10)
- ✓ Activity: Reviewing a Curriculum Map (slide 18)
- ✓ **Discussion Forum:** Analyzing the Sample Curriculum Map (slide 25)
- ✓ Stop and Think: A Final Reflection (slide 29)

Section 3 – Outcome-based Assessment

- ✓ Journaling Activity: Using Student Performance Data (slide 7)
- ✓ Stop and Think: Using Rubrics (slide 11)
- ✓ Stop and Think: Using Descriptive Rubrics to Improve Student Performance (slide 18)
- ✓ Stop and Think: Using Rubrics in the Real World (slide 25)
- ✓ **Discussion Forum:** Engaging Faculty in the Assessment Process (slide 26)
- ✓ Stop and Think: Implementing an Outcomes Assessment Approach (slide 31)
- ✓ **Discussion Forum:** Develop a Rubric (slide 32)

Section 4 – Using Evidence From Outcome-based Assessment

- ✓ Stop and Think: Data Collection (slide 7)
- ✓ Journaling Activity: Are Your Data Useful? (slide 14)
- ✓ Stop and Think: Direct and Indirect Measures (slide 18)
- ✓ **Discussion Forum:** Direct and Indirect Measures (slide 27)

Section 5 – Using Outcome-based Assessment in Program Evaluation

- ✓ Stop and Think: Student Performance Data (slide 6)
- ✓ Stop and Think: Program Review Process (slide 15)
- ✓ Journaling Activity: Using Assessment Data (slide 19)
- ✓ **Discussion Forum:** Using Program Outcome Data for Program Evaluation and Review (slide 22)

References:

1. Maki P. *Assessing for Learning, 2nd Ed.* Sterling, VA: Stylus Publishing; 2010.
2. Stevens DD, Levi AJ. *Introduction to Rubrics.* Sterling, VA: Stylus Publishing; 2005.
3. NC State University. Internet Resources for Higher Education Outcomes Assessment. <http://www2.acs.ncsu.edu/UPA/archives/assmt/resource.htm>. Updated 4/1/2014. Accessed 4/10/2014.
4. UTAR. Revised Bloom’s Taxonomy. Universiti Tunku Abdul Rahman. http://www.utar.edu.my/fegt/file/Revised_Blooms_Info.pdf. Accessed 4/10/2014.
5. Oakleaf M, Belanger J, Graham C. Choosing and Using Assessment Management Systems: What Librarians Need to Know. *Proceedings of the ACRL 15th National Conference.* Indianapolis: Association of College and Research Libraries; 2013.

Justification of Calculated Hours

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Posttest questions are calculated as follows:

Fifteen questions are equal to thirty minutes of continuing education and twenty five questions are equal to sixty minutes of continuing education.

The total number of minutes for the educational content and the time allotted for posttests are calculated and divided by sixty. This total is then divided by ten to obtain the final amount of continuing education units.

Posttest:

1. Alignment of learning to institutional mission should occur at the program, course, and section levels. True 1.21
2. Analyzing and using data are essential parts of the assessment process. True 4.6
3. The best way to ensure a good assessment process is to use direct measures exclusively. False 4.21
4. Data from program review and evaluation should never be used in making budgeting requests. False 5.20
5. The data that institutions collect on their programs need to be relevant, meaningful, reasonable, and useful. True 4.8
6. Deciding on what data should be requested and how they should be reported should be conditioned, at least in part, by the degree to which staff can and will engage with it. True 4.12
7. Both descriptive and developmental rubrics have clear criteria and clearly described levels of achievement and so can indicate, at any point at which the rubric is used, the degree to which students are achieving the desired outcome. True 3.14 and 3.21
8. Developing a descriptive rubric can be a very useful device for helping faculty define and prioritize the core outcomes of their programs, as well as the means to assess them, even if they find the idea of structured feedback to students offensive. True 3.24
9. For part-time instructors and clinical supervisors, course materials based on descriptive rubrics can make clear what outcomes need to be developed and what criteria will be used to determine if they are. True 3.27
10. Formative assessments are interim assessments, designed to provide students and faculty meaningful information about student learning in order to improve it. True 4.11
11. Good outcome statements should be mission-driven, aligned at all levels, concrete, performance-based, integrative, and measurable. True 1.19
12. Grading and assessment are essentially the same thing. False 3.4
13. Graduation rates and student satisfaction surveys are indirect indicators of outcome achievement that do not necessarily tell us very much about what outcomes students have mastered. True 4.17 and 4.20
14. Information about student achievement is a much more direct indicator of a program's quality than reputational measures such as faculty degrees or publications, because it focuses the program's success in performance. True 5.17
15. A learner-centered model places increased emphasis on applying knowledge that students see as important and relevant to their career goals instead of what the faculty member sees as important. False 1.9
16. Multiple judges, when properly trained to assess actual student performance using agreed-upon criteria, display a high degree of interrater reliability. True 3.29
17. The number of outcomes in a program should be relatively low so that outcomes can be prioritized and integrated as fully as possible. True 1.26
18. An outcome is the intended result of a learning experience (course, program, clinical experience, internship, etc), articulated in terms of what a student can do with what he or she knows. True 1.14
19. The outcomes of courses and programs should reflect institutional mission and values. True 1.20

20. Outcome-based assessment is essentially a continuous improvement process. True 5.3
21. An outcome-based curriculum map incorporates intended levels of outcome development in its grid. True 2.15
22. Outcome-based data used in program evaluation or review delineate more clearly than any other “quality” indicators the degree to which a program has achieved its intended goals. True 5.15
23. Outcome-based thinking about curriculum and pedagogy emphasizes active learning that uses information. True 1.14
24. Required courses do not have to deal with all program outcomes, but they should all deal with at least 2 outcomes. False 2.26
25. A rubric explains to students the criteria against which their work will be judged. More important for our purposes, it makes public key criteria that students can use in developing, revising, and judging their own work. True 3.9
26. Rubrics are the only way of measuring student performance. False 1.27
27. “Students will understand basic elements of human anatomy” is a good program outcome. False 1.16
28. When a department chooses to use a developmental rubric to assess a core program’s outcomes, faculty teaching all sections of a course in which the rubric will be used must cover the same topics and use the same assignments to ensure that core outcomes are addressed and developed. False 3.23
29. Whenever students are exposed to or practice an outcome, their degree of achievement of that outcome should be measured, though not necessarily graded. True 2.30

Online Course Evaluation

**Title:** ELI: Module 8 - Program Development and Assessment

Directions: We value your feedback! Please complete this optional postcourse evaluation and click "submit" after the last question. After you submit the evaluation, please click the "Next" button in lower right-hand corner to reach the course completion page.

Overall Course & Content

Please note: Questions containing an asterisk "*" require a response in order to submit the survey.

***Content matched written description.**

Strongly Agree Strongly Disagree

***Current evidence was cited for specific content.**

Strongly Agree Strongly Disagree

***There was no promotion of a commercial product.**

Strongly Agree Strongly Disagree

***Authors clearly differentiated content based on personal experience, hypothesis, or research.**

Strongly Agree Strongly Disagree

***Course level was appropriate.**

Strongly Agree Strongly Disagree

***Course met my needs.**

Strongly Agree Strongly Disagree

***The overall quality of this course met my expectations.**

Strongly Agree Strongly Disagree

***I selected this course because of the**

content

course author

cost (economical)

other

If "other" selected above, please explain:

Demographic Information

*I am an APTA member:

Yes No

*I am a certified case manager:

Yes No

*I am a:

- PT
- PTA
- PT Student
- PTA Student
- Other

*Number of years in practice:

- 0
- 1-5
- 6-10
- 11-15
- 16-20
- 21-25
- Over 25

Learning Experience

*I enjoyed learning online.

Strongly Agree Strongly Disagree

*The presentation was easy to use/navigate.

Strongly Agree Strongly Disagree

*Content was organized appropriately.

Strongly Agree Strongly Disagree

*Text was easy to read.

Strongly Agree Strongly Disagree

***Images enhanced the learning experience.**

Strongly Agree Strongly Disagree

***I am likely to use the Learning Center to take courses in the future.**

Strongly Agree Strongly Disagree

***The course/presentation length was:**

Just right.

Too short.

Too long.

*** How long did it take you to complete this course?_____**

***Instructors provided feedback on my learning** **YES** **NO**

*** Objectives were reviewed**

Strongly Agree Strongly Disagree

*** Presenters identified potential conflicts of interest.**

Strongly Agree Strongly Disagree

*** Instructional methods were appropriate for content** (example: general lecture, question & answer, group discussion/activities, multimedia)

Strongly Agree Strongly Disagree

Here is an "open line" to APTA! Please let us know how we can improve our services:

THE AMERICAN PHYSICAL THERAPY ASSOCIATION

presents this

Certificate of Completion

to

[Name]

for successful completion of the Course entitled

ELI: MODULE 8 - PROGRAM DEVELOPMENT AND ASSESSMENT

And hereby awards 3.3 Continuing Education Units (33 contact hours/CCUs)

*On
[Date]*

Paul Rockar Jr.

Paul Rockar, Jr., PT, DPT, MS
President



Approval Codes: OHIO: California:

Pennsylvania State Board of Physical Therapy has recognized APTA as an approved provider of continuing education for this course.

PA evaluative procedures to treat a person without a referral:

The American Physical Therapy Association is recognized by the New York State Education Department's State Board for Physical Therapy as an approved provider of physical therapy and physical therapist assistant continuing education.

Participant License # _____



American Physical Therapy Association

1111 N Fairfax Street # Alexandria, VA 22314

This course has been approved by the Nevada State Board of Physical Therapy Examiners for ___ units of continuing education.

This activity is provided by the Texas Board of Physical Therapy Examiners Accredited Provider #1609016TX and meets continuing competence requirements for physical therapist and physical therapist assistant licensure renewal in Texas.

The Ohio Physical Therapy Continuing Education Committee has approved this course for continuing education.

Course Title: ELI: Module 9 – Relationships, Influence, and Partnerships

Category: Online

CEUs: 2.6 CEUs/26 contact hours/CCUs (including posttest)

Level of Audience: Intermediate

Description:

Welcome to our last module of the ELI on relationships, influence, and partnerships. This module is designed to provide you with strategies to leverage relationships and partnerships to establish a new program within an academic community. As you know, interpersonal relationships are the foundation upon which programs are built. While we will focus in general on some of the relational skills required to establish a new physical therapy school/program, we will examine specific tools for building healthy, authentic relationships and the proper way to use influence. We will examine potential risks and how to overcome them and will discuss communication from the perspective of listening and asking questions. We will examine criteria for selecting partners to establish a physical therapy school/program. And throughout we will provide you with opportunities to apply your learning to build a living document that will be your “Draft Strategic Plan.” Components of the plan will include a vision statement, networking strategy, technology approach, and contact list.

Learning Objectives:

After completing this course you will be able to:

1. Compare your leadership characteristics with the characteristics of a change agent, identify change agent characteristics that you possess, and determine practical ways to acquire those you do not possess.
2. Identify potential contacts to establish a new physical therapy school within a given academic environment and examine the risk factors associated with this endeavor.
3. Apply the principles for creating a positive public image for your physical therapy school/program by creating a shared vision, using emotional intelligence, and applying a situational leadership approach.
4. Recall the definition and methods for “leading from the middle” and identify practical strategies for applying the technique in your environment.
5. Assess available technologies to determine their appropriateness for your academic environment in the areas of communication and relationship building.

Course Agenda:

Topic	Minutes
Introduction and Overview	15
Section 1 – Being a Change Agent	45
Section 2 – Changing Risks to Opportunities (includes podcasts)	75
Section 3 – Enhancing Visibility (includes podcasts)	60
Section 4 – Leading From the Middle (includes podcasts)	60
Section 5 – Using Technology Effectively (includes podcasts)	60
Section 6 – Summary and Conclusion (includes podcasts)	20
Required Readings	800
Discussion Forum Posting & Virtual Office	150
Journaling Assignments, Take Action, Research Activity	240
Posttest	60
Total Minutes =	1585
Total Minutes/60 =	26.41667
Total CEUs =	2.6 CEUs

Brief Speaker Bio:**Deborah Waddill, EdD, MA-Educational Technology****President Restek Consulting**

Dr Deborah Waddill is President of Restek Consulting, a firm which provides consulting services on the strategic selection, design, and implementation of human and organizational learning services enabled by technology. It is this expertise that led her to serve on the Executive Board of a startup technology organization that uses video conferencing as a key component of its patented learning management system. Prior to founding her own consulting business, Waddill held a management position in a performance improvement technical training firm. Waddill is a published author on the topics of technology, leadership, and adult learning. In 2011, she co-authored a text entitled *The e-HR Advantage: The Complete Handbook for Technology-Enabled Human Resources* (Nicholas Brealey Publishing). Waddill is pleased to be an Adjunct Professor for The George Washington University's School of Medicine and Health Sciences and for GWU's Graduate School of Education and Human Development masters programs where she teaches online, blended and face-to-face courses for the Hampton Roads, Singapore, and Hong Kong campuses. In 2013, Waddill presented several times for the HR.com audience on topics dealing with leadership and technology. HR.com is the largest online community of HR professionals in the world boasting a membership of over 200,000. She also serves as a reviewer for the *Advances in Human Resource Development* and *Human Resource Development Review* journals. In 2012, Dr Waddill was inducted into the Alpha Eta Honor Society, which is committed to the promotion of scholarship, service and fellowship among health professionals and the recognition of leadership and high attainments in the health professions. Waddill earned her doctorate through the Executive Leadership Program at The George Washington University. Waddill earned her masters with highest honors in Educational Technology Leadership from The George Washington University. She received her B.A. in History/Secondary Education from Wheaton College.

Joseph Bocchino, EdD, MBA**Interim Senior Associate Dean for Health Sciences**

Joseph (Joe) Bocchino, EdD, MBA, has served as an executive within the pharmaceutical, health care, and hospitality industries and has held board positions within the private and public sectors. His corporate experiences have included hospital assignments; assignments in both the US domestic markets and global markets; responsibilities in pharmaceutical clinical research, manufacturing and marketing environments; medical device development and manufacturing; and oversight responsibilities for regulatory affairs and product registrations. He has extensive merger and acquisition experience in the evaluation and integration stages, focusing on the valuation and retention of human leadership capital during corporate transactions.

Bocchino teaches in the [School](#) of Medicine and Health Sciences and in the Graduate School of Education and Human Development. He continues to conduct research and to write, presenting his work in international academic forums. His expertise is extensive across the health services in the areas of clinical health sciences, clinical management and leadership, clinical research administration, clinical and translational research, emergency health services, health care quality, and regulatory affairs. He teaches in the Department of [Clinical Research and Leadership](#) at The George Washington University.

Bocchino earned his Bachelor of Science degree at Florida International University, MBA at Xavier University, and doctorate in [education](#) at The George Washington University.

Outline:**Introduction and Overview**

- ✓ *Pre-course Assignment: Find an Institution (slide 17)*

Section 1 – Being a Change Agent

- ✓ *Stop and Listen: An Interview With Joe Bocchino, EdD, MBA (slide 4)*
- ✓ *Journal Activity: Review Your Profile (slide 8)*
- ✓ *Discussion Forum Activity: Share Your Questions and Insights (slide 12)*
- ✓ *Activity: Assessing The George Washington University Vision Statement (slide 15)*
- ✓ *Take Action: Start Your Strategic Plan (slide 16)*

Section 2 – Changing Risks to Opportunities

- ✓ *Stop and Listen: An Interview With Joe Bocchino, EdD, MBA (slide 4)*
- ✓ *Stop and Think: Approaches to Risk (slide 8)*

- ✓ *Discussion Forum Activity: Dealing with Risk (slide 15)*
- ✓ *Take Action: Record Contacts & Research and Develop External Contacts (slides 27-28)*

Section 3 – Enhancing Visibility

- ✓ *Stop and Listen: Multiple Interviews (slide 4)*
- ✓ *Stop and Think: Applying the Readings and Interviews (slide 5)*
- ✓ *Stop, Think, and Journal: Trends Revisited (slides 18-19)*
- ✓ *Journaling Activity: Creating a Public Image (slide 21)*

Section 4 – Leading From the Middle

- ✓ *Stop and Listen: An Interview With Joe Bocchino, EdD, MBA (slide 4)*
- ✓ *Stop and Think: Leading From the Middle (slide 5)*
- ✓ *Research Activity: Constructing and Employing Interview Questions (slide 19)*
- ✓ *Discussion Forum Activity: Interview Debriefs (slide 20)*

Section 5 – Using Technology Effectively

- ✓ *Stop and Listen: An Interview With Joe Bocchino, EdD, MBA (slide 4)*
- ✓ *Discussion Forum Activity: Experience and Observation of Technology Uses (slide 11)*
- ✓ *Stop and Think: Applying Technology (slide 22)*
- ✓ *Take Action: Technology and Your Strategic Plan (slide 23)*

Section 6 – Summary and Conclusion

- ✓ *Stop and Listen: Joe Bocchino’s Closing Comments (slide 2)*

References:

1. Porter-O’Grady T, Malloch K. *Quantum Leadership: Advancing Innovation, Transforming Health Care*, Third Edition. Sudbury, MA: Jones and Bartlett Learning, LLC; 2011.
2. Waddill D, Marquardt M. *The e-HR Advantage: The Complete Handbook for Technology-enabled Human Resources*, Boston, MA: Nicholas Brealey Publishing; 2011.
3. Rooke D, Torbert WR. Transformation of leadership. *Harvard Business Review*. April 2005:67-76.
4. Bolman L, Deal T. *Reframing Organizations: Artistry, Choice and Leadership*. San Francisco, CA: Jossey-Bass; 2008.
5. Kouzes JM, Posner BZ. *The Leadership Challenge*. 4th ed. San Francisco, CA: Jossey-Bass; 2007.
6. RoAne S. *How to Work a Room*. Rev ed. Harper Collins Publisher; 2007.

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Posttest:

1. The characteristics of a “change agent” are:
 - a. Tuning in to the environment.
 - b. Challenging the status quo.
 - c. Communicating a compelling vision.
 - d. **All of the above.***

2. The characteristics of a complex system include:
 - a. Being composed of many parts.
 - b. **Exhibiting one or more properties as a whole not obvious from the properties of the individual parts.***
 - c. Having the characteristics of chaos.
 - d. Having complexities beyond normal understanding.

3. Diversity is essential to change because it:
 - a. **Creates the variety required by change.***
 - b. Accentuates the similarities that exist through change.
 - c. Makes chaos visible and underscores the need for adaptation.
 - d. Highlights the difficulty of reconciling differences.

4. Systems thinking requires a leader to be inclusive, positive, forward looking, collaborative, and alert.
 - a. **True***
 - b. False

5. Complex systems relate to leadership in the following way:
 - a. They live in the actual.
 - b. They look at the part instead of the whole.
 - c. They strive for “zero” errors.
 - d. **They accept diversity as essential.***

6. The following components are part of a standard vision statement:
 - a. The organization’s hopes and dreams for the future.
 - b. **Values, philosophies, aims, and objectives.***
 - c. Timelines for implementation of all planned actions.
 - d. Financial goals for the organization.

7. Bolman and Deal emphasize which frame as most relevant to dealing with leadership in an academic community?
 - a. Human resources.
 - b. Structural.
 - c. **Political.***
 - d. Symbolic.

8. Vulnerability is an essential leadership trait for the authentic leader. Its major effect is to:
 - a. Expose the leader’s weaknesses to others in the organization.
 - b. Improve the leader’s ability to manage information.
 - c. Reduce the leader’s authority and control.
 - d. **Improve the leader’s ability to uncover multiple perspectives on an issue.***

9. A leader’s relationships or social connections have increased in importance as a means to:
 - a. **Facilitate the work of the organization.***
 - b. Increase the leader’s visibility.
 - c. Interpret information.
 - d. Manage conflict.

10. The purpose of a SWOT analysis is to:
- Assess internal and external conditions for marketing purposes.
 - Analyze and mitigate risk for strategic planning.***
 - Identify and target individuals and organizations for marketing purposes.
 - Identify internal and external threats for financial planning.
11. Situational leadership is appropriate for creating a shared vision within a diverse group because of the following:
- The follower adjusts to the style of the leader.
 - The leader adjusts to the development levels of the follower.***
 - The leader shares the same values as the follower.
 - The follower must raise his or her competency level before collaborating with the leader.
12. According to Peter Senge, a “shared vision” depends upon intrinsic motivators that uplift individual aspirations and create the spark that lifts organizations out of the ordinary drab existence.
- True***
 - False
13. According to Porter-O’Grady and Malloch, emotional intelligence includes all of the following except:
- The ability to control and suppress emotions.***
 - Social skills.
 - The ability to regulate self.
 - Self-awareness.
14. The starting point for an emotionally competent leader is:
- Good connections and relationships with superiors.
 - The ability to negotiate a beneficial contract.
 - Power to mitigate employee dissatisfaction.
 - Having a healthy view of self.***
15. Dr. Joe Bocchino applies the situational leadership approach when working with faculty by using both of the following:
- Coaching and directing
 - Directing and supporting
 - Supporting and coaching
 - Delegating and supporting***
16. Leading from the middle includes:
- Not seeking the limelight.
 - Being true to self.
 - Having a vision for where the organization should go.
 - All of the above.***
17. Open-ended questions begin with phrases such as:
- Did you ...?
 - Are you going to...?
 - Will you have...?
 - Have you been...?
 - True
 - False***
18. Active listening is a leadership skill that can be defined as:
- Listening with a purpose.

- b. Excluding noise and listening for key words.
 - c. Listening using your mental models.
 - d. Listening for context and content.***
19. The theory of leadership most aligned with leading from the middle is:
- a. Transactional leadership.
 - b. Servant leadership.
 - c. Situational leadership.
 - d. Authentic leadership.***
20. Bloom's taxonomy provides a way to construct thought-provoking questions through the use of words that generate higher-level thinking. The highest level of critical thinking in Bloom's taxonomy is:
- a. Synthesis
 - b. Analysis
 - c. Application
 - d. Evaluation***
21. As Bocchino stated in his podcast, technology can have unexpected outcomes that prod us in new directions, so we should:
- a. Be cautious in the use of a variety of new technologies.
 - b. Avoid being an early adopter of new technologies.
 - c. Tinker with technologies and encourage staff to do the same.***
 - d. All of the above.
22. A listserv is an electronic mailing list that allows a sender to send a single e-mail to everyone in a group, and then concurrently distribute it to all of the addresses of the subscribers; a disadvantage of this technology is:
- a. Wide distribution
 - b. Cost effective
 - c. Easily misused***
 - d. Complexity
23. Generational differences should be taken into account when designing a technology approach, so consider the fact that the generation that is least attracted to technology is:
- a. The Millennials.
 - b. Generation Y.
 - c. Generation X.
 - d. The Baby Boomers***
24. Network etiquette or "netiquette" as a communication approach includes:
- a. Use of abbreviations to shorten messages.
 - b. Forwarding information provided by experts.
 - c. Using your name in the signature line.***
 - d. All of the above.
25. Methods to evaluate the effectiveness and impact of a new technology include:
- a. Calculating Return on Investment.
 - b. Measuring performance outcomes.
 - c. Gathering and evaluating user feedback.
 - d. All of the above.***

Online Course Evaluation

**Title:** ELI: Module 9-Relationships, Influence, and Partnerships

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Overall Course & Content

Please note: Questions containing an asterisk "*" require a response in order to submit the survey.

***Content matched written description.**

Strongly Agree Strongly Disagree

***Current evidence was cited for specific content.**

Strongly Agree Strongly Disagree

***There was no promotion of a commercial product.**

Strongly Agree Strongly Disagree

***Authors clearly differentiated content based on personal experience, hypothesis, or research.**

Strongly Agree Strongly Disagree

***Course level was appropriate.**

Strongly Agree Strongly Disagree

***Course met my needs.**

Strongly Agree Strongly Disagree

***The overall quality of this course met my expectations.**

Strongly Agree Strongly Disagree

***I selected this course because of the**

- content
- course author
- cost (economical)
- other

If "other" selected above, please explain:

Demographic Information

***I am an APTA member:**

Yes No

***I am a certified case manager:**

Yes No

***I am a:**

PT
 PTA
 PT Student
 PTA Student
 Other

***Number of years in practice:**

0
 1-5
 6-10
 11-15
 16-20
 21-25
 Over 25

Learning Experience

***I enjoyed learning online.**

Strongly Agree Strongly Disagree

***The presentation was easy to use/navigate.**

Strongly Agree Strongly Disagree

***Content was organized appropriately.**

Strongly Agree Strongly Disagree

***Text was easy to read.**

Strongly Agree Strongly Disagree

***Images enhanced the learning experience.**

Strongly Agree Strongly Disagree

***I am likely to use the Learning Center to take courses in the future.**

Strongly Agree Strongly Disagree

***The course/presentation length was:**

- Just right.
- Too short.
- Too long.

*** How long did it take you to complete this course? _____**

***Instructors provided feedback on my learning YES NO**

*** Objectives were reviewed**

Strongly Agree Strongly Disagree

*** Presenters identified potential conflicts of interest.**

Strongly Agree Strongly Disagree

*** Instructional methods were appropriate for content** (example: general lecture, question & answer, group discussion/activities, multimedia)

Strongly Agree Strongly Disagree

Here is an "open line" to APTA! Please let us know how we can improve our services:

THE AMERICAN PHYSICAL THERAPY ASSOCIATION

presents this

Certificate of Completion

to

[Name]

for successful completion of the Course entitled

ELI: MODULE 9 - RELATIONSHIPS, INFLUENCE, AND PARTNERSHIPS

And hereby awards 2.6 Continuing Education Units (26 contact hours/CCUs)

*On
[Date]*



Paul Rockar, Jr., PT, DPT, MS
President



Approval Codes: OHIO: California:

Pennsylvania State Board of Physical Therapy has recognized APTA as an approved provider of continuing education for this course.

PA evaluative procedures to treat a person without a referral:

The American Physical Therapy Association is recognized by the New York State Education Department's State Board for Physical Therapy as an approved provider of physical therapy and physical therapist assistant continuing education.

Participant License # _____



American Physical Therapy Association

1111 N Fairfax Street # Alexandria, VA 22314

This course has been approved by the Nevada State Board of Physical Therapy Examiners for ___ units of continuing education.

This activity is provided by the Texas Board of Physical Therapy Examiners Accredited Provider #1609016TX and meets continuing competence requirements for physical therapist and physical therapist assistant licensure renewal in Texas.

The Ohio Physical Therapy Continuing Education Committee has approved this course for continuing education.

Education Leadership Institute

Bolman and Deal's Framing Self-Rating Scale

APPENDIX M



This questionnaire asks you to describe yourself as a manager and leader. For each item, give the number "4" to the phrase that *best* describes you, "3" to the item that is next best, and on down to "1" for the item that is *least* like you.

1. My strongest skills are:

- _____ a. Analytical skills
- _____ b. Interpersonal skills
- _____ c. Political skills
- _____ d. Flair for drama

2. The best way to describe me is:

- _____ a. Technical expert
- _____ b. Good listener
- _____ c. Skilled negotiator
- _____ d. Inspirational leader

3. What has helped me the most to be successful is my ability to:

- _____ a. Make good decisions
- _____ b. Coach and develop people
- _____ c. Build strong alliances and a power base
- _____ d. Inspire and excite others

4. What people are most likely to notice about me is my:

- _____ a. Attention to detail
- _____ b. Concern for people
- _____ c. Ability to succeed in the face of conflict and opposition
- _____ d. Charisma

5. My most important leadership trait is:

- _____ a. Clear, logical thinking
- _____ b. Caring and support for others
- _____ c. Toughness and aggressiveness
- _____ d. Imagination and creativity

6. I am best described as:

- _____ a. An analyst
- _____ b. A humanist
- _____ c. A politician
- _____ d. A visionary

© 1988, Lee G. Bolman and Terrence E. Deal. All rights reserved. This survey is based on ideas in Bolman and Deal's *Reframing Organizations: Artistry, Choice and Leadership* (San Francisco: Jossey-Bass, 1991, 1997, 2003). Found at: http://www.leebolman.com/frames_selfrating_scale.htm

Education Leadership Institute

Bolman and Deal's Framing Self-Rating Scale



SCORE	
	Structural (sum of a's)
	Human Resource (sum of b's)
	Political (sum of c's)
	Symbolic (sum of d's)
0	TOTAL (should equal 60)

INTERPRETATION				
Percentile	Structural	HR	Political	Symbolic
90th %	23	24	17	21
75th %	19	22	13	17
50th%	16	19	11	14
25th%	12	16	9	11

The table shows percentiles for each frame, based on a sample of more than 700 managers from business, education and government. For the structural frame, for example, 25% of managers rate themselves 12 or below, 50% rate themselves 16 or below, 25% rate themselves 19 or above, and only 10% rate themselves 23 or above.

Discussing the results: After individuals have completed and scored the form, we often collect high scores and low scores for each frame, and display them on a blackboard or flipchart. This gives a rough indication of the distribution of frame orientations in a group. An effective discussion activity once people have computed their scores is to ask them to meet in small groups (typically, 2-4 people) and discuss two questions: (1) Do the results seem right? (That is, do individuals feel that their scores make sense? If not, what's wrong, or what's missing?) and (2) Are the results what they want? (That is, given their sense of the kind of leader they want or need to be, how well do these results fit?)

Strategic Planning Case Vignette

You are a chair of a department of physical therapy within a College of Health Professions. Your academic institution is research intensive and recently completed a strategic planning process. The major foci of the institution strategic plan are to:

1. develop better connections with the community,
2. increase the research enterprise,
3. develop a more diverse faculty and students, and
4. seek to globalize the students' experience.

The dean of the college has now organized a strategic planning steering committee to begin this plan for your college. The college has 8 departments representing multiple health professions, and physical therapy is the only doctoring professional program. The other departments include both baccalaureate and masters programs. Physical therapy comprises approximately half of the college student body in terms of FTE.

You have been appointed by the dean as a member of the college strategic planning steering committee, which includes chairs, staff, students, and faculty. One of the committee members' charges is to discuss with their respective departments the vision of the department and what is needed to realize that vision. After two departmental meetings devoted to this topic, the staff and faculty identified 4 strategic priorities:

1. Advance the research culture through the development and implementation of a PhD program in rehabilitation science,
2. Increase ethnic/racial and socioeconomic diversity of students and faculty in the department,
3. Establish an interprofessional pro bono clinic in the surrounding community, and
4. Form stronger alliances with clinical partners in the community for clinical education.

In the follow-up meeting of the college steering committee, each chair presented their departmental vision and strategic priorities to the group. This was followed with a general discussion of strategic priorities including similarities and differences. Eight sheets of newsprint were placed around the room identifying the priorities of each department and each committee member was given 4 red dots to select their preferred priorities. Both the rehabilitation science PhD priority and the pro bono clinic priority were among the 5 top priorities. Following this exercise, the dean announced that she would take the committee's work under advisement, and would complete the college strategic plan proposal.

When the final draft of the plan was presented to the chairs, the only physical therapy department priority that was represented was the strategic goal to increase diversity of the college. Other priorities in the dean's draft strategic plan included increased enrollment, increased scholarly productivity, and development of international clinical experiences.

Questions:

1. What thoughts do you have about the college strategic planning process?
 - a. If you were in the role of the dean, would you have done this differently?
2. As the chair of the PT department, how do you communicate with your faculty about the final college strategic plan draft?
3. How do you balance your advocacy for your department with your responsibility to work effectively within the college environment? What action would you take as an advocate?
4. As you form your departmental strategic plan,
 - a. Do you abandon your departmental priorities and focus on the college strategic plan?
 - b. Should there be complete nesting of strategic planning – department within college, college within academic institution?
5. Assuming the dean's decision is not well received by the PT department faculty, how do you, as the department leader, create a positive atmosphere so that an undercurrent of negativity and frustration doesn't alienate your department?
6. What leadership frames may come into play as you advocate for your department with the dean and the other department chairs, and also try align your faculty with administrative goals?

ELI FELLOWSHIP PROGRAM STUDENT DISMISSAL CASE SCENARIO

You are the program director of a newly developed PTA program and your faculty is inexperienced, particularly your director of clinical education (DCE) who only has one year of experience. You accepted your first class of students almost two years ago and they are getting ready for their final full-time clinical experience. Your faculty is very committed to helping students be successful and are very proud of their retention rate. The group values and is committed to a 100% retention rate.

You are preparing for this week's faculty meeting and send an email to all faculty members to see if they had any items for the agenda. Given the DCE/ACCE is preparing to place the students in clinic, one of the items for discussion is the students' readiness for clinical placement. You ask the faculty to forward names of anyone they believe needs to be discussed. Two of your newest faculty members indicate that they do not believe John should go to clinic and would like to discuss this at the meeting. You have had some unusual encounters with John such as making odd faces during some of your lectures, making a somewhat off colored joke with his peers, and coming late to class on occasion. But these behaviors were not consistent and there was nothing that rose to the level of significant concern as addressed by handbook policy that would require you to call him into your office for further discussion.

When his name is brought up at faculty meeting, every faculty member said the same thing. He has been late and unprepared for lab, he was seen flirting with one of the clients during a local health fair that the program sponsors, his classmates complained on more than one occasion that he was not very engaged in a number of group projects, he ultimately participated, but was late with everything. The list continues. The DCE/ACCE also noted that during his last part-time integrated clinical experience his clinical instructor (CI) also gave him low marks on professionalism and informally commented to the DCE/ACCE that he showed similar behaviors in the clinic and she would have failed him if she could. However, when the DCE looked at the clinical performance instrument (CPI), she did not feel that this behavior rose to the level of a failure. She thought maybe the CI was just being harsh, and besides, John had good grades and was now ending his 4th semester in the program.

When asked, every faculty member indicated they had observed similar behaviors but did not see it as a big problem. No one documented his behaviors or their discussions with him because they just thought he was just being immature and needed a little more time to mature. After a long discussion, they felt that although they were concerned about him being in the clinic, they had no documentation to really hold him back.

John went to clinic and on day 5 the CI and CCCE together called the DCE/ACCE and asked that he be removed from clinic. The CI complained that he had not only flirted with her but with one of her patients, he was late to clinic 3 of 5 days, and had difficulty completing his documentation on time. The DCE/ACCE immediately called the student and told him not to return to clinic and that she would be in touch about next steps.

Based on this incident, and the previous conversation in faculty meeting, the DCE is advocating that John be dismissed from the program. She does not want to send him out to clinic again because she is afraid he will give the program a bad reputation. The faculty is apprised of this situation.

**ELI FELLOWSHIP PROGRAM
STUDENT DISMISSAL CASE SCENARIO**

Questions to consider:

1. Discuss the legal and ethical aspects of this case.
2. As the Program Director, how would you resolve this issue?
3. What training and resources would you provide for your faculty in their role as educators?
4. What training would you provide for your students to develop their professional identity as a physical therapist/physical therapist assistant prior to beginning clinical coursework?
5. What concerns do you have in bringing this case to the upper administration?
6. Are there others who should be involved in this situation?
7. What policies would help to resolve this situation in the future?



EDUCATION LEADERSHIP INSTITUTE
3RD ONSITE SESSION
Module 7: Resources/Financial Management

Case Vignette

At a recent meeting of program directors, the Dean announced that the institution will be implementing a zero-based budgeting process for the coming academic year. As a starting place for this new budget process, each department/unit will be required to justify its proposed expenses and income. Previous income and expense targets will not determine the future budget. The Vice President of Finance has indicated that all departments/programs/schools/units are expected to operate with a minimum of 30% net revenue beyond expenses (Direct Margin).

The Dean has suggested that each department/program/school/unit begin with a review of essential expenses (salary, fringe, and operating) and then determine the necessary revenue to address these expenses while maintaining the minimum required net revenue (Direct Margin). The Dean has also indicated that a department/unit that can exceed the minimum required direct margin of 30% will be rewarded by splitting (Dean = 60%, Department = 40%) that direct margin with the Dean. The Dean has provided you with a template to work from, that accounts for all of the hidden expenses as well as income generated from tuition and other sources.

The program director, new to her role in the past two years, has already heard from faculty about the inadequacy of *monies* to address capital equipment needs of the program, including faculty research equipment, new instructional lab equipment, and professional development support for faculty.

The new zero-based budget proposal for each program in the institution is due to the Dean in 4 weeks.

Questions for consideration:

1. How can the program director make the budget process both transparent and participatory while at the same time meeting the Dean's expectations and timeline?
2. How will you obtain input on the budget and the budget process?
3. What resources might the program director use to assist with this budget process?
4. What are the negotiable and non-negotiable aspects of the budget and why?
5. How will the department's vision, goals, and objectives frame the budget negotiation?
6. How will budget priorities be determined and implemented in the budget process?
7. How might the program director use this opportunity to identify and advance new initiatives of the department or examine how funds can be most effectively used?
8. What aspects of the process are important to communicate, to whom, and how?



EDUCATION LEADERSHIP INSTITUTE
3RD ONSITE SESSION
Module 8: Program Development and Assessment

Case Vignette

A CAPTE accredited physical therapy education program (PT or PTA) situated in a large public institution of higher education has recently completed its CAPTE continuing accreditation process, including the self-study and onsite visit. CAPTE has completed the review of these materials and granted accreditation with a compliance report including the criterion on Program Assessment and Planning. The Commission citation reads as follows:

“Through review of the self-study materials and as indicated by the report of the on-site visit team, it appears that the program has assessment *processes* in place for all the required aspects of program assessment except for “consistent assessment of expected student outcomes.” Specifically, data available onsite indicated that the assessment process in these other aspects of program assessment have only occurred in the past year. Provide evidence that expected student outcomes are being assessed and addressed regularly, and that an ongoing process of assessment has been *implemented* for each of the other assessment areas.”

After review of the CAPTE Summary of Action, the Dean of the College expresses concern that several health professions programs within the institution have been cited on the need for more consistent and ongoing student outcomes assessment. This is further underscored by the fact that the institution will be initiating its Middle States Commission on Higher Education institutional accreditation process including self-study in the coming year. The Dean has asked program directors within the institution to develop an institution-wide strategy for student outcomes assessment that also includes those student outcomes that relate to the achievement of the university’s mission. The Dean has offered to provide financial resources and staff support for this new initiative to assist each program in meeting this accreditation requirement at program/unit and institutional levels.

As an initial step in this college-wide process, the Dean has asked each program to form a faculty task force to identify the outcomes to be assessed, the data needed to support these outcomes, the mechanisms for collection of these data, including the frequency of data collection, and an ongoing process of data analysis and ongoing quality improvement.

Questions for consideration:

1. What process might the program director use to analyze and address the CAPTE citation while simultaneously addressing the request of the Dean?
2. What must be taken into consideration when developing program specific student outcomes within the mechanism of a college-wide outcome assessment initiative?
3. What additional resources might be needed to develop and implement these outcome assessment activities?
4. What other resources are available within the institution?
5. What role does physical therapy play in this process with others within the institution?



EDUCATION LEADERSHIP INSTITUTE
3RD ONSITE SESSION
Module 8: Program Development and Assessment

6. With respect to student outcomes, what strategies would the program director use to ensure that student outcomes are linked to the institution's vision and mission statements?
7. With respect to student outcomes, what strategies would the program director use to ensure that institutionally defined student outcomes are assessed?
8. Who among the program faculty and staff should participate in crafting the response to this citation?



EDUCATION LEADERSHIP INSTITUTE
3RD ONSITE SESSION
Module 9: Relationships, Influence, and Partnerships

Case Vignette

You are the program director of a physical therapy education program (PT or PTA) in an urban area. You serve on the Board of your city's Chamber of Commerce Homeless Task Force. The Board President presents the latest data on the increasing rate of obesity and diabetes in the homeless population and seeks suggestions for addressing this critical city problem by the Task Force. The Board President recommended you as the chair for this Exploratory Committee to identify the main causative factors and to recommend resources, including technologies, and strategies to address this problem. You are considering accepting this role as it is consistent with your institution's mission and plan for increasing its visibility in the community. Volunteers to serve with you are from the City Hospital Association, the city's School Board, a board member of the city Interfaith Coalition, and the CFO of the largest bank in the city. The 5 members of this Task Force are scheduled to meet in two weeks.

Questions for Consideration:

1. What are the benefits to your program and faculty for you becoming involved in such an innovative initiative?
 - a. What are the risks?
 - b. What parameters would you place on your participation?
2. How would you envision your role as a change agent in addressing this problem?
3. Do you have the capacity to lead this initiative?
 - a. If yes, what skills/resources/insights do you bring to this initiative?
 - b. If not, why not?
 - c. What strategies would you use to develop the capacity to lead this initiative?
 - d. How will you make the decision if you can assume this responsibility in addition to your program director responsibilities?
4. How do you go about establishing realistic goals and a unified vision for this task force?
5. Assume you are the permanent chair of this Exploratory Committee, what are your roles and responsibilities as the leader? What is your responsibility to your institution?
6. As the chair of the Exploratory Committee, what strategies and possible steps do you recommend to begin this project?
7. Who would you need as additional critical partners for this project?
8. What possible outcomes could you measure to determine success for this project?

**ELI FELLOWSHIP PROGRAM
ETHICAL DILEMMA CASE SCENARIO**

You are the director of the Department of Physical Therapy. Midway through the fall semester, a faculty member alerts you to a situation. Two final year students went to the faculty member in distress, reporting that they were recipients of a forwarded email that contained documents of memorized test questions/answers from year 1 and year 2 tests. The two students showed the email to the faculty member, who then forwarded the email to you. After reviewing the email history, you deduce that the documents originated from a recent graduate of the program (Jack) who then emailed the documents to a final year student (Bob). Bob forwarded the email to 6 classmates. One of the recipients, Jim, further forwarded one additional time to another 5 students. Bob originally received the email from Jack when he requested “advice” on how to study for the upcoming comprehensive written and laboratory exams (he did not request actual test documents). All 11 students noted on the email were excellent students in the final year class and had no history of academic, clinical, or professional behavior issues.

The program has an academic integrity policy in the student handbook based on an institution academic honor code. Students were well-informed about definitions of cheating, including discussions about cheating on the National Physical Therapy Examination (NPTE) and subsequent ramifications when students have cheated on the NPTE in the past. Additionally, classroom discussions had included both discussion and case application for ethical problem solving.

In seeking additional information, you speak to the class about the situation. Privately, all students involved come forth and report that while they had received the email, they had not opened it, and did not know what it contained. Bob tearfully accepts full responsibility for forwarding the email; however, denies that he knew what it contained before forwarding. He requests that no other student be punished. He shows you the email he sent to his peers immediately after opening the documents when he recognized what they contained. The email warns his peers about what the documents contain and tells them, “...I am deleting the documents but you can do with them what you please – they might be helpful.”

Questions to consider:

1. What additional information would the director need?
2. Where would this information/data need to be obtained?
3. What should the program director’s next steps be in addressing this concern?
4. What steps, if any, should the director take with regard to the graduate?
5. Who should be involved at this time? What documentation should be produced?
6. How might the director use this situation to prevent future problems?
7. How will your actions inform the future reputation of this program?

**ELI FELLOWSHIP PROGRAM
PROMOTION AND TENURE CASE SCENARIO**

You are a chair of a Physical Therapy Department and have a role in making a recommendation regarding promotion and tenure as part of your responsibilities. An assistant professor in your department is going up for promotion and tenure. Her annual performance evaluations for the past five years show a borderline performance of barely meeting the minimum expectations for 3 consecutive years but in the past 2 years, her evaluations have been slightly stronger, especially in the area of service. Although her 5 year annual performance record shows satisfactory performance overall and her service is exceptional, her faculty dossier is not strong (eg, publication totals below expectations, teaching scores from students and faculty colleagues in the lower range). Her service involvement at the university and state levels is exceptional and well documented but you fear that will not be sufficient to result in a successful review. You suspect that her promotion and tenure application may receive a satisfactory review from the physical therapy department promotion and tenure committee because faculty generally like her and view her as a hard worker. Yet, you believe it will be a challenge for her to satisfactorily navigate through the school and faculty senate promotion and tenure committees without strong support from you as the department chair.

In considering the academic institution's enhanced valuing of scholarship initiatives, you are concerned about her ability to be successful as a researcher now and in the future. Based on her track record, you are not confident that she will function at a scholarship level consistent with the new academic institution expectations for scholarship. However, you are conflicted because neither the 5 yearly annual performance evaluations (4 submitted from the previous chair and one submitted from you last year in your first year as department chair) nor the mid-tenure review documented that she was not making good progress toward tenure. In retrospect, your annual performance evaluation of her last year was too soft and naïve mostly because you were tentative in your new role as department chair and were trying to be supportive and nice.

Questions to consider:

1. You regret not writing a more objective performance evaluation last year but are trying to write a recommendation that is fair for the department, college, university, and individual. What recommendation do you make to the tenure committee? Why?
2. What are the implications of the annual performance evaluations in the promotion and tenure process?
3. What is the role of the program chair in facilitating faculty's successful progress toward tenure?
4. You fear that a negative report from you may be interpreted as unfair in light of the previous annual performance evaluations but a positive report may set a precedent of departmental recommendation for tenure despite underperformance that could influence other tenure track faculty. What leadership frames would you consider in your role?
5. Analyze the situation from all four leadership frames and the implications of each frame.

EDUCATION LEADERSHIP INSTITUTE
First On-Site Session
September 30 – October 1, 2015



Case Vignette – Part I

You are a new PT program director just hired from outside the institution for a 3-year DPT program in a private university, situated in the College of Health Sciences, which consists of 6 accredited health professions programs. The institution is classified by the Carnegie Foundation in the “Master’s Colleges & Universities” category. Your predecessor who just retired is no longer on faculty, and 50% of the faculty members in the physical therapist program are older than you. You were previously a faculty member at another institution with 15 years of experience as a physical therapist, including the past 7 years as a Clinical Assistant Professor. You recently completed a PhD degree and have a limited number of peer-reviewed publications. In your prior role as a faculty member you contributed to teaching, research, and service in a Doctorate Granting University (“Research 1”) in an Academic Health Center. You are entering the Program Director position on a tenure track and negotiated the rank of Associate Professor without tenure.

The physical therapist program will be reviewed for reaccreditation in 2 years. The faculty is comprised of 10 FTEs; 5 men, 3 women, and two new faculty vacancies, with no significant faculty turnover in 8 years. The program consists of a total of 110 current students in three classes with 40 students in the incoming class. The attrition rate for students per class for the past 3 years has been 2 students annually. The 3 year ultimate pass rate on the licensure examination was 83%.

The Dean of the College, to whom the Program Director reports, has been in his position for 4 years and recently shared with you that faculty members are anxious about having a new program director with an unknown leadership style after 20 years with their previous established director. The Dean has indicated that there will be some institutional changes in the near future with respect to creating a more active and cohesive Council of Program Directors designed to advance initiatives within the college, relationships with the health care community given an underserved population, and exploration of interprofessional education within the academic institution.

-
- 1. Analyze the *context* in which this vignette occurs and possible implications.**
 - 2. What do you perceive as the issues for the new program director?**
 - 3. As a new academic leader, what are your top 3 priorities? Why?**
 - 4. What are the goals that you would like to achieve related to these priorities?**

EDUCATION LEADERSHIP INSTITUTE
First On-Site Session
September 30 – October 1, 2015



Case Vignette – Part II

Several faculty members have approached you individually to change their teaching assignments, course schedules, and committee assignments. One faculty member just received a Health Resources and Services Administration (HRSA) grant, which includes release time for someone to assume part of his workload while he dedicates his time to his newly funded research. Meanwhile, the Dean has asked you to justify one of the current new faculty vacancies, which without substantial rationale is at risk for elimination. In addition, the Dean has asked you and the PT Program faculty to be involved in the development and implementation of an interprofessional and college-wide community health care education program for an underserved population with diabetes and obesity. This will address a strategic initiative of the institution to build good will and focus on the priority needs of the community.

- 1. Given the additional information, have your priorities changed? If so, how and why?**

- 2. What strategies will you use to approach your priorities at the personal, individual and collective faculty, department, college, and institutional levels?**

- 3. What specific goals/outcomes do you hope to achieve and within what time frame?**

- 4. How will you know if your strategies were successful?**



Education Leadership Institute
Scripted Scenarios (Based on Modules 4, 5, and 6)
2nd ELI Onsite Session

Goal of Scenario Role Play: The purposes of this scenario role play are for participants to:

- Apply concepts learned from ELI Modules 4, 5, and 6 through an applied case scenario;
- Assess the facts of the case based on the information provided from the perspective of the role of the person assigned in the scenario;
- Engage in “on-the-fly” dynamic interactions with the stakeholders involved in the case situation as it unfolds with appropriate dialogue given the situation; and
- Determine the appropriate process steps to address this case leading to an outcome and resolution of this situation.

Scenario:

The student received a failing grade in a skills-based course. She was informed by her Faculty Advisor, that this failure may result in a recommendation of suspension. During this conversation, the student accused the faculty member of prejudice, so the Faculty Advisor recommended the student consult with the Program Director first and if necessary, the Dean of Student Affairs. The student elects to meet with both the Program Director and the Dean. On advice from the Dean of Student Affairs, the student now requests a meeting of the key faculty involved in the possible recommendation of suspension.

Scenario Roles:

- Student
- Faculty Member
- Program Director
- Faculty Advisor
- Dean of Student Affairs
- Student’s Father (in the case of 6 fellows-in-training in the group)

Additional Cultural and Religious Background Information

The student is female and Muslim. In the Muslim religion, women must dress modestly. “Modest” means a woman should not show her arms, legs, feet, neck, or cleavage. A woman’s hair is considered an adornment and therefore needs to be covered as well since only her immediate family is allowed to see her hair. A woman wears a “hajib,” which is a “covering” of oneself or a covering between two persons. The specific head covering that is worn is known as a “Khimar”. Burka refers to a specific type of hajib; a one piece that covers the head, body, and the face. A “nikab” covers the face and hands, which may or may not reveal the eyes.

Holidays are based on the lunar calendar, so holidays will fall on different times of the year from one year to the next. All holidays begin at sunset the evening before and end at sunset. Daily prayers are required a minimum of 5 times per day: before sunrise, before noon, midday, at sunset, and in the evening. Prayers last 5 to 7 minutes and require a private space. “Community prayer” occurs at the mosque every Friday at 12:00 noon where everyone comes to pray. Community prayer is a requirement for men and may be optional for the woman, depending upon her circumstances (eg, children at home, working). There are 2 holidays in the Muslim religion. One holiday follows the month of Ramadan, “Eid-al-Fitr,” which lasts for one day. The second holiday, “Eid-Al-Adha,” is at the end of Hajj. At least once in a Muslim’s life they are supposed to go on a pilgrimage to Mecca to perform Hajj, during a specific time of year. When the pilgrimage is over and the fast concludes on Mt Arafat, there is a 3-day celebration called Eid-Al-Adha. In 2010, there were approximately 2,595,000 Muslim’s in the United States and in 2012 there were 62 million Muslims across the globe.



Education Leadership Institute
Scripted Scenarios (Based on Modules 4, 5, and 6)
2nd ELI Onsite Session



BACKGROUND INFORMATION (For Program Director and Dean of Student Affairs only)

A male faculty member on a tenure track e-mails negative student information to the program faculty using the University email system. The female student is Muslim who has a history of struggling in this faculty member's course and being non-responsive to offers of tutoring assistance. The student fails the course in question. She charges that the male faculty member was prejudiced about her as a Muslim because of a statement he made in class concerning her wearing of the hijab and so has appealed to the Program Director and Dean of Student Affairs. Her Faculty Advisor repeats some of what the male faculty member has criticized the student about. The academic program progression committee/academic integrity committee votes to recommended suspension of the student based on the report of the faculty member and her performance. The father of the student meets with EEOC and is considering filing a complaint of discrimination against the faculty member. The father asks to meet with the Program Director with his daughter to discuss her grade and the potential discrimination complaint. Upon criticism from the Program Director for how the faculty member communicated with the student in the course, the faculty member deletes the email. The Program Director subsequently discovers this email has been removed.



Education Leadership Institute
Scripted Scenarios (Based on Modules 4, 5, and 6)
2nd ELI Onsite Session

Information about Each Role: Program Director

Due to recent efforts by program faculty to increase diversity in the student body, the Program Director was pleased when this highly qualified Muslim female student applied to and was accepted into the program. The Program Director is unaware of any academic challenges noted for this student in the program until this class when she received the faculty member's e-mail about this student (the email that was sent to all faculty). The Program Director has received no complaints about this student from others (faculty, staff, and students). The father called the Program Director to discuss what happened to his daughter and the potential discrimination complaint against the faculty member and the academic program. Annual reviews of this faculty member have been satisfactory. The Program Director has advised the faculty member in the past that his humor may not be understood by others. The Program Director was contacted by the Dean of Student Affairs about this student's situation and recommended a meeting.

The Program Director also met with the faculty member to discuss his poor management of this situation. She also discovered recently that the email that was sent was removed from the system by a student assistant in Information Technology at the faculty member's request.



Education Leadership Institute
Scripted Scenarios (Based on Modules 4, 5, and 6)
2nd ELI Onsite Session



Information about Each Role: Dean of Student Affairs

The student met with the Dean of Student Affairs and shared her experience about this faculty member including comments expressed by the faculty member in class about her, and what she perceives to be an unusual offer for tutoring, which she believes constitutes discrimination. She reported receiving a failing grade in this class only and may face suspension from the physical therapy program. Following the meeting with the student, the Dean of Student Affairs contacted the Program Director to discuss the student's circumstances and to clarify the facts. The Dean recommended that all parties meet to discuss the situation and that the Program Director lead the discussion. Given the institution's recent strategic plan for increasing student diversity, the Dean of Student Affairs is very concerned about this case and perceptions about this case in the community.



Education Leadership Institute
Scripted Scenarios (Based on Modules 4, 5, and 6)
2nd ELI Onsite Session



Information about Each Role: Student

After talking with her father about off-color comments the faculty member made in class about her wearing of the hajib, his demeaning tone of voice and his unwillingness to help her in class, the student elects to pursue a meeting with the Program Director. The student requested a meeting to report that she believes the course director is prejudiced against her based on her religious practice and cultural beliefs because of a comment that the faculty member made publically during the class. Although she recognized her academic challenges in this class, she felt uncomfortable with the faculty member's offer of tutoring in his office after class. She believes her performance in this class is related to the discrimination she experienced from this faculty member. She has not experienced this from any other faculty member and is passing all other courses.



Education Leadership Institute
Scripted Scenarios (Based on Modules 4, 5, and 6)
2nd ELI Onsite Session



Information about Each Role: Faculty Advisor

Prior to learning of the student's failing grade in the course, the Faculty Advisory received an e-mail sent to the entire faculty from the faculty member/course director alerting them to this student's poor performance in the course, which is not standard procedure. The Faculty Advisor has some concern about the interaction between this faculty member and the student because of past off-color comments the faculty member made to other faculty about various students "offbeat" religions. In the past, the Faculty Advisor also recommended this particular student seek academic tutoring for prior coursework but the student did not follow through on the suggestion.



Education Leadership Institute
Scripted Scenarios (Based on Modules 4, 5, and 6)
2nd ELI Onsite Session



Information about Each Role: Faculty Member

The faculty member/course director questions the need for this meeting since his comment regarding the hajib in class was meant as a compliment and he believes he offered assistance several times to tutor her after class. He heard from other faculty members that he sometimes “goes too far” in his comments about students to his fellow faculty. He believes he has every right to share his opinions of students as well as faculty and staff. He believes this situation is a clear case of a student who is unqualified to be in this program.



Education Leadership Institute
Scripted Scenarios (Based on Modules 4, 5, and 6)
2nd ELI Onsite Session



Information about Each Role: Student's Father

The father of the student meets with EEOC and is considering filing a complaint of discrimination against the faculty member. The father asks to meet with the Program Director with his daughter to discuss her grade and the potential discrimination complaint. He has spoken with his daughter and has significant concerns about this situation and seeks to understand all aspects of this issue.

EDUCATION LEADERSHIP INSTITUTE FELLOWSHIP
Program Budget Negotiation Role Play Situation
3rd ELI Onsite Session

Directions: Each segment below will take 25 minutes to complete.

1. Each mentorship group (blue, green, orange) will divide into 2 subgroups; one group with 2 or 3 fellows-in-training and a mentor and the other group 3 fellows-in-training and a mentor.
 - a. In the group with a mentor and 2 fellows-in-training: 1 fellow-in-training plays the Dean while the other plays the program director.
 - b. In the group with a mentor and 3 fellows-in-training: 1 fellow-in-training plays the Dean, 1 fellow-in-training plays the program director, and 1 plays the assistant program director.
 - c. Mentors will observe the role play and pose questions of their team.
2. The mentorship subgroup will reconvene for a 25-minute discussion following the role play to discuss impressions, insights, etc.
3. Then the group will split again into 2 subgroups and change the makeup of the group the second time. The 2 groups will replay the role play situation a second time based on the discussion and observations shared to see how they would change the negotiation following feedback.

Description of the Role Play Situation:

Your academic institution requires that every academic program provide an annual program budget to their Dean and Vice President for Finance, where the budget cycle begins July 1 and ends June 30. Your current program is filled to capacity in the number of students accepted annually into your program (40 students). The institution has fallen on difficult times for the past 3 years with budget shortfalls and budget cuts in state funding to the institution by 20% annually. A CAPTE application for substantive change will be required for approval.

Your Dean has requested that your program increase its class size of 40 by 20% in the next fiscal year to accommodate this shortfall. This request is being made of all programs within the institution to respond to the fiscal crisis in this public institution to meet budget shortfall. You have an opportunity to shape the conditions under which your student class size would be increased by 20% and you know that you have sufficient numbers of qualified applicants to be able to expand your class.

Your role as program director and assistant program director is to make the case and negotiate for all of the necessary resources needed to accommodate a 20% increase in your class size to ensure a high quality program and to continue to meet accreditation standards. You will be meeting with your Dean to first negotiate your needs and requests and obtain his/her support prior to both of you meeting with the Vice President for Finance.

EDUCATION LEADERSHIP INSTITUTE FELLOWSHIP
Program Budget Negotiation Role Play Situation
3rd ELI Onsite Session

Dean

You have been informed by the Vice President for Finance and the President that there are minimal resources available from which to negotiate with program directors, despite the requirement to increase class size by 20% for all institutional programs. You have been charged by the Vice President for Finance to make as few, if any, concessions to program directors when meeting with them about the additional resources needed to accommodate this increase in class size request. You are aware that the institution is in financial distress and must increase its tuition revenues significantly to remain fiscally solvent before requiring faculty salary cuts or retrenchment of faculty and administrative positions. Your job is to be emotionally supportive of the program director and their requests, yet hold the line on requests that will impact the overall bottom line of the institution's margin to remain fiscally solvent.

Program Director and Assistant Program Director

You have presented this situation to your faculty and indicated that the need to increase class size by 20% is non-negotiable as all programs within the institution are being required to accommodate this request, given budget cuts over the past 3 years. Although faculty members are disgruntled about this request, you have enlisted their support in this process where they have articulated all of their resource needs to accommodate a 20% increase in the next entering class. Faculty have provided you with their list of needs that include an increase in the number of faculty, more classroom and laboratory space, additional equipment, increase in the number of clinical sites that are significantly in demand as a result of increasing number of developing programs, adjustments to workload distribution, shift in faculty time from research to teaching, provide more student advising, grading more papers, and supervision of more student research/capstone projects.

You now have a unique opportunity to represent your faculty and proactively influence how this change occurs by negotiating for the additional required resources needed to ensure an outcome that meets the needs of faculty and of accreditation. Consider all possible strategies to negotiate your needs and requests including leadership approaches and your best alternative to negotiated agreement (BATNA).

Questions for Mentor Observers:

1. What approaches did you observe the program director and assistant program director use in negotiating with the Dean that were most effective? Least effective?
2. What approaches did you observe the Dean using with the program director and assistant program director that were most effective? Least effective?
3. What leadership frameworks did you note throughout the negotiation by both parties?
4. What outcomes were achieved as a result of this negotiation?
5. How could the program director and assistant program director have more effectively navigated the various frameworks?
6. How might the program director and assistant program director plan to address the faculty and staff if the 20% increase in class size and subsequent increase in resources was not approved?
7. What strategies might the program director and assistant program director use to share with faculty the outcome from the meeting and obtain their buy in?

ELI FELLOWSHIP PROGRAM LEADERSHIP CASE AND ROLE PLAY

Case Scenario

APTA University, a state funded institution, is a 3-year professional DPT program located in the College of Health Professions. There are 40 students per class (matriculating in August every year for fall semester), and the clinical education component consists of 40 weeks of full-time clinical education experiences. There are 10 core physical therapy faculty and 4 associate faculty. The core physical therapy faculty with earned advanced degrees include 5 PhDs (2 with OCS; 1 with NCS), 3 DScs 1 with GCS), and 2 postprofessional DPTs (1 with OCS; 1 with NCS). The faculty are all active in clinical research and scholarly activity and 3 faculty members have external grants totaling \$2 million dollars. The DPT program is accredited by CAPTE without any current progress reports and scheduled for its next CAPTE On-Site visit for the fall of the following year with the reaccreditation self-study due in June.

You are the program director and chair of the DPT program and have been on faculty for 10 years. You have been in the program director position for two years and replaced a program director who retired after serving as program chair for 20 years. The remaining core faculty have been with the program for a minimum of two years. Another tenured physical therapist faculty member with 8 years of experience with the program was also a finalist for the program chair's position when it was available two years ago. The DPT program is accredited by CAPTE without any current progress reports required.

In January, the PT faculty member who was not chosen for the Chair's position, notified you and the Dean of the College that she would be leaving at the completion of the spring semester to start a new DPT program at a private university in a nearby city (approximately 20 miles away). In March, four of the PT faculty also notified you that they would be leaving the program at the end of the summer semester to join the new DPT program at the private university. The 5 PT faculty that are leaving the program includes two PhDs, two DScs, one postprofessional DPT, and these faculty members also represent specializations in NCS, PCS, and GCS. The current DCE is staying with the program.

Role Play

Program Director

It is March and you are now faced with one-half of your full-time core faculty (5 of the 10) leaving the program at the end of the 2016 summer semester. A new class of 30 professional DPT students is scheduled to matriculate into the program in August of this year. The 5 core PT faculty that are leaving include: 1) PhD, 2) PhD – NCS, 3) DSc – PCS, 4) DSc – GCS, and 5) postprofessional DPT - PCS. Of the five remaining PT faculty, there are three PhDs (one with OCS), 1DSc–OCS, and 1 postprofessional DPT–OCS. As noted above, the DCE will remain in her current position. Two of the four associate PT faculty are postprofessional DPT prepared with clinical specialization in NCS (1) and PCS (1). These 2 faculty members were lab assistants in the adult neurology and pediatric courses.

1. Discuss your plans for recruiting and replacing the 5 PT faculty members. Include in your discussion the need to adequately replace those faculty with the proper blend of degree and clinical specialization.
2. Discuss how you will explain the high attrition rate of experienced faculty when recruiting for their potential replacements.

**ELI FELLOWSHIP PROGRAM
LEADERSHIP CASE AND ROLE PLAY**

3. Anticipating that the new 5 PT faculty will not be available by August, what are your plans for starting the new school year with less than 10 PT faculty?
4. All of the PT core faculty members are tasked with writing the Self-Study Report (SSR) and you are the facilitator and editor of the final SSR. With the CAPTE On-Site Visit scheduled for November, what steps do you take to make sure the SSR is completed by the program's deadline of June of next year?
5. Discuss the need to contact CAPTE to request rescheduling of the CAPTE On-Site Visit set for November of this year to a Spring/Summer visit the following year. Are there potential drawbacks to this plan?
6. The 5 core PT faculty members who are leaving the program did not seem dissatisfied with their positions, teaching load, and service activities. However, since you have been chair, all PT faculty have been dissatisfied with their current pay and financial packages. You have voiced these concerns to the Dean – without any substantive change on his part. In retrospect, what else could you have done to prevent the departure of these 5 core PT faculty members?

Dean, College of Health Professions

1. You have been aware for approximately one year that the first PT faculty member who left was “hurt” that she was not chosen as the new Program Director/Chair 2 years ago. She was also less than satisfied with the current Chair's leadership and leadership style. In retrospect, what steps could you have taken with the faculty member that is leaving and the current Chair to rectify this situation?
2. You have been aware for some time (2 years) that the PT faculty have not been satisfied with their current pay and compensation packages. The PT faculty pay packages are similar to other College faculty and it should be noted that the PT program is the only doctoral prepared program within the College. What changes would you proposed and how would you go about addressing the salary issues with the PT faculty?
3. Faced with the fact that 5 core PT faculty members are leaving in the summer, discuss your steps to support the program chair and physical therapy program in; 1) faculty recruitment and hiring; 2) starting the fall semester with less than 10 PT faculty; and 3) necessity of changing the CAPTE On-Site Visit scheduled for November.
4. Discuss your plans to support the current Program Director/Chair during this period of significant program instability and change.



EDUCATION LEADERSHIP INSTITUTE FELLOWSHIP
SUMMARY ONE PAGE LEADERSHIP PROJECT WORKSHEET
July 29, 2015

APPENDIX O



Name: _____

1. Provide a brief description of your Leadership Project and progress achieved throughout the ELI Fellowship. Include your expected outcomes and when are they anticipated to occur.

2. What challenges did you face?

3. What lessons have you learned as a result of this leadership project?

4. If you had an ability to have changed something in your leadership project, what might that be?

5. What are your next steps in the project?

6. How has this project been reported to your academic institution and supervisor?

7. What 2 questions would you like to pose about your leadership project to your ELI colleagues?
 - 1.

 - 2.



Education Leadership Institute Fellowship Application

Application Overview

The Education Leadership Institute (ELI) Fellowship is an American Board of Physical Therapy Residency and Fellowship (ABPTRFE) accredited leadership development fellowship program created in response to the needs of the physical therapy education community. ELI is designed to develop current and future program administrators to facilitate the needed changes in the academic environment for the 21st century. The comprehensive curriculum explores in depth leadership development and is delivered through three required onsite sessions and ongoing distance learning. The yearlong format allows participants to connect theory with practice through application and translation of knowledge to their individual programs and institutions. For more detailed information, please click here: www.apta.org/eli

Major Content Areas Include:

- Personal Leadership and Management
- Higher Education, Healthcare Systems, and Society
- Institutional Leadership and Management
- Student Affairs
- Legal and Policy Issues
- Human Resource Management
- Resources and Financial Management
- Program Development and Outcomes
- Relationships, Influence, and Partnerships

Essential Features of ELI for Applicants to Consider

EXPECTATIONS AND TIME COMMITMENTS

The applicant should be prepared to:

- Complete a 2-hour virtual orientation webinar session in July that launches the ELI Fellowship program.
- Actively engage in on-line and self-directed learning in completing 9 learning modules with expert faculty throughout the fellowship year.
- Actively engage in three (3) required two-day face-to-face didactic instruction sessions in a 12-month period integrating content applied from each of the 9 modules. Required onsite sessions for 2016-2017 are as follows:
 - *Session 1: October 5-6, 2016 (location TBD)*
 - *Session 2: 2 days in March 8-9, 2017 (location TBD)*
 - *Session 3: 2 days in July 13-14, 2017 (location TBD)*
- Develop a leadership project that responds to a need within his/her sponsoring institution.
- Develop a dynamic leadership development plan through ongoing reflection during his/her participation in ELI.
- Complete all course, participant, and program assessments and evaluations.




Education Leadership Institute Fellowship Application

ELIGIBILITY CRITERIA

- The applicant should be a current or emerging leader or academic administrator.
- Due to the urgent need to prepare current and future academic administrators, preference will be given to applicants identified as novice (0 – 7 years) PT and PTA academic administrator leaders.
- The applicant must be a current member of the APTA.
- The applicant is CAPTE compliant if currently holding the position of PT or PTA program director.
- The applicant must be licensed/registered/certified or licensure eligible in the United States and affiliated with a U.S. academic institution.

Application Process

The applicant must:

- Complete the Application Form
- Complete a Letter of Intent
- Provide a Curriculum Vitae with evidence of past leadership activities updated in the past 3 months.
- Sign the Statement of Commitment
- Submit at the time of the application, a nonrefundable application processing fee of \$100.00.
- Secure nomination from current Program Director, Dean, or other appropriate Administrator/Supervisor. To access the Nomination Form for the Institution, click [here](#).
- Submit completed electronic application materials only accepted as **individual Word documents** to libbyross@apta.org by **January 15, 2016, 5:00 pm ET.** 

Application Form

APPLICANT INFORMATION (please Tab through to enter data)		
Name of Applicant:		
APTA Member ID Number:	Total Years in Full-Time Teaching Position:	
Institution:		
Current Academic Appointment:	<input type="checkbox"/> PT Program <input type="checkbox"/> PTA Program	Years in this position:
Academic rank:	Tenure Status (if applies):	
Address:		
City:	State:	Zip:
Work Phone: () - ext.	Cell Phone: () -	
E-Mail Work:	E-mail Home:	
US License/Registration Number(s):	Licensure State(s):	



Education Leadership Institute Fellowship Application

APPLICANT DEMOGRAPHICS

We recognize that diverse learning communities are valuable to leadership development, networking and the profession. While not required, we would appreciate your assistance in facilitating this desired outcome by responding to the demographic questions below.

Race/Ethnicity:	
<input type="checkbox"/> American Indian or Alaska Native	<input type="checkbox"/> Native Hawaiian or other Pacific Islander
<input type="checkbox"/> Asian	<input type="checkbox"/> White
<input type="checkbox"/> Black or African American	<input type="checkbox"/> Two or more races
<input type="checkbox"/> Hispanic/Latino	<input type="checkbox"/> Race and ethnicity unknown

Citizenship: US Citizen Foreign National

Age in years: ___

Gender: Male Female

LETTER OF INTENT

A strong application presents clear evidence of the applicant's potential for leadership in physical therapy education. To demonstrate this ability, the Letter of Intent should **be no longer than two (2) pages (no smaller than 10-font)** and must include each of the following bulleted items:

1. Describe one of the following:
 - a. A defining moment in your leadership journey.
 - b. What has facilitated your growth as a leader?
 - c. Your greatest leadership challenge.
2. Your future leadership career goals.
3. Describe one or more areas in which you hope to grow or learn through your participation in ELI.
4. Contributions you may make to the ELI Fellowship cohort through your participation.
5. Describe a need your institution may be facing that *might* be addressed through a leadership project.

CURRICULUM VITAE

Provide your Curriculum Vitae and include evidence of past leadership activities that has been updated within 3 months of this application.



Education Leadership Institute Fellowship Application

APPLICANT STATEMENT OF COMMITMENT

The application process includes a statement of commitment for all required activities. Please review the statement below and provide your signature to indicate your agreement.

As a member of the Education Leadership Institute, I commit to the year long obligation to the program, including: 1) virtual orientation webinar, 2) all on-site meetings as designated in this application (October, March, July) and required learning activities and discussions, 3) completion of 9 online modules and accompanying readings, assignments, discussion forums within an online community, virtual webinars, posttest assessment, and post module evaluations, 4) the construction of a leadership development plan, 5) the development and presentation of a leadership project to benefit my academic institution, and 6) ongoing program evaluations and assessments.

Signed:	Date (mm/dd/yy):
---------	------------------

APPLICATION PROCESSING FEE

As a part of the application process to the ELI Fellowship, a nonrefundable application processing fee of \$100.00 is required for all applicants. To provide payment, please click [here](#).

APPLICANT COVENANT

if accepted, all participants will be required to provide a signed covenant statement. Your signature will indicate your pledge to maintain confidentiality of the information concerning participants, academic institutions, and programs shared during ELI, and to uphold professional standards, including academic integrity and honesty.



APTA Education Leadership Institute Fellowship Fellow-in-Training Covenant

This covenant conveys an agreement for the participants, physical therapist and physical therapist assistant educators, about the expectations and professional behaviors in the yearlong Education Leadership Institute (ELI) Fellowship. The Education Leadership Institute Fellowship Work Group used available data, resources, other relevant leadership models, and professional expertise to design this program as a yearlong hybrid (online and face-to-face) model using expert faculty from outside physical therapy and experienced mentors within physical therapy. The intent of this covenant is to frame the boundaries for this program to ensure clarity and transparency for all involved participants. As such:

1. I agree to be an **active** and **engaged** participant in the Education Leadership Institute Fellowship, which includes online discussion forums, Share Point Community (e-community), Webinars, face-to-face session discussions, conference calls, and reflective engagement.
2. I will participate in the ELI Fellowship by maintaining the confidentiality that may result from the sharing of personal or academic institution-specific sensitive information. This information will remain within the boundaries of the program and will not be shared with others beyond those participating in this professional development program.
3. I agree to honor and participate in the assessment and evaluation process of ALL elements of the ELI Fellowship and complete these assessments candidly, in a timely manner, and to provide ongoing feedback for the purposes of program enhancements and research.
4. I will act in a manner that validates the value of every fellow-in-training, faculty member, mentor, ELI Fellowship Work Group member, and APTA Program Director; moreover, I will value the contribution of each fellow-in-training, faculty member, and mentor on its merits.
5. I agree that the Education Leadership Institute Fellowship can be a “gain-gain” proposition; a personal gain in terms of enlightenment, professional development, and self-esteem; academic institutional gain in terms of project implementation, leadership development, and credibility; the profession’s gain in terms of future physical therapy education and profession leadership, future mentorship, and as an ambassador for the Education Leadership Institute Fellowship.
6. I understand that all ELI Fellowship modules are protected under the United States copyright law and may not be reproduced in any manner without express permission of the American Physical Therapy Association (APTA). Viewing or purchasing a module entitles you to download and print only 1 copy of any module materials. If this module presented in a downloadable format, it may be downloaded and stored on a single computer or moved to and used on another computer. The module and any portion thereof may not be copied or disseminated in any print or electronic form without the express written consent of APTA. If you are interested in obtaining a broader license, contact [APTA](#).
7. I understand that the ELI Fellowship program will share at orientation, the American Board of Physical Therapy Residency and Fellowship Education’s (ABPTRFE) grievance policy that specifies procedures to file a formal complaint about a credentialed program, should the circumstances ever warrant. .

ELI Fellow-in-Training Printed Name

ELI Fellow-in-Training Signature

Date

Sep 27 2015 **Education Leadership Conference - ELI Networking Breakfast**

Actions ▾



Posts: 132
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Jody Shapiro Frost, PT, DPT, PhD, FNAP

Education Leadership Conference - ELI Networking Breakfast

September 27, 2015 03:50 PM

Hi ELI Fellows!

We are looking forward to seeing many of you at the Education Leadership Conference as well as Saturday's ELI Networking Breakfast from 7:00 - 9:00am ET in the Hyatt Hotel in rooms Chesapeake A & B. There will be time to reconnect with colleagues from your cohort as well as meet other new ELI Fellows from the recent graduating cohort as well as current enrolled fellows-in-training. Once again you will be seated by your mentorship group color so look for name plates with orange, blue, and green and take a seat at the table and help yourself to breakfast.

There will be questions at each question in small groups and then time set aside for 2 questions as a plenary session where we want to hear from all of you!! Looking forward to our annual networking "reunion" and opportunity to continue the leadership conversations!

Finally, please remember to pack and wear your ELI Fellow pins and ribbons proudly. Come find me if you do not have your ribbon and I will have extra ribbons available for you to place on your badge for other attendees to easily connect with ELI Fellows since we know that this is one way that new applicants to the program learn about ELI!

We look forward to our precious time together and the opportunity to network, share, and as always continue the leadership conversations!!!

REPLY QUOTE REPLY

About this Topic

ELI Graduates Updates

ELI Graduates Updates



Category: ELI Graduates
 Email: eligrads.upd@lists.communities.apta.org
 Community: ELI Graduates

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- Subscribe to Thread
- User Preferences
- Back to Community



EXPECTATIONS OF ELI FELLOWS-IN-TRAINING, MENTORS, FACULTY, AND PROGRAM DIRECTOR ELI FELLOWSHIP 2015-2016

Expectations for Fellows-in-Training

- 1) General Program: Participants actively engage in the Education Leadership Institute Fellowship with an expectation of professional development, contributions to their academic institution through leadership project implementation, and serving as future physical therapy education and profession leaders, mentors, and ambassadors for the Education Leadership Institute Fellowship.
- 2) Covenant: Participants sign a covenant agreeing to be an **active** participant in the Education Leadership Institute Fellowship, which includes completion of all online module coursework, posttest assessments and Learning Center post module assessments for CEUs, participating in discussion forums and/or live faculty webinars (a least one for each module), ELI Program post-module assessments, HUB Community (e-community), Webinars, 3 onsite session discussions and post onsite assessments, conference calls, mentorship assessments, ELI Fellowship new graduate, 1, 3, and 5 year post program assessments, and reflective engagement.
- 3) Online Modules: The ELI Fellowship curriculum consists of 9 online modules provided throughout the yearlong program. It is expected that participants will complete the online modules in preparation for each onsite session, complete the assigned readings and activities, post comments in response to questions posed by ELI faculty in each module and participate synchronously during at least one of the 3 virtual hour office sessions for faculty discussion forums and faculty live Webinars for each module. Fellows-in-training must successfully pass each post-module assessment with $\geq 70\%$ score in the APTA Learning Center to earn CEUs.
- 4) Fellow-in-Training Leadership Reflection Worksheets: As a component of ELI, all participants are expected to complete leadership reflections worksheets in developing leadership plans. These reflections change and evolve as the fellow-in-training progresses through ELI. Components of the reflections worksheet may involve mentors, other ELI fellows-in-training, mentors and individuals from the sponsoring institution/organization, and other professionals within and external to physical therapy.
- 5) Leadership Project In Support of Your Academic Institution: Each fellow-in-training will design a leadership project that supports and is approved by their respective institution/organization. This project may include individuals within your institution/organization required to support you to enable you to realize the achievement of the project. It is expected that the leadership project will be fully designed however, given available time, may not be fully completed within the one year time frame. Fellows-in-training will discuss their leadership projects in summary form during the 3rd ELI Onsite session. There may be additional opportunities to share leadership projects during the Education Leadership Conference sponsored by the Education Section and ACAPT through presentations and a printed booklet.
- 6) ELI Assessments: Data for the ELI Fellowship needs to be captured to encompass a broad spectrum of information. The program does not make an unreasonable burden, however we expect your assistance to candidly complete all of the assessments associated with ELI, provide ongoing feedback, and assist us in streamlining these assessments for the future. Assessments include admissions survey, 3 post onsite sessions, 9 ELI online module post assessments, 9 APTA CEU module assessments, 9 module posttest assessments for CEUs, mentorship assessments (4) during



EXPECTATIONS OF ELI FELLOWS-IN-TRAINING, MENTORS, FACULTY, AND PROGRAM DIRECTOR ELI FELLOWSHIP 2015-2016

each onsite session, weekly mentorship Excel Tracking Spreadsheet collected at the end of the fellowship, one ELI Fellow Graduate assessment, post ELI Fellow graduate survey at 1, 3, and 5 years, and completion of a one-page summary about the ELI Fellowship for ELC.

- 7) Fellow-in-Training Mentorship Tracking Spreadsheet – All fellows-in-training are required to complete a fellow-in-training mentor tracking spreadsheet that monitors, on a weekly basis, the time spent engaged in fellowship program activities with various mentorship components such as ELI mentors, institution mentors, completing assignments meeting designated institutional administrators, completing online module requirements, etc. The mentorship tracking spreadsheet will be submitted to the Program Director at the end of the ELI Fellowship program.
- 8) Meetings with Your Dean/Direct Supervisor – Fellows-in-training are required to arrange for regular and ongoing meetings with their Dean/Program Director/Supervisor throughout ELI to ensure that there is ongoing communication and mentorship occurring within your institution. The purposes of these meetings are to 1) communicate and share with your supervisor content and concepts learned, 2) provide ongoing progress regarding your leadership development with feedback, and 3) provide mentorship for your institution-specific leadership development project. Your Dean/Direct Supervisor will be receiving a survey to complete upon your graduation from the ELI Fellowship program as well as a new graduate and 1 year post ELI Fellowship.

Expectations for All Involved Stakeholders

- 1) Fellows-in-training, mentors, faculty, Program Director, and ELI Fellowship Work Group members are required to maintain confidentiality from personal or academic institution-specific sensitive information shared throughout ELI. This information will remain within the boundaries of the Education Leadership Institute Fellowship program as detailed in the covenant, which applies to all who are involved with this fellowship program.
- 2) Every fellow-in-training, mentor, faculty, ELI Fellowship Work Group member, and Program Director will respect and value the contributions of each fellow-in-training, faculty member, and mentor on their merits.
- 3) Mentors, faculty, and Program Director serve as role models and educational leaders in working with fellows-in-training.

ELI Fellows-in-Training and Mentors

First	Last	Degrees	ELI Role	Institution	State	PT/ PTA Prg	Position	Email	Mentors	Group Color
Scott	Bennie	PT, DSc, MBA	Fellow-in-Training	Adventist University	FL	PT	Vice Chair & Associate Professor	scott.bennie@adu.edu	Emery/ Peel	BLUE
John	Buford	PT, PhD	Fellow-in-Training	Ohio State University, The	OH	PT	Program Director	buford.5@osu.edu	Emery/ Peel	BLUE
Ashraf	Elazazi	PT, PhD	Fellow-in-Training	Utica College	NY	PT	Interim Chairperson	aelazza@utica.edu	Emery/ Peel	BLUE
Michael	Emery	PT, EdD, FAPTA	Mentor	Sacred Heart University	VT	PT	Emeritus Program Director	emerym@sacredheart.edu	Emery/ Peel	BLUE
Karen	Gordes	PhD, PT, DScPT	Fellow-in-Training	University of Maryland - Baltimore	MD	PT	Director of Faculty & Student Affairs	kgordes@som.umaryland.edu	Emery/ Peel	BLUE
Claire	Peel	PhD, PT, FAPTA	Mentor	University of North Texas	TX	PT	Dean, School of Health Professions	Claire.Peel@unthsc.edu	Emery/ Peel	BLUE
Debbie	Silkwood-Sherer	DHS, PT, HPCS	Fellow-in-Training	Central Michigan University	MI	PT	Program Director	silkw1d@cmich.edu	Emery/ Peel	BLUE
Priscilla	Weaver	PT, PhD, DPT, PCS	Fellow-in-Training	Bradley University	IL	PT	Assistant Professor and Director of Clinical Education	pweaver@fsmail.bradley.edu	Emery/ Peel	BLUE
Donna	Bowers	PT, DPT, MPH, PCS	Fellow-in-Training	Sacret Heart University	CT	PT	Assistant Program Director	bowersd@sacredheart.edu	Jette/ Mayhew	GREEN
Tricia	Catalino	PT, DSc, PCS	Fellow-in-Training	Touro University	NV	PT	Associate Professor	tricia.catalino@tun.touro.edu	Jette/ Mayhew	GREEN
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Diane	Jette	PT, DSc, FAPTA	Mentor	MGH Institute of Health Professions	MA	PT	Associate Chair, Professor	djette@mghihp.edu	Jette/ Mayhew	GREEN

ELI Fellows-in-Training and Mentors

First	Last	Degrees	ELI Role	Institution	State	PT/ PTA Prg	Position	Email	Mentors	Group Color
Emmanuel	John	PT, DPT, PhD, MBA	Fellow-in- Training	Chapman University	CA	PT	Chair and Associate Professor	john@chapman.edu	Jette/ Mayhew	GREEN
Thomas	Mayhew	PT, PhD	Mentor	Virginia Commonwealth University	VA	PT	Immediate Past Chair of Department, Current Program Director of the DPT Program	tmayhew@vcu.edu	Jette/ Mayhew	GREEN
JJ	Mowder- Tinney	PT, PhD, NCS, C/NDT, CSRS, CEEAA	Fellow-in- Training	Nazareth College	NY	PT	Associate Professor	jmowder3@naz.edu	Jette/ Mayhew	GREEN
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Kelly	Musti	PT, DPT	Fellow-in- Training	Lackawanna College	PA	PT	Academic Coordinator of Clinical Education	mcgovernk@lackawanna.edu	Lake/ Reese	ORANGE
Kirk	Peck	PT, PhD, CSCS, CCRT	Fellow-in- Training	Creighton University	NE	PT	Interim Chair and Assistant Professor	KIRKPECK@creighton.edu	Lake/ Reese	ORANGE
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ELI Fellows-in-Training and Mentors

First	Last	Degrees	ELI Role	Institution	State	PT/ PTA Prg	Position	Email	Mentors	Group Color
Libby	Ross	MA	Staff	APTA	VA	N/A	Director, Academic Services	libbyross@apta.org	N/A	N/A



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Education Leadership Institute (ELI) Fellowship
Fellows-in-Training Roster
2016-2017

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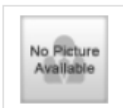
ELI Application Deadline Extension Notice to Stakeholders

Current 2015-2016 Cohort

Jan 12
2016

ELI Application Deadline for 2016-17 Cohort Extended to March 1

Actions ▾



Posts: 44

My Page

Elisabeth J. Ross, MA

ELI Application Deadline for 2016-17 Cohort Extended to March 1

January 12, 2016 11:43 AM

Based on feedback from the ELI Work Group, APTA will extend the ELI application deadline for the 2016-17 (next) cohort to March 1. Below is a message that will be sent via the Education Section and ACAPT later this week. Staff will also post the revised date on the ELI webpages and Hub, and notify other stakeholders.

RE: ELI Application Deadline Extended to March 1

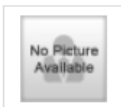
Good news! APTA has extended the application deadline for the 2016-17 Educational Leadership Institute (ELI) Fellowship to March 1. ELI is a yearlong, ABPTRFE-accredited fellowship program designed to develop innovative and influential leaders in physical therapy education. Novice (0-7 years) and emerging leaders in PT and PTA education programs, as well as directors of residency and fellowship programs affiliated with an academic institution, are invited to apply. To learn more about ELI, visit <http://www.apta.org/ELI/> or contact libbyross@apta.org. If attending CSM, also visit the ELI table at the Career Development Reception in the Platinum Ballroom 6 at the Anaheim Marriott on Friday, February 19, from 8:00 to 10:00 pm. Please share this announcement with prospective candidates

REPLY QUOTE REPLY  

[Forum Home](#) :: [ELI Program 2015-2016](#) :: [ELI Program 2015-2016 Updates](#) :: [Top of Page](#)

Jan 12
2016**ELI Application Deadline for 2016-17 Cohort Extended to March 1**

Actions ▾



□ Posts: 44

👤 My Page

Elisabeth J. Ross, MA

ELI Application Deadline for 2016-17 Cohort Extended to March 1

January 12, 2016 11:53 AM

Based on feedback from the ELI Work Group, APTA will extend the ELI application deadline for the 2016-17 (next) cohort to March 1. Below is a message that will be sent via the Education Section and ACAPT later this week. Staff will also post the revised date on the ELI website and Hub, and notify other stakeholders.

RE: ELI Application Deadline Extended to March 1

Good news! APTA has extended the application deadline for the 2016-17 Educational Leadership Institute (ELI) Fellowship to March 1. ELI is a yearlong, ABPTRFE-accredited fellowship program designed to develop innovative and influential leaders in physical therapy education. Novice (0-7 years) and emerging leaders in PT and PTA education programs, as well as directors of residency and fellowship programs affiliated with an academic institution, are invited to apply. To learn more about ELI, visit <http://www.apta.org/ELI/> or contact libbyross@apta.org. If attending CSM, also visit the ELI table at the Career Development Reception in the Platinum Ballroom 6 at the Anaheim Marriott on Friday, February 19, from 8:00 to 10:00 pm. Please share this announcement with prospective candidates.

Please contact me, if questions. Thank you and happy New Year!

Libby J. Ross, MA

Director, Academic Services

American Physical Therapy Association

703-706-3326 (direct) or 800-999-2782, ext. 3326 (toll free)

libbyross@apta.org

REPLY QUOTE REPLY

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Does applicant meet eligibility criteria? (Y/N)	➤ Applicant is a current APTA member. If no, no further consideration of applicant.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	➤ Applicant is licensed/registered/certified or licensure eligible in the United States.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	➤ If not, no further consideration of the applicant.	
	➤ Applicant is CAPTE compliant if currently holding the position of PT or PTA program director; ABPTRFE compliant if holding the position of Residency/Fellowship Program Director.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	➤ If no, no further consideration of applicant.	
Nomination (5)	4-5 = High/strong commitment and opportunity/enthusiastic narrative. 2-3 = Recommended/lukewarm commitment or opportunity/equivocal narrative. 0-1 = Reservation/weak commitment or opportunity/negative narrative. If 0, determine if application gets further consideration.	/ 5
Curriculum Vitae (CV)/LOI: Experience (5)	5 = 0-7 years as PT or PTA academic administrator/residency and fellowship director (<i>not DCE/ACCE</i>) 4 = Aspiring and eminent for an academic administrator position. 3 = Aspiring but not eminent for academic administrator position. 2 = 8-12 years as PT or PTA academic administrator and/or practitioner. 1 = > 12 years as PT or PTA academic administrator and/or practitioner.	/ 5
CV: Progressive Leadership (2)	2 = Several (≥5) past leadership experiences. 1 = Few (1-4) past leadership experiences. 0 = No past leadership experience.	/ 2
Applicant Letter of Intent (LOI) (2)	2 = Thoughtful reflection about leadership experiences. 1 = Superficial reflection about leadership experience. 0 = No reflection on leadership experience.	/ 2
Applicant LOI: Future Career Goals (2)	2 = Envisions role as PT/PTA academic administrator, consistent with education and experience. 1 = Envisioned role not consistent with education and experience. 0 = Unclear goals relative to PT/PTA academic administrator.	/ 2
Applicant LOI: Hopes for ELI (2)	2 = Hopes well-articulated, consistent with ELI objectives. 1 = Hopes less well articulated, less consistent with ELI objectives. 0 = Hopes not articulated, or not consistent with ELI objectives.	/ 2
Applicant LOI: Contributions to ELI (2)	2 = Contributions well-articulated, should contribute to group process. 1 = Contributions less well articulated, unclear contribution to group. 0 = Contributions not articulated, or would detract from group.	/ 2
Applicant LOI: Issue Project (2)	2 = Thoughtful identification of an issue that could be realistically addressed in the ELI project. 1 = Less thoughtful, less realistic issues identified. 0 = Issue not identified or not a match with ELI.	/ 2
TOTAL SCORE		0 / 22



<p>Plus Factors (Y/N)</p>	<p>➤ Does applicant bring other intangibles to the program that contribute to leadership potential, diversity, or group dynamics but may not be reflected in the rubric (eg, life experience in different culture, racial or ethnic diversity, experience as another type of professional prior to PT, etc).</p>	<p><input type="checkbox"/> Yes <input type="checkbox"/> No</p>
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Comments:

Education Leadership Institute Fellowship: Fellow-in-Training Mentorship Log: 2016-2017

Onsite Meeting	Module Launch	Dates	Week	Module Assigned Readings (hours)	Module Journal Entries (hours)	Module Activities (eg, Stop and Think, Written) (hours)	ELI Virtual Office Hour Webinars (hours)	ELI Faculty Discussion Forums (hours)	ELI Subgroup Mentorship Conference Calls (hours)	ELI Onsite Meetings (hours)	Meetings/ interactions with institution administration /staff (eg, President, Provost, Dean, HR, Legal Council, Student Affairs, etc) (hours)	Weekly Total	
Orientation Webinar	1	Jul 3-9, 2016	1									0.0	
		Jul 10-16, 2016	2									0.0	
		Jul 17-23, 2016	3									0.0	
		Jul 24-30, 2016	4									0.0	
	2	Jul 31-Aug 6, 2016	5										0.0
		Aug 7-13, 2016	6										0.0
		Aug 14-20, 2016	7										0.0
		Aug 21-27, 2016	8										0.0
		Aug 28-Sep 3, 2016	9										0.0
	3	Sep 4-10, 2016	10										0.0
		Sep 11-17, 2016	11										0.0
		Sep 18-24, 2016	12										0.0
		Sep 25-Oct 1, 2016	13										0.0
1st Onsite	4	Oct 2-8, 2016	14									0.0	
		Oct 9-15, 2016	15									0.0	
	Oct 16-22, 2016	16										0.0	
	Oct 23-29, 2016	17										0.0	
	Oct 30-Nov 5, 2016	18										0.0	
	Nov 6-12, 2016	19										0.0	
	Nov 13-19, 2016	20										0.0	
	Nov 20-26, 2016	21										0.0	
	5	Nov 27-Dec 3, 2016	22										0.0
		Dec 4-10, 2016	23										0.0
		Dec 11-17, 2016	24										0.0
Dec 18-24, 2016		25										0.0	

Education Leadership Institute Fellowship: Fellow-in-Training Mentorship Log: 2016-2017

Onsite Meeting	Module Launch	Dates	Week	Module Assigned Readings (hours)	Module Journal Entries (hours)	Module Activities (eg, Stop and Think, Written) (hours)	ELI Virtual Office Hour Webinars (hours)	ELI Faculty Discussion Forums (hours)	ELI Subgroup Mentorship Conference Calls (hours)	ELI Onsite Meetings (hours)	Meetings/ interactions with institution administration /staff (eg, President, Provost, Dean, HR, Legal Council, Student Affairs, etc) (hours)	Weekly Total
		Dec 25-31, 2016	26									0.0
		Jan 1-7, 2017	27									0.0
		Jan 8-14, 2017	28									0.0
	6	Jan 15-21, 2017	29									0.0
		Jan 22-28, 2017	30									0.0
		Jan 29-Feb 4, 2017	31									0.0
		Feb 5-11, 2017	32									0.0
		Feb 12-18, 2017	33									0.0
		Feb 19-25, 2017	34									0.0
		Feb 26-Mar 4, 2017	35									0.0
2nd Onsite		Mar 5-11, 2017	36									0.0
	7	Mar 12-18, 2017	37									0.0
		Mar 19-25, 2017	38									0.0
		Mar 26-Apr 1, 2017	39									0.0
		Apr 2-8, 2017	40									0.0
		Apr 9-15, 2017	41									0.0
		Apr 16-22, 2017	42									0.0
	8	Apr 23-29, 2017	43									0.0
		Apr 30-May 6, 2017	44									0.0
		May 7-13, 2017	45									0.0
		May 14-20, 2017	46									0.0
		May 21-27, 2017	47									0.0
		May 28-Jun 3, 2017	48									0.0
	9	Jun 4-10, 2017	49									0.0
		Jun 11-17, 2017	50									0.0

Education Leadership Institute Fellowship: Fellow-in-Training Mentorship Log: 2016-2017

Onsite Meeting	Module Launch	Dates	Week	Module Assigned Readings (hours)	Module Journal Entries (hours)	Module Activities (eg, Stop and Think, Written) (hours)	ELI Virtual Office Hour Webinars (hours)	ELI Faculty Discussion Forums (hours)	ELI Subgroup Mentorship Conference Calls (hours)	ELI Onsite Meetings (hours)	Meetings/ interactions with institution administration /staff (eg, President, Provost, Dean, HR, Legal Council, Student Affairs, etc) (hours)	Weekly Total
		Jun 18-24, 2017	51									0.0
		Jun 25-Jul 1, 2017	52									0.0
		Jul 2-8, 2017	53									0.0
3rd Onsite		Jul 9-15, 2017	54									0.0
Logs Due		Jul 16-22, 2017	55									0.0
				Assigned Readings	Module Journal Entries	Activities (eg, Stop and Think, Written)	ELI Virtual Office Hour Webinars	ELI Faculty Discussion Forum	Mentorship Conference Calls	ELI Onsite Meetings	Meetings/Interactions with Institution Administration/Staff	0.0
			SUM (hrs)	0.0	0.0	0.0		0.0	0.0	0.0	0.0	Grand Total in Hours

ELI Program 2015-2016

[Add Calendar Item](#) [Actions](#)



Exclusive to ELI mentors, ELI fellows-in-training, ELI Fellowship Workgroup members, and the ELI Fellowship Program Director.
The ELI Program 2015-2016 community provides information and resources for those involved in the ELI Fellowship Program, including the Orientation Webinar and three ELI Onsite Sessions. Contact libbyross@apta.org with questions.

ELI Program 2015-2016 Calendars		
▼ Calendar Options		
Calendar:	All Calendars	
Calendar Items During:	Current Year	
View As:	List	
Name	Start Time	End Time
Module 5 - 3rd Webinar (Milam)	January 14, 2016 - 02:00 PM	January 14, 2016 - 04:00 PM
Module 6 - Scheduled Launch	January 19, 2016 - 06:00 PM	January 19, 2016 - 06:30 PM
Call for ELI Mentors Only	January 20, 2016 - 01:00 PM	January 20, 2016 - 02:00 PM
Module 6 - Forum (Kemper) #1	January 29, 2016 - 10:00 AM	January 29, 2016 - 12:00 PM
Hotel Reservation Deadline - 2nd Onsite Session	February 8, 2016 - 05:00 PM	February 8, 2016 - 05:00 PM
Module 6 - Webinar (Kemper) #2	February 10, 2016 - 11:00 AM	February 10, 2016 - 01:00 PM
Module 6 - Forum (Kemper) #3 NEW DATE	February 23, 2016 - 02:00 PM	February 23, 2016 - 02:00 PM
ELI Application Deadline for 2016-17 (Next) Cohort	March 1, 2016 - 05:00 PM	March 1, 2016 - 05:00 PM
Deadline for Module 4,5,6 Questions	March 4, 2016 - 05:00 PM	March 4, 2016 - 05:00 PM
2nd ELI Onsite Session	March 10, 2016 - 07:30 AM	March 11, 2016 - 03:30 PM
Deadline for Assessments of Modules 4,5,6 + 2nd Onsite	March 18, 2016 - 12:00 PM	March 18, 2016 - 12:00 PM
Module 7 - Scheduled Launch	March 18, 2016 - 05:00 PM	March 18, 2016 - 05:00 PM
Module 7 - Forum (Gehen) #1	March 29, 2016 - 08:00 PM	March 29, 2016 - 10:00 PM
Module 7 - Webinar (Gehen) #2	April 9, 2016 - 10:00 AM	April 9, 2016 - 12:00 PM
Confirm Name and Degree for Graduation Program	April 15, 2016 - 05:00 PM	April 15, 2016 - 05:00 PM
Module 7 - Forum (Gehen) #3	April 20, 2016 - 07:00 PM	April 20, 2016 - 09:00 PM
Module 8 - Scheduled Launch	April 29, 2016 - 05:00 PM	April 29, 2016 - 05:00 PM
Module 8 - Webinar (Mundhenk) #1	May 10, 2016 - 02:00 PM	May 10, 2016 - 04:00 PM
Module 8 - Forum (Mundhenk) #2	May 14, 2016 - 09:00 AM	May 14, 2016 - 11:00 AM
Module 8 - Webinar (Mundhenk) #3	May 24, 2016 - 12:00 PM	May 24, 2016 - 02:00 PM
Deadline for Guest List and Dietary Needs at ELI Graduation	June 1, 2016 - 05:00 PM	June 1, 2016 - 05:00 PM
Module 9 - Scheduled Launch	June 3, 2016 - 05:00 PM	June 3, 2016 - 05:00 PM
Module 9 - Forum (Waddill) #1	June 16, 2016 - 08:00 PM	June 16, 2016 - 10:00 PM
Deadline for ELI Hotel Reservations	June 17, 2016 - 05:00 PM	June 17, 2016 - 05:00 PM
Module 9 - Forum (Waddill) #2	June 20, 2016 - 08:00 AM	June 20, 2016 - 10:00 AM
Module 9 - Webinar (Waddill) #3	June 22, 2016 - 07:00 PM	June 22, 2016 - 09:00 PM
Deadline for Leadership Project Worksheet Summary	July 6, 2016 - 11:55 AM	July 6, 2016 - 11:55 AM
Deadline for Module 7, 8, and 9 Questions for 3rd Onsite	July 6, 2016 - 12:55 PM	July 6, 2016 - 12:55 PM
Deadline for Supervisor's Information	July 6, 2016 - 12:55 PM	July 6, 2016 - 12:55 PM
Review Leadership Project Worksheets for Other Fellows	July 7, 2016 - 05:00 PM	July 12, 2016 - 11:55 PM
3rd ELI Onsite Session and Graduation	July 13, 2016 - 07:30 AM	July 14, 2016 - 10:00 PM
Deadline for Assessments of Modules 7-9	July 31, 2016 - 12:55 PM	July 31, 2016 - 12:55 PM
Deadline for Leadership Summary Booklet Form	July 31, 2016 - 12:55 PM	July 31, 2016 - 12:55 PM

Faculty Webinar Session
First ELI Onsite Session – Baltimore, MD
September 30, 2015; 1:00 – 3:00 pm EST

Module 1: Personal Leadership and Management – Dr Lynn Gangone

Leadership Frames and Issues

1. Are there techniques that can help one improve their ability to apply frames in response to various situations? (Lynn Millar)
2. How important do you think it is to try to utilize a balance among the 4 leadership frames versus utilizing predominantly 1 or 2 frames as a leader of an academic unit? (Tracy Brudvig)
3. I feel like the Political Frame has more negative assumptions and connotations associated with it compared to the other frames. I very much understand why, and have a fairly good example having observed a new president that operates from a political frame (having made some behind-closed-doors decisions that have led many to quietly distrust him, yet in public he is a different person). As someone who has aspirations of higher-level leadership positions, and also operates primarily from the political frame, are there positive examples of strong leaders in high level positions who operate from the political frame? (Stacie Fruth)
4. As I assessed my results from the Bolman and Deal Leadership quiz (#1 Structural/#2 Human Resource) and reviewed the leadership practices from Kouzes and Posner, I realized I have difficulty dreaming about the future. I am very practical, logical, and detail oriented and get stuck in the details even when trying to think outside the box. What advice can you offer to help me shift my frame of reference so I freely dream in order to inspire a shared vision? (Joy Karges)
5. As you begin to change the structure of meetings to facilitate more interaction or collaboration by including all frames at what point do you stop trying to incorporate an individual(s) that may be resistant to change? For example, you are attempting to work with a person with a structural frame and they are having difficulty in the changes that were made to meeting to facilitate discussion for a member with a human resource frame. At what point do you stop with the discussion? (Ivan Mulligan)
6. In implementing the Strategy of Insightful Leadership as well as the Kouzes & Posner action steps for effective leadership, is it really possible to effect change in an authoritarian-leadership style that is permeated at all levels of an institution? (Catherine Ortega)
7. How do you see the theories of process leadership and trait leadership interacting? Do they occur together? (Diane Wrisley)
8. How can one encourage appreciative leadership in an organization? (Diane Wrisley)

Leadership and Diversity

9. At one point during a discussion in this unit you mentioned (to paraphrase) that anytime you sat down to a table for a meeting, you made note of who was there, and likewise, who wasn't. We utilized this as a launch point for a discussion on promotion of diversity within institutions. Assuming that being "at the table" implies a level of leadership already, what are some strategies that you have found successful to promote diversity in academic administration from those who are not "at the table", or are not currently in what is viewed as a leadership position? (Teresa Brown)



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Tempered Radicals

10. How does a “tempered radical” know when to push and when to hold back? How does he/she rock the boat without tipping it over? (Howell Tapley)
11. Regarding tempered radicals, all of us located in Schools of Medicine are, by definition, tempered radicals, being non-MDs in an MD’s world. But, more to the point, I am the Chief of the Division of PT within the Department of Orthopaedics. I am therefore an educational division in a clinical department. It is very difficult to make my boss, who is an orthopaedic surgeon, understand that contact hours of teaching represent a small amount of the total hours necessary to be an effective teacher. What resources are available that could help me educate him to that fact? (Burke Gurney)

Leadership Pathway

12. If you could go back and train for your current leadership position, what single skill/knowledge would you focus on? How do you know (or did you know) you are ready to accept a leadership position? Is there such a thing as certainty or do you just make the jump knowing as much as you possibly can? (Myles Quiben)

Self-Assessment and Self-Reflection

13. Self-reflection has been outlined as a needed practice in building leadership skills. Can you please describe ways to encourage self-reflection and self-assessment in others? Are there specific activities that they have used to foster self-assessment skills in those they have worked with? Thinking specifically of how difficult it is to get any of us to see what we don't want to see in ourselves. (Melanie Heffington)
14. In Madsen’s book *On Becoming a Woman Leader* the focus seemed to be on seeking opportunities for personal leadership growth. Becoming a strong leader seems that it would be mutually beneficial to the person and organization. However, an end result of many of the stories discussed moving on to other jobs once they felt they were no longer challenged in their current positions. Similarly, faculty members may be involved in activities at work that have a major benefit to themselves, but only a marginal benefit to the program. Do you feel this represents a conflict of interest in any way, and if so, how would you address it? (Ed Mahoney)

Emotional Intelligence

15. There has been a lot of discussion lately in our College about Emotional Intelligence (EI) and whether at the graduate level we should screen for EI through the admissions process, or work to foster it among our students in a formal way. (At the undergraduate level, everyone is in agreement that it should be taught.) My question is do people see Appreciative Leadership as a way to improve EI among faculty and students, or does addressing EI need to be more explicit? (Adrienne McAuley)

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16. I was speaking with one of my DPT faculty members and he says he really wants to see me get mad one day, that I am always too judicious. Not that I don't offer my opinion, but he doesn't see me "lose my head". I rarely do, at least not professionally. I think I temper that side at work. I have emotion, but it doesn't run the full spectrum. I think you lose people when you "lose your head" and you just can't always win them back. My old Director would "lose his head" a lot. He was known for banging his shoe on the Dean's desk, was not well liked in the upper management, but he was fun to work for...you knew he would protect you, go to bat for the program and really lay it out there. Maybe he appeared that he cared more than me and maybe that is why my faculty member wants to see me get mad, to make sure I do care enough. Maybe I need more emotion in my dealings? Maybe there is another way to show I care than raising my blood pressure and screaming...I would prefer an alternative approach. Any suggestions? (Stacy Fritz)

Module 2: Higher Education, Healthcare, and Society – Dr Charlotte Royeen

Higher Education Issues (Funding, Institutional Classifications, Tenure, Population Demographics, Teaching and Curriculum Orientation)

17. *Funding* is discussed as one of the future trends affecting physical therapy education. Obviously the goal is to find alternative sources of funding other than just tuition dollars, but tuition seems to be increasing exponentially anyway. It is not uncommon for students to have over \$100K in debt from undergrad and PT school. Are we getting dangerously close to a point in time when the well-qualified students no longer see PT as a career worth entering because they can pay less to make more in other careers? Are we already there, with many students choosing to go to PA school instead? (Ed Mahoney)
18. One question we were asked was how much money comes from endowments and quasi-endowments to our program/institution. Can you explain the difference and identify which is more common? (Stacy Fritz)
19. In your module you discuss *Carnegie Classifications* for universities stating that "Research" institutions have more prestige. Similarly, there is a movement in PT education to limit small liberal arts colleges from offering the DPT degree (due to lack of resources and poor scholarly productivity). Do you believe this argument has merit? (Howell Tapley)
20. Do you believe *tenure* still has a place in higher education, particularly in health care fields (eg, physical therapy) where there is constant need for qualified faculty? (Myles Quiben)
21. I was unable to find the written *philosophy of education* for my institution and just a general one for the department. What impact do you think that has on an institution's activities, strategic plan and student success? How can I address this with administration? (Diane Wrisley)
22. In Section 4 you imply that teaching methods will need to adapt to *changing demographics* – how and why? (Lynn Millar)
23. One of the topics that came up in this unit was diversification of the US population. I currently both live in and work at a PT program in Southern CA, an area that probably has more *diversity* and immigration than most. From your prospective, what do you think

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academic programs in these regions such as this must incorporate to not only prepare students for the profession and then board exam, but also to practice in these uniquely diverse areas? (Teresa Brown)

24. How can we prepare ourselves to deal with *cultural diversity* in our classes in the future? (Diane Wrisley)
25. As you are developing courses within a new *curriculum* (physical therapy) how do you find the balance between honoring academic freedom and being prescriptive in how a course is organized while you ensure that material is adequately covered in order to meet accreditation standards? (Tracy Brudvig)
26. How do we prepare ourselves for changing class delivery systems in light of our need to provide laboratory classes? (Diane Wrisley)
27. Specific to the "Top 10" list of future trends affecting physical therapy education, considering we teach hands-on skills and emphasize personal interaction, rapport-building communication, and all the nuances of active listening to mold excellent clinicians, I have concerns about the trend of "learning anytime, anyplace" and the shift to more online *instruction*. I'm curious if there have been assessments of programs that are moving to more/mostly online education - are they graduating "good" clinicians? (Stacie Fruth)
28. Do you think it is realistic that higher education, specifically in health care professions (PT, OT, PA, RN, etc.) would shift into more *practice-focused education* (pro-bono practice, clinical experiences) vs. heavy research agendas (focus on grants, publications, funding) to address societal health care needs? (Myles Quiben)

Healthcare Issues (ACA, Generalized vs Specialized Practice, Population Health, Partnerships)

29. As the *PPACA* becomes fully implemented and premiums are beginning to rise, there are becoming more plans that have a "high deductible plan." How do you see those who have been included in the primary care demonstrating their "value?" (Ivan Mulligan)
30. Is the soil fertile for physical therapy to get more involved in preventive and primary care roles with the *Affordable Care Act* in place? Does the ACA help us make a case for PTs to do this? And, what do people think about the possibility of the American Board of Physical Therapy Specialty (ABPTS) actually having a PT – primary care specialty? (Adrienne McAuley)
31. I am curious how you feel the upcoming presidential elections, where health care will certainly be a major discussion point, may or not influence how the current version of the *Affordable Care Act* and how it is currently being implemented? Do you foresee that there could be changes that could occur that could in turn influence higher education? (Teresa Brown)
32. There was a great deal of discussion regarding the specialization of PT's in the context of the greater problem with physician *specialization*. You implied that this was the wrong direction for physical therapy. I am in full accord in saying that physician specialization is key to the underrepresentation of primary care providers, but I don't see the two as equitable. Firstly, all PT Programs that I have been associated with are dedicated to graduating "generalists". So in that sense, all PT's, upon graduation at least, could ostensibly work in any field. Plus, in PT, once specialized, you are not bound to treating only patients in that specialization. I am

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an Orthopaedic Certified Specialist and treat geriatric patients almost exclusively. As well, even with specialization of, say orthopaedics, the PT is acting in the capacity of a gatekeeper for musculoskeletal problems, with the capacity (and obligation) to refer to other health care workers (other PTs, physicians) if their patients' need it. Therefore, it is adding to the primary care health care provider pool. Plus, there is no equivalent sliding pay scale for "Specialist" PTs as there is for MDs. Lastly, less than 10% of all practicing PTs are currently specialists, even though specialization has been around for over 30 year. I am wondering what I am missing in this argument that would compel me to worry that PT specialization is in any way comparable with the greater MD crisis in health care? (Burke Gurney)

33. We had a discussion during one of the forums about *generalized practitioners vs. specialized practitioners* in medicine and in physical therapy, based on the interview with Michael Rozier. Physical therapy programs have to meet the same CAPTE standards, and yet, have varied curricular plans including the length, number and timing of required clinical internships compared to OT. In addition there is a trend for residency programs and/or specialty certifications. From your prospective in OT, as PT programs plan to meet future healthcare needs, would it be beneficial for these programs to be more similar across the US including their clinical internship structure (and potentially give up some curricular freedom)? (Joy Karges)
34. How can we as a physical therapy profession, be 'part of the proposed solution' to our health care system, when in actuality we ARE following the medical model with '*specialization*' and pushing for niche markets and fee-for-service care? (Catherine Ortega)
35. What professionals do you see as essential partners with PT in the practice of *population* medicine? How can PTs best advocate for a role in population based medicine? (Melanie Heffington)

Module 3 – Dr Nancy Hall

Leadership vs Management Issues

36. The question about whether individuals can embody qualities of both a manager and a leader is intriguing. Is there any good advice for strong leaders who are "stuck" in a manager role, aside from taking advantage of every leadership opportunity available? (Stacie Fruth)
37. Our new chair is a very good manager, but I don't think he is a very good leader. What can I do, as another senior leader in his department, to "lead" him towards leadership? (Stacy Fritz)
38. What is most important to you when assembling a team? (ie, department, committee, or does this detail matter?) (Myles Quiben)
39. How can a leader promote collegiality among faculty? (Howell Tapley)
40. What is the most significant change that you have brought as the new leader to an organization? Being a new leader to an organization, would you suggest waiting to

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implement changes or effecting changes early on when you come on board? (Myles Quiben)

41. Can one still be an effective leader if they predominantly build on the visions of others rather than developing their own unique vision? (Lynn Millar)
42. The third practice of The Leadership Challenge is to challenge the process. If you are trying to encourage this practice in your faculty in their teaching and a point is reach where it appears that some innovative teaching approach they have decided to utilize will not be successful, how far do you let them go? (Tracy Brudvig)

Strategic Planning

43. When looking at the economic challenges of the University, what metrics may be beneficial for a department chair to examine to assist in strategic planning? For example, should revenue drive everything (assuming program mission and goals are being met) or should other metrics be examined (profit margin of the program, mix of students, percentage of aid student's receive, etc)? (Ivan Mulligan)

Negotiation

44. Under the twelve strategies in negotiation, I find the information very useful. I have to admit I haven't had the chance to further investigate this, but am struggling with number 6, "trade unequally valued items". Could you please explain to me what that means exactly? (Burke Gurney)
45. If the supervisor is not open to negotiation and facts, and information to the contrary do not influence the 'already made' decision, though not acknowledged to all, should one just accept the 'worst case scenario'? (Catherine Ortega)
46. Are the best conflict modes dependent on situations? Can a person change the level of assertiveness and cooperation they use dependent on the consequences of a situation? (Diane Wrisley)

Issues of Trust

47. In Covey's book he discusses the 5 Waves of Trust, with the 2nd being "Relationship Trust". In his book he states that although it is difficult to do so, trust can be repaired once it has been broken. What is the least risky method of restoring "Relationship Trust" with a colleague once it has been broken? (Melanie Heffington)
48. I enjoyed *The Speed of Trust* by Covey and I thought it had some great ideas for building trust. What can I do to restore trust between faculty members with a long history of disagreements between them? Does it make sense to keep them apart for the betterment of the team attitude or try to force them to collaborate? (Ed Mahoney)
49. It is clear that accountability and credibility go hand-in-hand and are instrumental to successful leadership. We typically think of this as leaders being accountable to their team and earning credibility, but what do people think about leaders losing credibility by not following through with holding *others* accountable? *More pointedly, how do leaders hold faculty accountable; how do faculty hold one another accountable?* (Adrienne McAuley)



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50. I have seen both sides of the trust aspect at work (Low Trust to Trust is a Visible Asset from Covey). We had a stable faculty for several years, then had some turnover, and two of the faculty departures were difficult. While our current faculty is on the positive side of trust again within our department, due to the small nature of the PT world, I still interact regularly with the faculty who had challenging departures. I would like to potentially collaborate with these individuals and other colleagues of theirs, but my administrators feel differently. What advice do you have to help encourage trust in former colleagues when my administrators don't appear interested in trusting again? (Joy Karges)

**2nd Onsite Session for
2015-2016 Education Leadership Institute
Phoenix, AZ**

March 10, 2016
12–2 pm ET, 11 am–1 pm CT, 10 am–12 pm MT (PHOENIX), 9–11 am PT

**Questions for ELI Modules 4, 5, and 6
Polly Moss, Steve Milam, and James Kemper**

Enrollment, Admissions, Enrollment Strategies, Support Services

- 1) Polly - In what ways, if any, do you feel changes in external accreditation standards influence the enrollment strategies of programs or institutions? (Brown, Teresa)
- 2) Polly - In our forums we discussed admissions procedures. I know of programs who are starting to informally screen or supplement the required GPA/GRE/etc information from the application (ie tools to screen for things like critical reasoning, executive functioning, resilience). What are your experiences with schools using such tools in the decision to offer a student acceptance into the program rather than waiting until post-admission? (Karges, Joy)
- 3) Polly - Do you think a written admissions mission and philosophy for a program is strategic if the university does not have one? We have written one, given some of the readings, but are concerned about integration with the university admissions. (Millar, Lynn)
- 4) Polly - In reviewing material related to strategic enrollment, I understand that every university is different when examining enrollment management based on their mission. Once a student expresses interest and the discussion moves to looking to accept a student into a program, there are concrete areas that are identified for review (QPA, SAT/ GRE scores, etc). Additionally, there may be other factors that are examined that are not as concrete (School attend prior to enrolling, use of an interview, etc). When attempting to merge these two areas are there any general trends that have emerged? (Mulligan, Ivan)
- 5) Polly - How do programs balance university mandates to increase enrollments with the need to maintain quality in education? Example: University administration pressures a program to increase total class size, yet program faculty do not believe they have the staff or resources to do so without negatively affecting the quality of education delivered. (Tapley, Howell)
- 6) Jim - While the university has been trying to improve support services for undergraduate students, our students are often left out. What are some good tactics for getting the university to address the needs of a smaller group of individuals? (Millar, Lynn)

Diversity

- 7) Polly - Part of my Institute's strategic plan is to increase diversity in the student population. One way they target this is through scholarships. Each program is allocated money to distribute among candidates they identify. Our program uses this money to try to increase diversity within a class. However, students self select themselves as an under-represented minority with no verification. This information is what is used to determine the distribution of scholarship money in the hopes of increasing diversity.

Socio-economic status nor other factors are used to identify someone as under-represented. Is this a usual practice? (Brudvig, Tracy)

- 8) Polly - Many of our programs want us to increase diversity in the a) applicant pool and b) accepted applicants. Any suggestions on how to do this for former (a) and if we follow our enrollment policy's and procedures for later (b) this often is self-limiting. Any suggestions? (Fritz, Stacy)
- 9) Polly - We typically struggle to get well-qualified minority applicants for our program. Often times, the minority candidates we do get are given preference in the admissions process as we would like to increase our diversity in the class to more appropriately match the patient population. However, we have found that the lower scoring candidates on GRE/GPA are more likely to either fail out or fail the licensing exam – both of which look bad from a CAPTE standpoint. How do we best balance these apparently conflicting goals? (Mahoney, Edward)
- 10) Polly - APTE encourages diversity in a cohort yet admissions committees are bound by non-discrimination laws. How can a university increase the diversity in a class while not discriminating? Especially given that in general minorities perform less well on standardized tests. (Wrisley, Diane)

Disabilities and Essential Functions

- 11) Polly - Specific to the requirement to provide "reasonable accommodations" to a student with a documented disability, at what point can "reasonable" pull in what is typically expected in professional (clinical) practice? Brief example: A student is granted "double time" accommodations for all testing (written or practical) and on-the-spot assignments for a disability that involves slow processing and problem solving. This student consistently uses all of this extra time, generally receives acceptable scores, but the faculty know that this pace of processing will not be acceptable in a clinical setting. Accommodations can be made for the licensure exam, but likely not on clinical rotations. I'm certain we're not the only program that's dealt with this, but I haven't heard this discussed (or I've missed it!). (Fruth, Stacie)
- 12) Polly - Regarding essential functions, can a program require proof of ability to perform in the event a student discloses a disability and does not self reflect in a manner to self limit their participation in a program of study? For example, a student has a TBI and PTSD, signs the essential functions, yet clearly is incapable of meeting the "emotional stability required for an unpredictable and changing work environment". (Heffington, Melanie)
- 13) Polly - What is the recommended time frame for regularly reviewing essential functions/technical standards? (Karges, Joy)
- 14) Polly - With regard to ADA and reasonable accommodations, I understand that there are no specific means written to determine how this is implemented, however, is there anywhere a requirement that a university is required to set up a specific location/ testing center that would accommodate students that need a quiet location and extra time etc? (Ortega, Catherine)
- 15) Steve - How best shall a program inform a clinical rotation of a student's disability and request for accommodations for said disability? (Heffington, Melanie)
- 16) Steve - Our program is an early assurance program meaning students who are accepted into our program as freshman they may matriculate into the professional program as long as they maintain the progression standards set for the program. Given this

acceptance are they bound to the essential functions as in the professional phase of the program in the first three years? For example, can a student be dismissed if they fail to follow an item related to professionalism? (Mulligan, Ivan)

Student Progression, Evaluation, Dismissal

- 17) Polly - If a student is dismissed from the program and decide to appeal, does the program have to keep them enrolled in the program until their appeal process is complete, or is the program allowed to immediately suspend classes for the student? (Gurney, Burke)
- 18) Polly - I was recently invited to sit on the Student Develop Committee for another program within our College of Health Professions. The College mandates that at least 3 faculty sit on any SDC. In addition to the 3 faculty, this group also has one of the admissions staff and one of the library staff. It seemed unconventional to me and I wonder what your views are on having staff involved in decisions regarding student progression. (McAuley, Adrienne)
- 19) Polly - With the rise of a consumer-oriented view of higher education that envisions grades, powerpoint presentations, notes as an entitlement for one who has paid tuition, what are your best suggestions/advice on how we can (continue) to foster to critical thinking and self-directed behaviors in graduate, doctorate-level students? (Quiben, Myles)
- 20) Steve - Consider the following 2 cases: A physical therapist assistant student fails the licensure exam and requests a refund of her tuition. Does she have a case for negligence? What if a program with candidacy does not get accreditation? Could the school be sued for negligence? (Wrisley, Diane)

Criminal Background Checks

- 21) Polly - A background check is not asked for as part of our admissions process, but we are implementing the requirement that a background check be done prior to the student matriculating, effective this Fall 2016. It is best to make sure that applicants know this before applying, of course, but also to have formal notification prior to giving a deposit. Is this information appropriate to include in the acceptance letter? (McAuley, Adrienne)

FERPA.

- 22) Polly - Increased parental involvement is being seen in grad school, ranging from parents talking to faculty during the interview process to inquiries re: student grades Taking FERPA, into consideration, what are your thoughts on inclusion and/ or addressing parents of grad students in marketing and/or part of (Quiben, Myles)
- 23) Steve - In the category of grievance and/or FERPA, specific to the case against Jane who posted things about a group of students on her Facebook page, does this imply that NO comments should be made on social media about a class or group of students, even if positive. Part of my attempt to engage students outside of class is via social media (NOT via any of my personal accounts, only professional). I often praise a group that did something well (maybe participated in a service activity) or congratulate them when something is behind them (such as a big exam week). Is this practice discouraged as well on legal grounds? (Fruth, Stacie)

Academic Freedom, Course Ownership

- 24) A faculty member develops and teaches a course with a University and then after a few years, leaves on poor terms. A new faculty member is assigned the course. What, if any, of the previously developed materials can the new faculty member utilize? (Brown, Teresa)
- 25) Do you think intense accreditation criteria neglect the importance of academic freedom, either from an institutional perspective (ie institutional autonomy) or as an individual? (Fritz, Stacy)
- 26) Academic freedom – I seem to be hearing different things from different people, but remember hearing that ultimately, the institution has final say in these things, for instance, if an instructor fails a student and the result is the student being removed from the program, the administration could override that decision. Is there a general rule as to what is and is not in the purview of the institution regarding academic freedom? (Gurney, Burke)

Religious Freedom

- 27) Steve - After students have been accepted into our program, they have to supply us with all of their required immunization records. What is the best approach to handle a situation where a student is refusing certain immunizations for “religious reasons” and supplies documentation from a religious leader regarding the situation? The student would be required to complete an inpatient rotation as part of our curriculum, and immunizations (or proof of immunity) are required by clinical facilities, in addition to being required by our program. My biggest worry was that even if the school made exceptions for the immunizations, the student would not be able to successfully complete our program because the clinical sites would not make those exceptions. (Karges, Joy)
- 28) Steve - Working at a state school in the Bible Belt often raises some interesting religious freedom issues. As an extreme example of how crazy things get, we have a holiday party rather than a Christmas party to be more inclusive, but someone says a prayer and blesses the food. Along those lines, it is common for people to want to have a group prayer prior to big decisions. Is this allowed, and even if it is deemed legal, should it be discouraged as the people opposed to it are unlikely to speak up? (Mahoney, Edward)

29) Risk Management

- 30) In reviewing the case you presented in Risk Management with Laura the CI and Mary the student and Christi the patient, is there also potentially the issue of potential lack of more direct supervision on the part of the CI? You would only have Mary’s word that she administered the treatment correctly. What would prove if she administered the treatment correctly? (Brudvig, Tracy)
- 31) Being in administrative position increases one’s ability to influence several functions such as hiring and student admissions; at the same time, you are also more vulnerable to potential litigation. What are the top 3 things can you best advice chairs/directors to mitigate the risks? (Quiben, Myles)

Administration

- 32) Steve - Regarding the “essential freedoms” of the institution – who comprises the institution in this context? Is it the higher administration? The Board of Trustees? It appears to me that the professional programs have the benefit of our external accreditors (CAPTE for the PT programs) helping to set standards and expectations.

For other programs, however, if there is conflict about curricular context, what responsibilities and what privileges do the faculty have compared to the “institution”?
(McAuley, Adrienne)

- 33) Steve - In trying to complete some of the assignments, I was constantly frustrated with the lack of responsiveness to my requests. Even the vice provost commented on how she could not get timely responses from some departments. Do you have any suggestions for ways to help move to a service mentality for administrative departments? (Millar, Lynn)
- 34) Steve - The university legal counsel is reluctant to sign off on clinical education contracts with hospitals and clinics due to disagreements language reflecting liability/risks. The faculty view university counsel as being unrealistic and overly protective of the university. For example, She has argued about trivial matters like who is responsible if a student does not wear his/her name tag! This has slowed the rate of acquiring new contracts and has cost the program valuable agreements with large therapy companies. How do we approach this professional who is sometimes arrogant, unyielding and defensive? (Tapley, Howell)
- 35) Jim/Polly - It is my understanding that we are legally bound to maintain student records for 7-years after their graduation date. What is not clear to me is exactly what constitutes “records”. Is that only student grades? Each student’s test, or simply a copy of the test and the students’ grades? Assignments and written work? (McAuley, Adrienne)
- 36) Jim- What strategies do you believe are most effective in resolving conflicts between employees, especially those that have become intense and chronic? How can we promote harmony among faculty and staff who work in a closed environment where avoidance is not an option? Can you provide an example from your past? (Tapley, Howell)

Social Media

- 37) Steve - We continue to struggle with the video of faculty and students in the classroom setting by other students. A school on our campus implemented a social media policy, but when we looked at it in our school and department, it looked like an infringement of freedom of speech. The general guidelines that we have are that any video or photos can only be taken with the specific permission of the students and faculty and none of patients should be taken or posted. Is it a good idea to have more of a policy than what I have just described? Should and can there be more ‘control’ of student social media postings of class and clinical activities that are legally defensibly? Short version, could you comment a bit more about the management of postings on social media by students that can 1) spread information about class/ lab activities, 2) be personally damaging to faculty/administration—if students post negative/damaging opinions? (Ortega, Catherine)

Role of HR / Institutional Governance

- 38) Jim - Do you feel the role of HR differs (or should differ) between academic institutions and traditional businesses? (Brown, Teresa)
- 39) Jim - Recently, our Institute reorganized the Office of Student Affairs into the Office of Student and Alumni Affairs and Office of Enrollment Services. There has been some resistance to this reorganization partially because of a lack of transparency. In your opinion, do you think there is a critical mass as far as the size of an Institution where this type of reorganization is a must? (Brudvig, Tracy)

- 40) Jim - I feel we are moving more and more away from shared governance, that we give it face time with multiple committees, but we tend to have a top down approach (ie committees suggestions are ignored or overturned). As Universities become more business-like, where decisions are often made based on budget (sometimes at the cost of "the good of the student") how do we continue to maintain a true shared governance approach? (Fritz, Stacy)
- 41) Jim - It continues interesting to me that with regard to faculty, the legal and HR dept at our institution mentions that evaluation, promotion and contract renewals are not the purview of HR and that this is more relevant for staff. Therefore, with regard to these issues (outside of benefits) as they relate to faculty, the office of the VP for faculty is the source of information. Could you comment upon the integration of HR as source of information for faculty development plans for potential termination versus the VP for faculty. (Ortega, Catherine)

Hiring

- 42) Jim - In the age discrimination act, it only applies to those under 66? So it is OK to not hire a person who is 66 based solely on their age? (Gurney, Burke)
- 43) Steve - Can you please describe situations where an external candidate for employment would have an advantage over an internal candidate for employment? (Heffington, Melanie)

Faculty Work Load

- 44) Jim - My faculty spans from Baby Boomers to Millennials with about a 40 year spread in age. Due to retirements and vacancies we have added 4 faculty in the last 3 years, and have one more retirement this summer. There is a difference in perspective on "reasonable work load" depending on the given faculty member (somewhat similar based on age), and we feel at times our productivity expectations seem to be expanding. Pair that with students who seem to have more challenges, and what appears to be "standard workload" becomes "way more than expected workload." What advice do you have from an HR perspective to keep the faculty on a positive path? (Karges, Joy)
- 45) Jim- If there is no stipulation in the faculty/staff handbook about requirements for onsite presence of a faculty member through a typical week, can a faculty member be forced to work on campus versus working from home, assuming "work" gets done? (Fruth, Stacie)
- 46) Jim- I have a faculty member that needs to retire, but does not want to. Aside from "tread carefully," do you have any advice as to how I legally proceed with this without it becoming an age-discrimination issue? (Mahoney, Edward)

Pay and Benefits

- 47) There is a lot of talk about "incentivizing" wellness programs where individuals receive a bonus for completion of a program, however these programs have varying degree of success. I recently read an article indicating that if you negatively incentivize (penalize for not participating) it has been shown to be more effective. What is your opinion on "penalizing" vs "rewarding" an activity? (Mulligan, Ivan)
- 48) At a time where limited budgets and funding in higher education have constrained faculty activities (e.g. travel) and compensation (raises, bonuses, sign-on), what is the primary advice you have (for chairpersons) on how to best to utilize human resources to advocate for faculty? (Quiben, Myles)

49) What are some ways of ensuring equal pay among faculty when it is difficult to recruit faculty and new faculty may require higher compensation in order to accept a position.
(Wrisley, Diane)

ELI Fellowship 3rd Onsite Session
Faculty Webinar Questions for Modules 7, 8, and 9

Wednesday, July 13, 2016

1-3 pm ET, 12-2 pm CT, 11 am-1 pm MT, 10-11 am PT

<http://apta.adobeconnect.com/r55344288/>

1-888-407-5039, Participant Code: 42610998#

MODULE 7: Dr Melanie Gehen

1. **Fundraising:** In fundraising with alumni, is there a formula for determining a suggested gift amount? (Heffington, Melanie)
2. **Fundraising:** Considering the debt load of students at graduation, what suggestions or tips do you have for promoting "buy in" that will encourage giving back to the program post-graduation? (Karges, Joy)
3. **Fundraising:** While reviewing some of our fundraisers, it seems we do some more out of tradition than because they are effective. In regards to the "cost to raise a dollar" discussion on fundraising, is there any recommendation for an appropriate cost to raise a dollar when we are only talking about raising hundreds to thousands of dollars? In other words, it makes sense that only making a 1 cent profit per dollar may be worth it if we are talking about millions, but is less useful for small projects when faculty time could be better spent doing other tasks. (Mahoney, Edward)
4. **Fundraising:** How can I better align programmatic and university endowment goals and activities? (Millar, Lynn)
5. **Future of Higher Education Finance:** This is a broad question that likely has no concrete answer...It seems that the finance/budgetary trends in higher ed are not favorable to sustain the status quo (less federal/state aid, less grant funding, more and more student aid/debt, higher executive salaries, etc). Broadly, is higher ed close to crisis status in terms of simply paying the bills to keep the lights on? Or, is this part of the typical ebb and flow of long-term financial trends in higher ed? (Fruth, Stacie)
6. **Future of Higher Education Finance:** This was a helpful module and provided excellent resources for understanding the language of finance. I am left with the idea of 'so who pays?'. Could you comment on your perspective of where we are headed—will we continue to have business leaders take over education and continue to place the burden of paying on students so that we will have a more lopsided society in the USA? (Ortega, Catherine)
7. **Future of Higher Education Finance:** It seems in recent years state governments have gradually cut funding of public universities. Has this trend leveled off and what does the future hold? Will tuition and other sources of funding continue to make up more and more of university revenue? (Tapley, Howell)
8. **Institution/Program Budgeting:** (1) What are some recommendations you might have for a program transitioning from one type of budget system to another? Specifically in moving from program centered budgeting to a zero-based budgeting system. (2) The module discussed some of the increased requirements of for-profit colleges financially as compared to not-for-profit school. After some of the high profile for-profit closings (such as Corinthian) in the past few years, do you anticipate these requirements to increase even further? (Brown, Teresa)

ELI Fellowship 3rd Onsite Session
Faculty Webinar Questions for Modules 7, 8, and 9

9. **Institution/Program Budgeting:** Our public, state University (R1) is only supported 10.8% by state appropriations, is this common? (Tuition and fees - 47%, Sales/Auxiliary - 14%, Grants/Contract/Gifts - 26%, Other - 2%)? (Fritz, Stacy)
10. **Institution/Program Budgeting:** Under cash flow, you stated that when assets increase, cash declines, and when liabilities increase, cash increases. Could you elaborate on that and give examples. (Gurney, Burke)
11. **Institution/Program Budgeting:** My universities Composite Financial Index Score was 3.0 for many years yet recently dropped. The chief financial officer for the university indicated that it was due to the university paying off some debts or paying for projects instead of borrowing the funds for them. Can you discuss why this would be? (Wrisley, Diane)
12. **Institution/Program Sustainability:** In situations when departmental/school budgets in are primarily controlled by the administration with little to no transparency and inevitable cuts in federal funding are the reality, what are your top two (2) recommendations on how we can advocate for individual and department funding? How can we faculty best respond to cuts in financial resources? (Quiben, Myles)
13. **Non-tuition Revenue:** When setting up CME as a revenue stream, do institutions generally take a percentage of the revenue for defined overhead costs and another portion to go to things like a general fund? (Brudvig, Tracy)
14. **Non-tuition revenue:** What additional factors should be considered when looking at conferences or certificate programs. Is there a certain profit margin that should be expected? (Mulligan, Ivan)
15. **Student Financing:** APTA documents show that the median income for new grads (PTs with 0-3 years' experience) was \$64,000 in 2013. Aggregate loan limits for undergrad & grad student loans are \$138,500. Given the expected income, though, this seems extremely excessive - is there a formula or recommendation that you would give to a student about imposing a limit on one's own student debt? (McAuley, Adrienne)

Module 8: Dr Robert Mundhenk

16. **Curriculum Mapping and Rubrics:** This is a segue from a forum discussion.... I use rubrics frequently in my DPT courses, as do many of my faculty. But I think there can become an over-reliance or over-emphasis on their use specific to student expectations that they be told exactly what to do (whether on a paper, project, or performance). In a profession that requires on-the-spot thinking, creative problem-solving, and the ability to change a course of action based on multiple pieces of information, I think there's value in (sometimes) being vague about expectations to see what student is capable of internally/independently generating. I'm curious about your thoughts on that (not a specific question). (Fruth, Stacie)
17. **Curriculum Mapping and Rubrics:** I liked the discussion about using master rubrics across the curriculum to transition to an outcomes-based approach. In your experience is it beneficial to have co-course instructors that can help to ensure that the course remains focused on the outcomes as opposed to particular topics that one professor might be stuck on? (Mahoney, Edward)

ELI Fellowship 3rd Onsite Session
Faculty Webinar Questions for Modules 7, 8, and 9

18. **Graduate and Employer Surveys:** Both in the module and in discussions with colleagues, it has been expressed that graduate and employer surveys are unreliable assessments for many reasons. Can you suggest other methods to obtain this information? (Wrisley, Diane)
19. **Learner-centered Teaching:** While I agree that descriptive or developmental rubrics certainly lend to successful outcomes based assessments, I find at times the number of students we deal with (70) very challenging. Do you have any words of wisdom or advice as to how to manage large numbers of students and ensure students are receiving the level of feedback to truly facilitate their learning? (Brudvig, Tracy)
20. **Learner-centered Teaching:** A great deal of student centered learning is predicated on students doing their work ahead of time, but the reality is often that they are so busy putting out fires in other classes, that they don't do the work, and what ends up happening is the same students participate in the activities in class, while others slip under the radar. How can one deal with that situation? (Gurney, Burke)
21. **Program Assessment and Outcomes:** (1) What have you found to be some of the most effective strategies in getting faculty to objectively re-assess their assessment practices? (Particularly older faculty who have been doing things "their way" for many years? (2) We discussed closing the loop in terms of programmatic assessment, what are some strategies to assist faculty in incorporating this feedback into their current teaching practices? (Brown, Teresa)
22. **Program Assessment and Outcomes:** How would you recommend changing a curriculum from a traditional model to an outcomes based model? (Millar, Lynn)
23. **Program Assessment and Outcomes:** In examining program outcomes, how much data (how many cohorts/ years) should be used to determine if a change is warranted? (Mulligan, Ivan)
24. **Program Assessment and Outcomes:** Though I understand the push towards outcomes (and have my degree in this area), I am concerned about the lack of emphasis on process. Though there are many ways to accomplish the end result and it seems is why process is not as emphasized, are we not losing many investigative opportunities because there is less emphasis on process? (Ortega, Catherine)
25. **Program Assessment and Outcomes:** It was mentioned that efficiency data tend to be prized more than effectiveness data in many higher institutions. Can you speak more on strategies on how to utilize effectiveness data more and getting buy-in on its use vs. the traditional efficiency data? (Quiben, Myles)
26. **Program Assessment and Outcomes:** Academia is data driven and obsessed with outcomes. Is there a point when assessment becomes overbearing and counterproductive? Are we wasting valuable time "assessing" when we should be focusing more on "doing"? (Tapley, Howell)
27. **Student Assessment:** I often feel the data we collect on our students' performance and the effectiveness of the program are reflective of a reporting orientation from higher administration. It's more of "have you done it" versus "how are you using it". Any suggestions on how to move from the former to the later? (Fritz, Stacy)
28. **Student Assessment:** We are moving toward having 3 case-based comprehensive / cumulative exams in our Program - the first two occurring before the 1st and 2nd clinical experiences respectively, and the last right before graduation - as one mechanism of improving direct measures of student performance and ensuring readiness for clinical

ELI Fellowship 3rd Onsite Session
Faculty Webinar Questions for Modules 7, 8, and 9

experiences. Do you have recommendations regarding the development of these exams? (Our initial plan is to have an item-writing workshop similar to what the FSBPT does, and to have one cohort of students who will take the exams as a pilot so we can have item-analysis data.) (McAuley, Adrienne)

29. **Student Assessments:** In what ways could collaborative learning experiences be measured? For example, a physical therapist assistant student and a respiratory therapist student are working together in a patient simulation scenario. How do you capture the valuable learning from the exchange of the two disciplines? (Heffington, Melanie)
30. **Student Assessments:** We use both direct and indirect measures in our program assessment. One direct measure is the CPI (Clinical Performance Instrument) which is the tool used to assess student performance during clinical internships. Clinical instructors go through formal APTA training to use this instrument, yet I see some inconsistencies especially in advanced practice settings. What suggestions do you have to improve consistency with a "standardized" instrument? (Karges, Joy)

Module 9: Dr Deborah Waddill

31. **Building Relationships:** (1) What do you suggest as some of the most effective strategies for developing relationships with key parties/ individuals/ departments of the university when you and your department are located on a satellite campus and have very little face time? (2) We discussed that one of the trends concerning higher education in the future is the that the "shortage of all faculty will become critical, especially in physical therapy and other health professions", what recommendations do you have to rectify this situation and entice a younger generation into academia? (Brown, Teresa)
32. **Building Relationships:** This is a question about a situation I'll find myself in soon, thus somewhat personal but I hope any insight can be useful to others. I am someone who is very strong in the political frame who also strongly values (and goes after) creating broad relationships with many varied entities. In my experience, both of these characteristics can be seen as somewhat threatening (I can elaborate if needed). So, heading into a new position in a new setting, knowing I will rely on these characteristics, what advice do you have to reduce the appearance of threat? (Fruth, Stacie)
33. **Building Relationships:** How do you recommend identifying external stakeholders from the community? (Millar, Lynn)
34. **Emotional Intelligence:** Do you think a person's level of Emotional Intelligence can be appropriately evaluated? If yes, would you use this in student application process, student advancement, or faculty hiring? (Fritz, Stacy)
35. **Emotional Intelligence:** I very much agree with the idea that although IQ shows what someone is capable of, emotional intelligence is a better predictor of success in a job or on a team. Other than the Mind in the Eyes test, which was discussed in the TED talk, are there any other emotional competence tests that may be useful in recruiting faculty and also during admissions? Also, are there any concerns you have with using these tools? (Mahoney, Edward)
36. **Emotional Intelligence:** You discuss emotional intelligence as an important characteristic for leaders. I believe it is also important for all members of the team. How

ELI Fellowship 3rd Onsite Session
Faculty Webinar Questions for Modules 7, 8, and 9

does one deal with others who are not competent in emotional intelligence? (Wrisley, Diane)


37. **Situational Leadership:** Under the heading of “enhancing visibility”, can you give some examples that you have seen that have been useful, create an awareness without seeming to be “tooting your own horn”? (Gurney, Burke)
38. **Situational Leadership:** Coming from health care where teamwork is very much expected and valued for the common purpose of serving a patient, I have found academic teamwork challenging. As you point out, in academia there are so many cross purposes and individual agendas. Moving any rock forward can often be at best slow, and at worst, insanely frustrating. When a rock isn’t moving because of individual agendas or cross purposes, is that a time to just not move the rock? Would leading from the middle in these scenarios involve leaving the rock alone? (Heffington, Melanie)
39. **Situational Leadership:** In Section 4 you provided information about developing good questions. I feel that as a reflective learner, it takes me a lot of time to come up with a good question. Thus, I can miss out on asking the question before the discussion has moved in a different direction. What advice do you have for quicker processing in my question development? (Karges, Joy)
40. **Situational Leadership:** I really enjoyed reading about Situational Leadership. Bocchino indicated that he uses low directive "delegate" and "support" styles with faculty. Do you think these styles can also be effective with administrative staff? (McAuley, Adrienne)
41. **Situational Leadership:** I found the book and information about Leading with Questions a helpful reminder. It resonated with me that when asking questions, it makes people stop and consider. Though I always do this with students when teaching, I tend to make statements when trying to ask questions as a leader. Though I find asking questions stimulates discussion, it is difficult to ask a question in a positive way, rather than stating it as a solution to a problem. (1) Can you provide words of advice that you have found in ‘asking the question in the right way’? (2) I liked the idea of ‘leading from the middle’. I think often this is seen as ‘not having vision’. Can you comment on this observation that can be made with this leadership style? (Ortega, Catherine)
42. **Situational Leadership:** In a heavy top-down hierarchical management structure, what would your top recommendation be on how to be a change agent and advocate for you/ department and still mitigate the potential target on your back? (Quiben, Myles)
43. **Situational Leadership:** How do people survive long-term by being in the “middle”. Does it not eventually tear you apart? Is it best to eventually move back to a normal faculty position or move up to higher administration? (Tapley, Howell)
44. **Social Media:** What social networking platforms have you found to be effective for relationship building? Why have these platforms been found to be effective? (Mulligan, Ivan)
45. **Technology:** With all the technologies we have available today, I think the personal has been taken out of a lot of communication and can have a detrimental effect. What do you think is the appropriate mix of "personal" and technology use to get the best outcomes? (Brudvig, Tracy)

Announcement to 2015-2016 ELI Fellows-in-Training About Graduation and Guests

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Apr 18
2016



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Hotel Reservation Link for 3rd ELI Onsite Session

Actions ▾

Elisabeth J. Ross, MA
 Hotel Reservation Link for 3rd ELI Onsite Session
 April 18, 2016 03:40 PM

Dear ELI Fellows-in-Training,

Attached is travel information for the 3rd ELI onsite session and graduation at the Pan Pacific Hotel in Seattle.

HOTEL RESERVATIONS: Please go to <https://www.panpacific.com/american-physical-therapy-association> and make your hotel reservations by June 17. The group room rate is \$269.

- Arrival: No later than July 12
- ELI Dates: July 13 beginning at 7:30 am through July 14 ending at 9:30 pm
- Check Out : No earlier than July 15

GUESTS AT GRADUATION: You are invited to bring one or more guests to the commencement, so they may join you in celebrating your outstanding achievements in ELI. Graduation events will tentatively begin at 6:00 pm PST on July 14. There is a \$100 fee for guests to attend the reception, banquet, and ceremony. The fee covers 2 drink tickets during the reception and a banquet meal with wine service. APTA will only accept payments by check as paid to Libby Ross onsite in Seattle. Unfortunately, there are no pre-pay or credit card payment options available. If you plan to bring guests, please email the name(s) to me by June 1.

GRADUATION SPEAKER: APTA is pleased to announced that Dr. Pamela W. Duncan, professor in the department of neurology and senior policy advisor for innovations and transitional outcomes at Wake Forest Baptist Medical Center, will serve as the 2016 ELI commencement speaker. View her [biography](#).

More information about will be shared in the weeks ahead. Please send any questions you have in the meantime. Thank you!

Libby J. Ross, MA
 APTA Director of Academic Services
 703/706-3326 or 800/999-2782, ext. 3326
libbyross@apta.org

Attachments

- [PanPacificHotelandTravel.docx](#) (20k) - April 18, 2016 03:40 PM


Edited By:
 Elisabeth J. Ross, MA[APTA Staff] @ Apr 18, 2016 - 03:50 PM (America/Eastern)

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2015-2016 Updates

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American Physical Therapy Association

APPENDIX BB

Education Leadership Institute

ELI Reaccreditation
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Education Leadership Institute (ELI) Fellowship

APTA's Education Leadership Institute (ELI) Fellowship is a shared collaborative between the American Council of Academic Physical Therapy (ACAPT), Education Section, Physical Therapist Assistant Educators Special Interest Group, and APTA. Participation in this program is by application and selection only.



ELI Fellowship Now Accepting Applications for 2016

ELI is accepting applications for 2016. The submission deadline has been extended to March 1, 2016, at 5:00 pm, ET. This yearlong, invitational, blended learning (online and onsite components) fellowship program includes experienced mentorship, and is designed to develop emerging and novice (0-7 years) physical therapist and physical therapist assistant education academic program and residency and fellowship directors with leadership skills to facilitate change, think strategically, and engage in public discourse to advance the physical therapy profession.

Applicants are selected based on the strength of their application and meeting all eligibility criteria. Scroll down to learn more about the program.



General Resources

[Overview](#)

[Curriculum](#)

[Mentors](#)

Getting Started - Apply by March 1, 2016

[Application](#)

[Costs and Time Commitment](#)

[Why Should I Consider an ELI Fellowship?](#)

ELI Fellowship Graduates

[2015 Graduates](#)

[2014 Graduates](#)

[2013 Graduates](#)

[2012 Graduates](#)

From: acapt
To: [ACAPT Reps \(acapt_reps@apta.org\)](mailto:ACAPT_Reps(acapt_reps@apta.org))
Subject: BOTW: Education Leadership Institute Fellowship Now Accepting Applications for 2016
Date: Thursday, December 17, 2015 11:24:49 AM
Attachments: [image001.jpg](#)

Education Leadership Institute Fellowship Now Accepting

Applications for 2016: APTA's American Board of Physical Therapy Residency and Fellowship Education's accredited [Education Leadership Institute \(ELI\) Fellowship](#), a collaborative with the American Council of Academic Physical Therapy, Education Section, Physical Therapist Assistant Educators Special Interest Group, and APTA, now is [accepting applications](#) for 2016. Submission deadline is **January 15, 2016, 5:00 pm ET**. This yearlong, invitational, blended learning (online and onsite components) fellowship program includes experienced mentorship, and is designed to develop emerging and novice (0-7 years) physical therapist and physical therapist assistant education academic program and residency and fellowship directors with leadership skills to facilitate change, think strategically, and engage in public discourse to advance the physical therapy profession.

Applicants are selected based on the strength of their application and meeting all eligibility criteria. To learn more about the Education Leadership Institute Fellowship, go to the [ELI webpage](#).

Sandy Rossi
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From: [acapt](#)
 To: [ACAPT_Reps \(acapt_reps@apta.org\)](mailto:ACAPT_Reps(acapt_reps@apta.org))
 Subject: BOTW: Expanding opportunities for leadership development
 Date: Thursday, January 21, 2016 12:09:22 PM
 Attachments: [image001.jpg](#)

ELI Application Deadline Extended to March 1: Good news! APTA has extended the application deadline for the 2016-17 Educational Leadership Institute (ELI) Fellowship to March 1. ELI is a yearlong, ABPTRFE-accredited fellowship program designed to develop innovative and influential leaders in physical therapy education. Novice (0-7 years) and emerging leaders in PT and PTA education programs, as well as directors of residency and fellowship programs affiliated with an academic institution, are invited to apply. To learn more about ELI, visit <http://www.apta.org/ELI/> or contact libbyross@apta.org. If attending CSM, also visit the ELI table at the Career Development Reception in the Platinum Ballroom 6 at the Anaheim Marriott on Friday, February 19, from 8:00 to 10:00 pm. Please share this announcement with prospective candidates.

ACAPT Members Are Invited: All members of our [member institutions](#) are invited to a [roundtable liaison meeting at CSM](#) to discuss your experiences within your region and/or institution. Members of ACAPT are not just the representatives of the member institutions. They are also the program chairs, faculty, directors, etc. Help us identify opportunities for improving excellence in physical therapy education! Join us for hors d'oeuvres and a cash bar at CSM on [Wednesday, February 17 from 4:00-7:00pm](#). Not sure who your liaison is? Take a look at our [Regional Liaison List](#) for more information and to take advantage of discussions and opportunities whether at CSM or otherwise.

Reach100 Begins: January 15 marked the launch of APTA's annual **REACH100 Student Membership Challenge**. Spearheaded by the Student Assembly, Reach100 is a nationwide effort that promotes association membership and participation among PT and PTA students. Reach100 honors PT and PTA programs with 100%, 90%, 80% membership and now also honors programs that have 50%-79% membership among students. Qualified institutions gain recognition while students have the opportunity to win great prizes. To participate, an entry form with a student membership roster must be submitted no later than April 30. This is a great way to encourage students, including future leaders and potential long time members, to join APTA and win great prizes. To learn more about the challenge, visit the [Reach100 webpage](#), visit the Student Assembly [Facebook page](#), or send an email to Reach100@apta.org.

CoHSTAR's Summer Institute on Health Services Research The institute will occur on June 28-29, 2016. This is our first Summer Institute and we are very eager to reach our target of 80 attendees! Registration for the Summer Institute is now open. Please forward the below email announcement to colleagues who may be interested in attending.

Remembering Sharon Shaw: Sharon Shaw, PT, DrPH, chair of the UAB Department of Physical Therapy from 1998 until retiring in 2013, passed away on January 11, 2016.

2015 ELI Fellows Graduate From APTA Education Leadership Institute

A fourth cohort of physical therapists graduated from the ABPTRFE-accredited APTA Education Leadership Institute (ELI) on July 29, 2015, completing a yearlong higher education program to become ELI Fellows. The program consisted of:

- 9 online modules provided by content expert faculty;
- 3 2-day face-to-face mentorship sessions and ongoing mentorship provided by experienced physical therapy program directors;
- higher-education mentorship provided by physical therapy education leaders; and
- implementation of a personal leadership plan and an institution-based leadership project.

In addition, the 16 new ELI Fellows cultivated a shared learning community and network with opportunities to integrate curriculum content within their education leadership responsibilities.

The ELI Fellowship strives to develop physical therapist and physical therapist assistant education program directors with the leadership skills to facilitate change and improvement in the academic environment of the 21st century, think strategically to implement creative solutions in education that respond to changes in health care and society, and engage in public discourse that advances the physical therapy profession.

Partners who help promote and support the ELI Fellowship include the American Physical Therapy Association, American Council of Academic Physical Therapy, Education Section of the American Physical Therapy Association, and the PTA Educators Special Interest Group. Find more information about the ELI Fellowship on [APTA's website](#), and view video testimonials of ELI graduates [on YouTube](#).



2015 ELI Fellow graduates, and their academic and APTA section affiliations, are identified from the back row to the front row and from left to right:

Marie A. Johanson, PT, PhD, OCS (Emory University, education, orthopaedics, research); **Christine McCallum, PT, PhD** (Walsh University, education, geriatrics, health policy and administration); **Jean Fitzpatrick Timmerberg, PT, PhD, MHS, OCS** (Columbia University, education, orthopaedics, sports physical therapy); **Frank James Bates, PT, DPT, MBA** (University of Indianapolis, education, geriatrics, health policy and administration, orthopaedics); **Tyler Joseph Cuddeford, PT, PhD** (George Fox University, education); **James W. Farris, PT, PhD** (A. T. Still University, education); **W. Justin Jones, PT, DPT, OCS** (Simmons College, education, orthopaedics); **Brent Alfred Harper, PT, DPT, DSc, PhD, OCS, CSCS, Cert MDT, FABS, FAAOMPT** (Radford University, education, orthopaedics, sports physical therapy); **Matthew P. Ford, PT, PhD** (Samford University, education, health policy and administration, neurology, research); **Karen Huhn, PT, PhD, MS** (University of Medicine and Dentistry of New Jersey, education); **Michael McKeough, PT, EdD** (California State University Sacramento, education); **Holly Clynch, PT, DPT, MA, GCS** (St Catherine University, acute care, education, orthopaedics, private practice); **George David Fulk, PT, PhD** (Clarkson University, education, neurology, research); **Gammon M Earhart, PT, PhD** (Washington University, education, neurology, research); **Patricia R. Nelson, PT, ScD, OCS, FAAOMPT** (Eastern Washington University, education, orthopaedics, women's health); **Gregory Mark Karst, PT, PhD** (University of Nebraska Medical Center, education, research).



APTA EDUCATION LEADERSHIP INSTITUTE FELLOWSHIP

ELI FELLOW'S EXPERIENCES



**APTA EDUCATION LEADERSHIP
INSTITUTE FELLOWSHIP**



CLASS OF 2014-2015

APTA EDUCATION LEADERSHIP INSTITUTE FELLOWSHIP

Education Leadership Institute Fellows Perspectives

- Education Leadership Institute Personal Goals
- Lessons Learned
- Institutional Leadership Project Summary

Education Leadership Institute Fellows

- Frank J. Bates, PT, DPT, MBA
- Holly Clynch, PT, DPT, MA, GCS
- Tyler Joseph Cuddeford, PT, PhD
- Gammon M. Earhart, PT, PhD
- James W. Farris, PT, PhD
- Matthew P. Ford, PT, PhD
- George David Fulk, PT, PhD
- Brent Alfred Harper, PT, DPT, DSc, PhD, OCS, CSCS, Cert MDT, FABS, FAAOMPT
- Karen Huhn, PT, PhD, MS
- Marie A. Johanson, PT, PhD, OCS
- W. Justin Jones, PT, DPT, OCS
- Gregory Mark Karst, PT, PhD
- Christine McCallum, PT, PhD
- Michael McKeough, PT, EdD
- Patricia R. Nelson, PT, ScD, OCS, FAAOMPT
- Jean Fitzpatrick Timmerberg, PT, PhD, MHS, OCS



FRANK J. BATES, PT, DPT, MBA

Education Leadership Institute Fellowship Goals

1. Improve skills and increase knowledge in student assessment and outcomes assessment to aid in decision making about future changes in the physical therapist assistant (PTA) program.
2. Position the PTA program for continued success given changing health care dynamics.
3. Further develop my leadership skills to become a more directed and efficient leader in higher education.

3 Lessons Learned Through the Education Leadership Institute Fellowship

1. To be an effective leader, it is important to match other people's communication styles. While this seems uncomfortable at first, it can become comfortable with practice and patience.
2. To be an effective leader, it is important to be authentic and vulnerable. Being authentic and vulnerable allows for personal and professional growth, but first it requires the leader to engage in honest self-reflection.
3. An effective leader understands that more can be accomplished by concentrating on the big picture when the right people are in place to concentrate on the details.

Institutional Leadership Project Summary

My leadership project involved developing a forward-thinking, future-oriented style of program assessment for the PTA program. This project includes mapping the PTA program outcomes to the syllabus outcomes and to CAPTE standards, implementing surveys to stakeholders in the PTA program on a routine basis, making changes based on survey results, and performing a routine SWOT (strengths, weaknesses, opportunities, and threats) analysis. This project will take the current assessment process from one of meeting the minimum requirements to one that is focused on the health of the PTA program. Faculty will become more engaged in program assessment by being integral to making well-informed decisions about adjustments to the curriculum and other aspects of the PTA program.

HOLLY CLYNCH, PT, DPT, MA, GCS

Education Leadership Institute Fellowship Goals

1. Improved skill in running a meeting, as measured by my ability to listen more than talk, to allow all voices to be heard, and to delegate comfortably and confidently.
2. Improved comfort with articulating my thoughts clearly, especially when under stress, and with taking constructive criticism at the time it is delivered.
3. Improved understanding of the program director's fiscal responsibilities within the program and within the university as a whole.

3 Lessons Learned Through the Education Leadership Institute Fellowship

1. For program development and program assessment, always start with what you want the final outcome to be, and then work backward.
2. Think of delegation as a way of empowering others to develop and show their strengths. You are not merely giving them more to do!
3. Course syllabi should always remain the property of the program, not the individual course instructor. As a program director, you have ultimate responsibility for their content.

Institutional Leadership Project Summary

I developed a draft program of study for a bachelor of science (BS) for the physical therapist assistant (PTA), designed as a degree-completion option for PTAs who already have an associate degree. Using data collected from students, program graduates, faculty, other PTA programs, and our community advisory committee, a draft of the required courses has been developed and will be submitted to our University Curriculum Assessment and Policies Committee for approval during fall semester 2015, with students to be admitted for an anticipated fall 2016 starting date.

TYLER JOSEPH CUDDEFORD, PT, PHD

Education Leadership Institute Fellowship Goals

1. Learn how to navigate the academic side of leadership structure.
2. Explore the various models of leadership.
3. Understand my leadership strengths and weaknesses.

3 Lessons Learned Through the Education Leadership Institute Fellowship

1. Great leaders work toward overarching goals and have a purpose and plan for attaining them.
2. Understanding all 4 different types of leadership “frames” helps position you for better communication and effectiveness with those who operate on a different set of frames than you.
3. Collaboration with the various leaders helped me understand issues that were similar across institutions.

Institutional Leadership Project Summary

Preventable lifestyle diseases such as heart disease, stroke, cancer, obesity, and diabetes are the leading causes of mortality and morbidity. Physical therapists are ideally suited and trained to promote health and wellness in their communities and to address these preventable diseases. The purpose of this ELI Leadership project was to create and use a comprehensive health and wellness screening tool for physical therapists (in this case, including students) to use in local communities. This will also involve using health and wellness mobiles (3 15-passenger vans) driven to rural communities and partnering with local schools, community centers, churches, and/or retirement centers. Current progress includes the completed screening tool that was created as a mobile application to be used either on an iPad or iPhone. The mobile application includes orthopedic, neurological, cardiovascular and pulmonary, diabetes, and overall health/nutritional assessments. The result is a single-page output that compares the individual's results to normative values, similar in principle to what you would receive after a blood test. The result would also highlight areas that need improvement or potential risks. Additional work included creating marketing, educational, and communication materials (pamphlets, posters, and email blasts), communicating with local partners, and finding physical therapists who want to be involved. Screening in the rural communities is scheduled during National PT Month in October.

GAMMON M. EARHART, PT, PHD

Education Leadership Institute Fellowship Goals

1. Develop a clear and consistent strategy for identifying, recruiting, mentoring, and retaining top talent.
2. Strategize to achieve and maintain balance that allows me to remain productive, healthy, and engaged at work and at home.
3. Grow new leaders within our organization and develop a clear succession plan.

3 Lessons Learned through the Education Leadership Institute Fellowship

1. It is important to understand one's own style, strengths, and weaknesses in order to be an effective leader. As such, time devoted to self-reflection is time well-spent.
2. When you work with a great team, it is important to support them and also to stay out of their way so they can do a great job.
3. Walking around and talking to people informally is a great way to build relationships, stay connected, and learn more about your organization. I now block time on my calendar to "walk around" every week.

Institutional Leadership Project Summary

The Program in Physical Therapy at Washington University in St Louis School of Medicine experienced a leadership transition, and the time was right to revisit the program mission and vision and define explicit goals for the future. As such, the purpose of this strategic planning project was to develop a mission, a vision, and goals with action plans, focusing on the next 4 years of program growth. A strategic planning consultant from the business world was engaged to facilitate the process, which included these stages: (1) selection of core planning team of faculty and staff; (2) diagnostic phase to gather and synthesize stakeholder perspectives obtained through focus groups, one-on-one interviews, and online surveys; (3) formulation of mission and vision, 4) development of prioritized goals; (5) generation of action plans to achieve goals, including timeline and accountability for all items; (6) roll-out of full strategic plan within program and to higher level administration; and (7) ongoing monitoring of progress, with regular reports on achievements and resulting impacts.

JAMES W. FARRIS, PT, PHD

Education Leadership Institute Fellowship Goals

1. Learn skills and strategies to become more competent and confident in the leadership role.
2. Be more than just a manager and lead in a manner that encourages faculty success, growth, and enjoyment of the profession.
3. Learn additional personal interaction skills that will enhance my enjoyment of academic leadership throughout my career.

3 Lessons Learned Through the Education Leadership Institute Fellowship

1. In order to begin to understand others, you have to deeply understand yourself.
2. Communication, relationship building, empowering others, and the ability to be vulnerable are foundational components of leadership.
3. Reflection is often overlooked and underrated. Good leadership requires regular and frequent self-reflection.

Institutional Leadership Project Summary

My leadership project involved restructuring the DPT program curriculum so that it can be delivered in the time frames of the university's new academic calendar. The school is currently on a 12-week quarter system. The new calendar is not a traditional academic calendar and consists of 2 21-week semesters (with two 10-week blocks within each semester), with a shortened summer "institute." The academic year will begin in July instead of late August, as it currently does. This is an opportunity to implement a curriculum that is built by the current faculty, designed with outcomes defined before the process is developed, has better content flow, and is possibly less volume-intensive—allowing for student reflection and intentional practice for higher skill acquisition in the program. The project involved collaborative interaction with (and input from) all DPT faculty, curriculum committees, the registrar, student affairs and financial aid, finance and administration, facilities and room scheduling, and upper administration. The logistics of teaching out the current curriculum while simultaneously implementing the new curriculum was the most difficult component of the project.

MATTHEW P. FORD, PT, PHD

Education Leadership Institute Fellowship Goals

1. Successfully lead the development of a new physical therapist (PT) department in a new school and college to achieve its expected program outcomes over 10 years.
2. Lead a group of colleagues in the development of a comprehensive interprofessional education program.
3. Lead the development of a comprehensive health and wellness program for people with Parkinson disease.

3 Lessons Learned Through the Education Leadership Institute Fellowship

1. You can develop the administrative skills to work in any frame of reference.
2. Budget development and implementation should be tied to goals and outcomes.
3. Fix problems when first identified. Don't wait, don't delay.

Institutional Leadership Project Summary

My project was to facilitate the implementation of interprofessional education (IPE) into the curricula and general program activities for the College of Health Sciences (CHS). My role is to represent the PT program and serve on the Administrative Council Task Force on IPE. In addition to that role, I teamed up with colleagues in CHS and participated in an Interprofessional Education Collaborative (IPEC) workshop (fall 2015). During the workshop, our group was charged to develop a project that we can bring back to CHS and implement. Our project was the first step toward my ELI project. On August 19, 2015, we gathered 300 CHS graduate students and introduced IPE, the core competencies, and had them examine the practice acts of their discipline, as well as the practice acts of the disciplines of their student colleagues (pharmacy, family nurse practitioner, speech therapy, public health, physical therapy, and nurse anesthesia). This introduction included a presentation on the 4 core competencies of IPEC.

GEORGE DAVID FULK, PT, PHD

Education Leadership Institute Fellowship Goals

1. Analyze leadership situations and apply appropriate leadership styles to promote optimal outcomes.
2. Appreciate and understand contemporary issues facing physical therapy education and higher education.
3. Develop a network of colleagues in physical therapy education.

3 Lessons Learned Through the Education Leadership Institute Fellowship

1. Gained a better understanding of different aspects of higher education, such as student affairs, human resources, budgeting, etc.
2. Reflection is an important component of leadership growth.
3. All PT programs are facing similar issues regardless of size and institution in which they reside. PT programs need to work together to address the many issues currently facing higher education.

Institutional Leadership Project Summary

The purpose of this ELI Leadership project was to review and revise the Clarkson University DPT program's mission, goals, and outcomes through a collaborative faculty process and to develop a policy, procedure, and database by which the program will be able to systematically and continually review the program mission, goals, and outcomes to foster effective program development. During the winter 2015 semester, the program faculty reviewed the current mission, goals, and outcomes, and drafted modifications to these. The faculty voted on the final mission, goals, and outcomes at the annual faculty retreat in the middle of August. Based on the new mission, goals, and outcomes, I have begun to develop specific policy and procedures, as well as a database to store pertinent outcome information that will guide decision making and an ongoing program review process.

BRENT ALFRED HARPER, PT, DPT, DSC, PHD, OCS, CSCS, CERT MDT, FABS, FAAOMPT

Education Leadership Institute Fellowship Goals

1. To obtain an understanding of my leadership style.
2. To gain an appreciation and understanding of other leadership styles.
3. To learn and understand the components, departments, and positions that comprise academic institutions, while learning how each is related to and reliant on the others for success.

3 Lessons Learned Through the Education Leadership Institute Fellowship

1. The ability to reframe is vital for understanding oneself, understanding which leadership frame(s) one gravitates toward, and giving clarity to other frames.
2. Leading from the middle requires being comfortable with knowing who you are and why you think the way you do, and stepping back to see the world through a different paradigm. To be vulnerable, you must be individually secure. This in no way equates with weakness but rather comes from a position of strength: strength in decisions and confidence while being objective. It is what I call “vulnerability strong.”
3. To be an effective leader you must take a journey of self-discovery. You need to understand why you think the way you do, why you make decisions the way you do, and why you may react the way you do. Self-discovery may be an uncomfortable process, as you may not like what you find. However, the beautiful aspect is that you can define you. Your reaction or responses need to be based on who you are, not simply reacting to situations or people. You are the sole owner of your behavior, decisions, and responses. Do not let others dictate your behavior.

Institutional Leadership Project Summary

My leadership project further develops the physical therapy department’s vision, program growth, and community integration by researching and designing a residency in orthopedic physical therapy. This residency was 1 of our programs 6- to 10-year “visionary initiatives.” Initially we will develop a certificate program that will be the didactic portion of the residency program. The program will offer access to high-level education as continuing education, as preparation for specialty board examination, as a certification program, and as a residency program.

KAREN HUHN, PT, PHD, MS

Education Leadership Institute Fellowship Goals

1. Develop leadership skills necessary to obtain a leadership position within the Education Section.
2. Improve my confidence in leadership skills and insight.
3. Develop skills in effective communication to promote collaboration and unified vision.

3 Lessons Learned Through the Education Leadership Institute Fellowship

1. You have to know yourself before you can be an effective leader.
2. There are no shortcuts to effective leadership. It takes a substantial amount of time and effort, and is a lifelong process.
3. Always seek an opportunity where you can learn something new, not show what you know.

Institutional Leadership Project Summary

My project was to develop and facilitate strategic planning for our Doctor of Physical Therapy program. The project pushed me to learn more about effective strategic planning, including the processes and techniques that can be used, how to gather data, and to facilitate and keep a group focused on the goals and moving forward. We have completed the initial meeting, in which we established goals for the strategic planning process, revised our mission statement, created a vision statement, and revised our program outcomes to reflect our new mission and vision. We have created subgroups charged with collecting additional data as needed, creating and implementing a plan to achieve the strategic planning goals as well as a plan to assess achievement of the goal. The subgroups are reporting on their progress to the faculty at monthly faculty meetings. We have chosen a 3-year strategic planning process, so I to look forward to future challenges and outcomes.

MARIE A. JOHANSON, PT, PHD, OCS

Education Leadership Institute Fellowship Goals

1. Become a more efficient and directed leader in academic physical therapy.
2. Effectively empower faculty to facilitate positive changes in physical therapy education.
3. Develop a collaborative vision that will guide progressive excellence in physical therapy education.

3 Lessons Learned Through the Education Leadership Institute Fellowship

1. Leaders in academic physical therapy are not alone, nor can they operate successfully on their own.
2. Awareness and proper utilization of all academic resources is essential to successful administration.
3. The profession is and will continue to be stronger with the help of graduates from the ELI Fellowship program.

Institutional Leadership Project Summary

My leadership project was to develop the format for partnered postprofessional residency and fellowship programs with the local clinical community that would be centralized around the physical therapist program. The creation of these programs is in direct alignment with the program's new vision as being composed of community-based clinical experts, and the mission to cultivate clinical excellence in physical therapy. These initiatives are also directly aligned with my university's goal of being the leading partnership university, and my college's goal to "strengthen communities and change lives." These initiatives have led me to targeting a diverse array of clinical residency and fellowship programs, which would be offered in a synchronous fashion. My leadership project has been to develop formats for the delivery of such partnered programs in various specialty settings and targeted partnership institutions, and to assess the feasibility of and design the projected programs.

W. JUSTIN JONES, PT, DPT, OCS

Education Leadership Institute Fellowship Goals

1. To take advantage of leadership opportunities within my college with more confidence and a greater understanding of the processes, procedures, and personnel involved in higher education.
2. To continue to develop as a leader in my role as associate chair of the physical therapy department by applying concepts learned in ELI to current department goals and objectives.
3. To attain a leadership position within an organization outside of higher education that allows application of the skills learned in ELI to other leadership roles.

3 Lessons Learned Through the Education Leadership Institute Fellowship

1. Leaders with different values and beliefs can be successful if they can create trust, fairness, and credibility in those they support.
2. Oftentimes, identifying an overall “fit” for a college, school, or program when hiring at any level is critical to the retention and success of faculty and staff, despite pressure to fill a position with an individual with specific “credentials.”
3. Relationships are critical to leadership success.

Institutional Leadership Project Summary

My ELI project consisted of leading the process of reviewing, modifying, and updating policies related to student progression within the DPT program, and integrating some of the common policy language found across the School of Nursing and Health Sciences (SNHS), which includes physical therapy, nursing, and nutrition. This project started with a recognized need to refine and update the existing DPT policies related to student progression, based on some past challenges and inconsistencies in interpreting the policy language. The project expanded into a larger project when other programs within SNHS acknowledged similar needs, and the opportunity to have more consistency was realized. These needs focused on all aspects of progression, including academic, professional behavior, and withdrawal/leave of absence from the program. The initial outcome was to have the DPT faculty vote on revisions for its handbook, which has happened. Secondary outcomes are to have the other programs adopt key elements of policy and language applicable to their programs, and vote on revisions for their respective handbooks. Additionally, a formal review process to review and update these policies will be established.

GREGORY MARK KARST, PT, PHD

Education Leadership Institute Fellowship Goals

1. Networking with additional educators and administrators from across the country.
2. Gaining insight into my current strengths and weaknesses as an educational administrator.
3. Learning new strategies for change management and dealing with conflict.

3 Lessons Learned Through the Education Leadership Institute Fellowship

1. The vast (and largely new to me) literature on leadership styles and strategies provides a broad range of tools from which to choose in attempting new approaches to difficult leadership issues.
2. Gaining insight into my current strengths and weaknesses relative to leadership roles is important, but continued self-reflection on how those traits affect my everyday performance is essential.
3. My most vexing problems of leadership are commonly encountered by my peers in this endeavor. In-depth discussions of those issues with peers and mentors in ELI were among the most enlightening and enjoyable aspects of my participation in this fellowship.

Institutional Leadership Project Summary

My project was to promote interprofessional education (IPE) at a new site on a rural campus 190 miles from the main academic health science center campus, coordinating between 7 programs within my college, 2 colleges at my university, and 2 universities within the state university system. The desired outcomes include:

1. replication on the new campus, via synchronous and asynchronous methods, of IPE activities carried out on the original campus;
2. development of new IPE activities within and outside of the formal curricula at the new campus;
3. reducing duplicate teaching efforts with modular units that address educational objectives that are shared across programs and colleges;
4. development of new models of interprofessional clinical education in addition to activities during the didactic phases of the programs;
5. fostering a culture of interprofessional collaboration in health professions education that permeates didactic and clinical phases of those programs.

To date, we have begun replicating existing activities on the new campus and are implementing new extracurricular activities unique to the new campus. We anticipate that achieving the ultimate goal of a cultural shift to take 5 or more years.

CHRISTINE MCCALLUM, PT, PHD

Education Leadership Institute Fellowship Goals

1. Improve my skills in negotiation and conflict management.
2. Develop an appreciation for the interconnectedness amongst the various departments and personnel within the academy.
3. Develop improved self-confidence to realize avenues where I could contribute to the advancement of physical therapist education particularly in, clinical education locally, regionally, and nationally.

3 Lessons Learned Through the Education Leadership Institute Fellowship

1. Leadership is a philosophy, not a position.
2. It's all about the people. Electing the right people to do the right job at the right time is imperative to moving an academic program forward in today's marketplace.
3. Strategic thinking is a cornerstone for strategic planning. Keeping the end in mind while collaborating to identify common goals and figuring out "where we are now," "where we want to go," and "how we are going to get there" sets the stage for success.

Institutional Leadership Project Summary

My leadership project goal was to guide our DPT faculty in evaluating our current curriculum and devising a plan to revise it to ensure our graduates will meet future professional, societal, community, and institutional needs. The expected outcome at the start of this fellowship was to have a suggested outline for a revised DPT curriculum by July 2015. However, based upon programmatic needs, the date was revised and is now ongoing. Instead, developing a more effective systematic process for curriculum review and assessment became the goal for July 2015.

The process over the past 12 months included: (1) review of all course syllabi objectives for compliance with CAPTE CC-5 criteria; (2) identification of our areas of strengths in the curriculum and areas that require enhancement based on this review process; (3) development of a curriculum committee to oversee curriculum planning, syllabi review, and course assessment; (4) faculty discussion on the 2016 CAPTE Standards and Elements for future accreditation expectations; and (5) review of the Clinical Education Summit recommendations.

We have established a foundational understanding of our program and curriculum. Our next step is to determine how our curriculum will prepare our graduates for physical therapist practice.

MICHAEL MCKEOUGH, PT, EDD

Education Leadership Institute Fellowship Goals

1. Gain a deeper understanding of myself as relates to the requirements for directing a physical therapy education program.
2. Begin to read and understand the literature on leadership.
3. Begin to develop the skills needed as director of a physical therapy education program.

3 Lessons Learned through the Education Leadership Institute Fellowship

1. Know thyself particularly as it relates to the leadership frames of Bolman and Deal.
2. As stated in the literature, leadership, at least in part, consists of skills that can be learned.
3. An entire group of knowledgeable, experienced, and friendly ELI fellows and mentors is ready, willing, and able to help me when I get in over my head.

Institutional Leadership Project Summary

My ELI project consisted of reorganizing the first-year curriculum of a DPT education program to increase the use of patients/volunteers in the laboratory procedures classes. During the first 3 semesters of the program, students received very little experience working with anyone other than peers from their cohort while developing psychomotor and communication skills.

Initial challenges included: faculty/staff buy-in to the use of patients/volunteers in labs (faculty and staff have agreed to give it a try); recruiting patients/volunteers (some patients who attend pro bono clinics have agreed to participate); securing administrative assistance for program management such as scheduling (an assistant will manage the program); and equipment for use in the program (we will receive equipment for procedures classes plus 10 iPads to record student performance for self-assessment).

Unresolved challenges include the need to recruit more patients/volunteers, measuring educational effects of the program, remuneration for volunteers, and university parking.

PATRICIA R. NELSON, PT, SCD, OCS, FAAOMPT

Education Leadership Institute Fellowship Goals

1. Develop my leadership skills through understanding my own strengths as well as areas for growth.
2. Understand the business of higher education and the functions of each operating unit.
3. Build relationships outside my institution to foster future collaboration.

3 Lessons Learned Through the Education Leadership Institute Fellowship

1. By learning the language and skill set of leadership, I now have tools to use that can foster my ongoing development. I plan to use these to seek out leadership opportunities and identify areas where I can make a positive difference both personally and professionally.
2. Using the leadership frames has proved an excellent way to consider how I approach conversations in all aspects of my work, and forced me to improve my active listening.
3. Strategies and approaches to enable finding a “shared vision” have provided a means to enjoy the collaboration and problem-solving opportunities within my organization, and to approach these situations from a positive perspective.

Institutional Leadership Project Summary

My leadership project was to guide the process for changing from a quarter to semester curricular calendar. While change is difficult, this project allowed the opportunity for faculty to identify the program’s strengths and areas for revision. To identify these, stakeholder focus groups were formed to solicit input through an individual and then group process. Themes identified in these groups were then incorporated into curricular models that hold constant the areas of strength and improve the areas in need of change. Moving forward, faculty discussion and visioning will take place over the next academic year related to this calendar revision, with a final curriculum identified during the upcoming academic year. Timeline for completion of this project is set for fall 2016, with implementation in the following academic year.

JEAN FITZPATRICK TIMMERBERG, PT, PHD, MHS, OCS

Education Leadership Institute Fellowship Goals

1. To understand different leadership styles and when best to utilize different frameworks.
2. To enhance and become more confident in my leadership skills, especially when navigating the politics of academia.
3. To utilize additional knowledge gained to participate in leadership roles outside of my institution, particularly within the American Council of Academic Physical Therapy (ACAPT) and APTA.

3 Lessons Learned Through the Education Leadership Institute Fellowship

1. Identifying colleagues who share similar interests and would work well together is a crucial step when creating teams to work on projects. More time initially spent creating the teams will become truly valuable.
2. Active listening, effective communication, and daily reflection are essential activities of any leader.
3. Continued visibility and frequent communication are imperative at fostering current partnerships and even more vital at building new ones.

Institutional Leadership Project Summary

My project was to develop an interactive I-book for our Musculoskeletal I and II courses. The I-book would be an interactive lab and lecture manual with links to prerecorded lectures traditionally given in the classroom (flipping the classroom), textbooks, videos demonstrating psychomotor skills, glossary terms, cases, and quizzes, as well as additional resources (for example: preloaded applications that relate to anatomy, orthopedic special tests, orthopedic manual therapy, and exam questions).

Approximately 25% of the videos demonstrating psychomotor skills and 90% of the didactic content have been recorded and professionally edited for insertion into the I-book. Discussions with Apple Education are ongoing to lease the I-books and have all the applications preloaded. The anticipated start date is summer 2016, and outcomes to be assessed will be time outside the classroom spent by faculty to meet and remediate with students, student performance on written and practical exams, and clinical reasoning assessments. These outcomes will be compared to the same data from previous classes given in the traditional format.



ABPTRFE
ACCREDITED PROGRAM

ELI Reaccreditation
Page 549



APTA
American Physical Therapy Association.



Application Deadline

March 1, 2016

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ELI Reaccreditation

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The Next Generation of Leaders!

The Education Leadership Institute's goal is to develop PT and PTA education program directors with leadership skills to facilitate change, think strategically, and engage in public discourse to advance the physical therapy profession.



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March 4, 2016

RE: ELI Fellow-in-Training for 2016-17

Dear

Congratulations on your acceptance into the sixth cohort of the ABPTRFE-accredited Education Leadership Institute (ELI) Fellowship for 2016-17! We recognize that this is a significant one year commitment and believe that the time spent in the program will be worthwhile in relation to personal and professional leadership, management, and building community networks. There will be a total of 18 fellows-in-training and 6 mentors participating in the ELI Fellowship during the 2016-17 term scheduled to begin in July. We look forward to your contributions and learning from you throughout this process as we begin this journey together.

You will be assigned to a mentorship group (green, blue, or orange) by July. Each group will consist of 2 assigned mentors and 6 fellows-in-training.

All fellows-in-training and mentors are required to participate in a 2-hour orientation webinar in July (date TBD). You will soon be invited by the ELI program director to complete a Doodle poll indicating your availability for the orientation. During the first hour you will participate in a 1-hour conference call, Google Hangout, or Skype with your assigned mentorship group to get acquainted; become more familiar with the roles and responsibilities of mentors, fellows-in-training, and mentorship groups; and to develop group strategies for approaching monthly virtual meetings of your mentorship group throughout the year. During the second hour of the orientation you will join a webinar (with your local web camera turned on) with all fellows-in-training and mentors to learn more about how to access and use technologies associated with this program and the overall requirements for the fellowship.

The connection information and related materials for the mandatory orientation will be shared with you via an online e-community for all 2016-17 ELI fellows-in-training and mentors. This private community will be hosted on the APTA Hub, a members-only section of the APTA website. You will receive separate email instructions by June on how to login to your new ELI community. You will also receive a list of the required texts for your first 3 online Modules several weeks prior to the orientation session to allow you sufficient time to obtain these resources.

The first onsite session of the ELI Fellowship is scheduled on October 5-6, 2016 (Wednesday-Thursday) at the Pointe Hilton Tapatio Cliffs Resort in Phoenix, Arizona. The first session begins at 7:30 am on October 5, so plan to travel and arrive in Phoenix on October 4. Do not make your hotel reservation until you receive the link and code for the discounted rate this summer. This first face-to-face session is intentionally scheduled to precede the [Education Leadership Conference \(ELC\)](#), an event co-sponsored by the APTA Education Section and the American Council of Academic Physical Therapy (ACAPT) on October 7-9, 2016 in the same location. You are strongly encouraged to attend ELC to

network with previous ELI Fellow graduates, current DPT and PTA program directors, academic and clinical faculty, and education leaders. As part of its support of the ELI Fellowship Program, the Education Section pays the full ELC registration fee for enrolled ELI Fellows-in-Training who are members of the Education Section and a partial registration for those who are not Education Section members.

As a part of your acceptance into this program, you are asked to commit to the values and ideals that ELI aspires to achieve by signing and returning a scanned copy of the attached covenant by March 15, 2016 to libbyross@apta.org.

Likewise, as a part of your academic institution's commitment, you will be receiving an invoice from APTA's finance department for the initial tuition payment of **\$2000 due by May 15, 2016** with the remaining balance of **\$4000 to be paid by no later than July 1, 2016** prior to the launch of ELI. Your institution may elect to pay the entire tuition with this bill if funds have already been earmarked for this fiscal year. Please provide the name and title of the person, full address, phone number, and email where the invoice should be mailed (and e-mailed) at your academic institution by March 15, 2015 to libbyross@apta.org.

Given that this fellowship program is designed to explore all aspects of higher education leadership and its relationship to physical therapy education, it is important to familiarize yourself with CAPTE's newly revised Standards and Required Elements for the Accreditation of Physical Therapist (pp 12-13) and Physical Therapist Assistant (pp 12-13) education programs and the requirements to serve as a program director that went into effect on January 1, 2016. These documents are relevant to this fellowship program in understanding the expected qualifications, roles, and responsibilities of the program director.

We look forward to providing you with ongoing correspondence about the Education Leadership Institute Fellowship and other events and resources available to you throughout this program. We are excited about your involvement in this ABPTRFE credentialed fellowship program and look forward to working with you as a part of this yearlong journey!

Respectfully,

Education Leadership Institute Work Group

EDUCATION LEADERSHIP INSTITUTE FELLOWSHIP
Program Director
Position Description

The Program Director strategically leads and manages the Education Leadership Institute (ELI) Fellowship.

Performance Standards

- Ensures the program's compliance with the provisions of the current version of the ABPTRFE Evaluative Criteria and Rules of Practice and Procedure.
- Provides annual reports to ABPTRFE about the ELI Fellowship in accordance with defined standards and documentation requirements.
- Provides leadership for all stakeholder groups and required components associated with the ELI Fellowship.
- Manages all aspects of the ELI Fellowship in coordination with the ELI Fellowship Work Group and associated work groups.
- Provides leadership in ongoing communications with all stakeholders associated and involved with the ELI Fellowship for its smooth operation.
- Promotes the ELI Fellowship program through a variety of marketing mechanisms.
- Manages all contracts and financial aspects associated with the program including tuition, faculty contracts, professional fees, onsite sessions, graduation, certificates and pins, and honoraria.
- Collects data about the fellowship program to assess and track outcomes, identify strengths and areas for improvement, and ensure the program's currency and relevance.

Substantive Change Form

Programs that are candidates or are accredited, including probationary accreditation, must submit written notification of substantive changes to the program to APTA staff no later than 30 days after the change using the prescribed form. Please refer to the ABPTRFE Rules of Practice and Procedure for what constitute a substantive change.

Please complete the form below and any related forms and submit as one PDF file to APTA staff at resfel@apta.org.

Program Name: Education Leadership Institute (ELI) Fellowship

Program Director: Elisabeth “Libby” J. Ross

Substantive Change (please select all that apply):

<u>Change</u>	<u>Date Effective</u>
<input type="checkbox"/> Change in sponsoring organization (<i>complete the corresponding section below</i>)	
<input type="checkbox"/> Change in program’s mission, goals, and/or objectives (<i>complete the corresponding section below</i>)	
<input checked="" type="checkbox"/> Change in leadership (<i>complete and submit the Program Director/Coordinator Information form</i>)	1/1/2016
<input type="checkbox"/> Addition of a didactic or clinic site(s) (<i>complete and submit the Addition of a Site form</i>)	
<input type="checkbox"/> Change of course content (<i>complete the corresponding section below</i>)	
<input type="checkbox"/> Change in the method of delivery of the program (<i>complete the corresponding section below</i>)	
<input type="checkbox"/> Substantial increase or decrease in total program hours (<i>complete the corresponding section below</i>)	

Change in Sponsoring Organization

Name of sponsoring organization:
Provide the statement of mission and goals of the sponsoring organization of the program. If the program has more than one sponsoring organization, provide the statement of mission and goals for all sponsoring organizations:
Describe the sponsoring organization’s ongoing methods used to evaluate the effectiveness of the sponsoring organization’s performance. Include evidence of any external agency accreditations (eg, Joint Commission, CARF, Medicare provider or provider network standards, CAPTE or another educational accreditation organization if applicable). If the program has more than one sponsoring organization, provide this information for all sponsoring organizations:
Describe how the program’s mission, goals, and objectives are consistent with the mission of the sponsoring organization(s):
Describe any changes to program policies and procedures as a result of this change to the program’s sponsoring organization (<i>provide updated policies if applicable</i>):

Describe any changes to the program participant contract or letter of appointment as a result of this change to the program's sponsoring organization (*provide updated contract if applicable*):

Describe any changes to program faculty (didactic and clinical) as a result of this change to the program's sponsoring organization.

Complete the following form for all new faculty:

NAME (with credentials)	ABPTS CERTIFICATION/RECERTIFICATION (Designate initial year certified/Expiration of most recent certification/recertification)
TITLE	<input type="checkbox"/> Cardiopulmonary (Effective Date) (Expiration Date) <input type="checkbox"/> Clinical Electrophysiology (Effective Date) (Expiration Date) <input type="checkbox"/> Geriatric (Effective Date) (Expiration Date) <input type="checkbox"/> Neurologic (Effective Date) (Expiration Date) <input type="checkbox"/> Orthopaedic (Effective Date) (Expiration Date) <input type="checkbox"/> Pediatric (Effective Date) (Expiration Date) <input type="checkbox"/> Sports (Effective Date) (Expiration Date) <input type="checkbox"/> Women's Health (Effective Date) (Expiration Date)
Number of hours per week dedicated to the residency/fellowship program:	OTHER CERTIFICATIONS/ASSOCIATION STATUS (Designate initial year certified/Expiration of most recent certification/recertification)
PLACE OF EMPLOYMENT	<input type="checkbox"/> Certified Hand Therapist (Effective Date) (Expiration Date) <input type="checkbox"/> FAAOMPT or Member of AAOMPT: <input type="checkbox"/> Yes <input type="checkbox"/> No
SITE WHERE FACULTY PROVIDES INSTRUCTION/MENTORING	<input type="checkbox"/> Certified Wound Specialist (Effective Date) (Expiration Date) <input type="checkbox"/> Other: (Effective Date) (Expiration Date)
AREAS OF RESPONSIBILITY IN PROGRAM	
RECENT PROFESSIONAL DEVELOPMENT ACTIVITIES (i.e., continuing education, publications, research, etc.)	

Describe any changes in professional development opportunities and resources that allow faculty to maintain and improve their effectiveness as clinicians and educators as a result of this change to the program's sponsoring organization:

Describe any impact on the program's current sources of funding, or funding throughout the period of accreditation, as a result of this change to the program's sponsoring organization:

Describe any changes to educational resources, including methods of access, available to faculty and program participants as a result of this change to the program's sponsoring organization:

Change in program's mission, goals, and/or objectives

Provide the program's mission statement, goals and objectives. Multi-site programs must include at least one goal and corresponding objectives addressing consistency of program delivery in all settings:

Describe how the program's mission statement, goals, and objectives are consistent with one another:

Describe how the program's mission, goals, and objectives are consistent with the mission of the sponsoring organization(s).

Change of course content

Describe any changes to the program's curriculum (clinical and/or didactic) that represents a significant departure from existing offerings of the program.

Provide the major content areas of the program's curriculum and their relationship to the DSP/DRP/DASP/DSSP/analysis of practice or comprehensive needs assessment using [form template 3.1.2.A](#) located on the ABPTRFE website under Application Resources. For those programs in areas without a form template, use the generic form.

Describe any changes to the program's curriculum sequencing as a result of this change in course content and briefly explain the rationale behind this sequencing:

Provide the course syllabi, including course description, educational objectives, requirements for successful completion, and instructional methods for any courses added.

Change in method of delivery of the program

Has the program made any of the following changes:

- Teaching methods (eg, in-person versus distant learning) Yes No
- Program offering (eg, part-time to full time) Yes No
- Educational tracks (eg, offering both part-time and full-time or offering both in-person and distant learning)
 Yes No

If yes, briefly describe the rationale behind this change

If the program provides more than one educational track (eg, both part-time and full-time) provide the length of the program for each educational track:

Provide an outline or flow chart of the overall sequencing of content in the program's curriculum, for each educational track, across the entire time period of the residency or fellowship, including both didactic and clinical experiences.

Briefly explain the rationale behind the organization and sequencing of the curricular content for each educational track:

Describe how the program ensures congruency between the didactic and clinical aspects of the curriculum for each educational track:

Substantial increase or decrease in total program hours

Identify the minimum and maximum amount of time (in months) allowed for the participant to complete the program that is inclusive of remediation and leave of absence periods.

Use the Form below to list the number of hours the program plans to dedicate to each instructional method used to achieve the performance outcomes.

PROGRAM COMPONENT	TOTAL HOURS IN PROGRAM
INSTRUCTIONAL HOURS	
Classroom Instruction (List all courses)	
Journal Club	
Research Activities	
Home or Independent Study Course(s)	
Grand Rounds	
Other: (Please list)	
INSTRUCTIONAL HOURS SUBTOTAL	
CLINICAL MENTORING	
(minimum of 150 hours for residency; 100 hours for fellowship; 130 hours for orthopaedic manual physical therapy fellowships). For non-clinical programs, please provide a total of mentoring hours provided to the participant over the course of the program.	
<ul style="list-style-type: none"> 1:1 clinical mentoring/instruction from physical therapist clinical faculty while program participant is treating patients (minimum 100 hours for residency; 50 for fellowship; 110 hours for orthopaedic manual physical therapy fellowship) 	
<ul style="list-style-type: none"> 1:1 patient/client related planning/discussion/review of participant's caseload and/or physical therapist mentor demonstrating treatment techniques on patients 	
MENTORING HOURS SUBTOTAL	
CLINICAL HOURS	
Clinical Practice	
Clinical Observation	
Mentoring provided by a non-PT mentor	
Athletic Venue Coverage (sports residency/fellowship programs only)	
CLINICAL HOURS SUBTOTAL	
GRAND TOTAL HOURS IN PROGRAM	


Signature of Program Director

1/11/16
Date


Signature of Organization Administrator

1/11/16
Date

Program Director/Program Coordinator Information Form

Please print all information.

Full Name and Credentials: Elisabeth “Libby” J. Ross, MA	Name of Residency/Fellowship Program: Education Leadership Institute Fellowship
Title: <input checked="" type="checkbox"/> Program Director <input type="checkbox"/> Program Coordinator	
Phone Number: 703-706-3326	Email Address: libbyross@apta.org
Number of hours per week dedicated to the residency/fellowship program: 10	
Has there been a change in the program director’s job description from what was previously filed? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
If yes, please provide the program director’s job description that includes ensuring the program’s compliance with the provisions of the current version of the ABPTRFE Evaluative Criteria and Rules of Practice and Procedure.	
<i>For program directors of <u>developing and candidate</u> programs only:</i>	
Have you taken the Residency/Fellowship 101 Course? <input type="checkbox"/> Yes <input type="checkbox"/> No	
If yes, please attach a copy of the course certificate to this form.	
If no, have you previously been a program director of an APTA-accredited residency or fellowship program? <input type="checkbox"/> Yes <input type="checkbox"/> No	
If yes, please provide the name of the program and the dates you were program director: Name of Program: Dates: <i>From</i> <i>To</i>	
<i>For programs enrolled in RF-PTCAS:</i>	
Please contact Kate Owen, Senior Customer Solutions Manager at kowen@liaison-intl.com to inform her of a change in program director.	
Submission of Form:	
A copy of the individual’s curriculum vitae <u>MUST</u> be included with this form.	
If submitting this form as part of an accreditation application, please embed the document and CV in the program’s application.	
If submitting this form as part of a substantive change to a program that is currently in candidate status or accredited, please convert a completed substantive change form, this form, and the curriculum vitae to one .pdf file and email it to resfel@apta.org .	

Elisabeth “Libby” J. Ross, MA

5706 Broadmoor Street ▪ Alexandria ▪ Virginia ▪ 22315 ▪ 703-508-3416 ▪ libby.j.ross@gmail.com ▪ Skype: libby.j.ross

PROFESSIONAL PROFILE

Progressive leadership experience in association management, volunteer board support, higher education, centralized application services, student recruitment, technology, diversity, project management, and international affairs. Strong interpersonal and communication skills; extensive experience in developing onsite and virtual education sessions; and a demonstrated ability to cultivate strong relationships with members, institutions, and strategic partner organizations.

EDUCATION

1992 BA, History, University of Mary Washington, Fredericksburg, Virginia
1998 MA, International Commerce and Policy, School of Public Policy, George Mason University, Fairfax, Virginia
2011 Certificate of Achievement in Leadership Excellence, American Management Association

PROFESSIONAL EXPERIENCE

AMERICAN PHYSICAL THERAPY ASSOCIATION (APTA) ALEXANDRIA, VIRGINIA

2007-present DIRECTOR, ACADEMIC SERVICES

Responsibilities include the direct supervision of departmental staff and the oversight of initiatives that advance PT and PTA education, higher education leadership, professionalism, student affairs, and career pathway development. Provides oversight of partnerships with service providers for the Physical Therapist Centralized Application Service (PTCAS) to ensure continuous quality improvement of related products and services. Leads departmental marketing, communication, social media, policy, resource development, and assessment activities. Manages a departmental budget of \$2.4 million.

Notable Contributions

- Served as the founding director of a national centralized application service for PT applicants and programs; and exceeded program participation, performance, and revenue goals every year since launch. PTCAS was featured as a "best practice model" for association work by keynote speaker, Dr. Susan Deusinger, at 2015 APTA Educational Leadership Conference.
- Served as the staff liaison to the Excellence in Physical Therapist Education Task Force that resulted in the approval of a new inter-organizational steering committee in 2016 intended to develop recommendations that advance PT education and produce practitioners that meet the needs of the evolving health care system.
- Collaborated with the American Council of Academic Physical Therapy (ACAPT) on the Admissions Task Force that resulted in the approval of new admission traffic rules for PT applicants and programs.
- Led development of a minority student recruitment video, “Why I Want to Be a Physical Therapist” and a new definition of underrepresented minorities in PT education.
- Partnered with CareerEco to offer virtual student recruitment fairs to prospective students resulting in \$8,000 in new non-dues revenue for the association since first implemented in October 2014.
- Negotiated an agreement with Educational Testing Service (ETS) for the creation of new PTCAS GRE codes resulting in greater efficiencies and subsequent agreements for other CAS that utilize the GRE.
- Worked with staff in the US Bureau of Labor Statistics to update educational and workforce information about physical therapists in the annual Occupational Outlook Handbook.
- Collaborated with the US Department of Education to ensure that the race and ethnicity categories on the PTCAS application and related reports complied with the requirements and expectations for institutions.
- Partnered with Certiphi Screening on development of a new centralized criminal background check service for accepted PT applicants.
- Served as the primary spokesperson for APTA and physical therapy education at meetings of the Federation of Associations of Schools for the Health Professions (FASHP), the National Association of Advisors for the Health Professions (NAAHP), and the American Council of Academic Physical Therapy (ACAPT).
- Organized and delivered educational sessions, including a “Go Green” webinar series, regional WebAdMIT training sessions, and panel presentation on community college courses in health profession admissions.

AMERICAN ASSOCIATION OF COLLEGES OF PHARMACY (AACP) ALEXANDRIA, VIRGINIA

2006-2007 VICE PRESIDENT, STUDENT AFFAIRS
1999-2005 DIRECTOR, PHARMCAS AND STUDENT AFFAIRS

Provided leadership and support directly to the AACP board of directors and member institutions on student affairs, admissions, criminal background checks, diversity, and financial aid issues. Served on the senior staff team, led program planning for multiple meetings, and founded the Pharmacy College Application Service (PharmCAS).

Notable Contributions

- Developed a request for proposal (RFP), negotiated contract, defined system specifications, created business rules, developed marketing plan, recruited schools, and authored documentation for PharmCAS.
- Negotiated revised contractual terms for the Pharmacy College Admission Test (PCAT) with Pearson Education that resulted in a revised test blueprint and a 400 percent increase in royalty payments to the association.
- Successfully advocated on behalf of the association for the inclusion of a new professionalism requirement in the standards adopted by the Accreditation Council of Pharmaceutical Education (ACPE).
- Advised the US Department of Health and Human Services regarding issues related to pharmacy workforce, assisted in successful advocacy efforts to include pharmacists in the Indian Health Service Loan Repayment Program, and served on its Secretary's Award for Innovations in Health Care Planning Committee.
- Chaired the Career Information Clearinghouse (CIC) for the Profession of Physical Therapy and led national student recruitment initiatives, including a national brochure, a PBS documentary, "Pharmacists: Unsung Heroes", and list of benefits for career in pharmacy on prescription bags disseminated nationwide.
- Promoted diversity and cultural competence via web conferences and two national diversity meetings, including the "Cultural Competence in Health Professions Education Institute", the first conference hosted by FASHP.
- Served on the National Health Career Explorers Conference Planning committee and presented during conferences at the National Institutes of Health to 500 pre-health, high school students from across the country.
- Generated content and provided oversight of multiple email distribution lists dedicated to student affairs.
- Served on staff committee that selected a new content management system for the AACP website.

ASSOCIATION OF AMERICAN VETERINARY MEDICAL COLLEGES (AAVMC) WASHINGTON, DC

1998-99 ASSOCIATE DIRECTOR, VETERINARY MEDICAL COLLEGE APPLICATION SERVICE
1995-98 ACADEMIC PROGRAM SPECIALIST

Participated in all aspects of association management and board support. Managed the daily operations of the Veterinary Medical College Application Service (VMCAS) including the training of 10 customer and verification staff members. Collaborated with others to develop application materials, design the operation workflow, and negotiate system changes with vendor. Assisted in a search for new office space in Washington, DC and selection of new furniture purchased for expanded space. Served as primary at liaison between member institutions and AAVMC regarding issues of student recruitment, admissions, accreditation, diversity, and institutional data. Generated annual reports regarding statistical trends within the profession and coordinated the collection of institutional profiles for an annual publication for students. Designed and maintained content and format of the first website for the association.

SHENANDOAH UNIVERSITY, WINCHESTER, VIRGINIA; CHINA; TAIWAN

1993-94 INTERNATIONAL ADMISSIONS COUNSELOR
1992-93 ADMISSIONS COUNSELOR

Conducted student recruitment travel in China, Hong Kong, and Taiwan; assisted with negotiations for an international MBA in Asia; and established initial office procedures for overseas office. Counseled domestic and international students on admissions requirements and degree options. Participated in extensive student recruitment travel in US. Coordinated open houses and audition day events in conjunction with faculty. Counseled undergraduate and graduate students on institutional programs of study. Evaluated transcripts, test scores, and other materials in the admissions review process.

PROFESSIONAL ACTIVITIES

- 2015 **Excellence in Physical Therapist Education Task Force**
American Physical Therapy Association, Primary Staff Liaison
- 2015 **Liaison CAS Summit Planning Committee**
Liaison International, Invited APTA Representative
- 2014-present **Virtual Student Recruitment Fair for DPT Education Programs**
American Physical Therapy Association, APTA Staff Lead
- 2014-present **FASHP Council**
Federation of Associations of Schools for the Health Professions, APTA Liaison Member
- 2014-present **NAAHP Advisory Council**
National Association of Advisors for the Health Professions, Co-chair of Advisory Council
- 2014-present **Targeted Newsletter Staff Work Group**
American Physical Therapy Association, Staff Participant
- 2014 **“Why I Want to Be a Physical Therapist” Video**
American Physical Therapy Association, American Council of Academic Physical Therapy, Staff
- 2013-2015 **ACAPT Admissions Task Force**
American Council of Academic Physical Therapy of APTA, Primary Staff Liaison
- 2013-2016 **ACAPT Diversity Task Force**
American Council of Academic Physical Therapy of APTA, Primary Staff Liaison
- 2010-2013 **Consultant Group on Physical Therapy Workforce**
American Physical Therapy Association, Staff Participant
- 2007-present **PTCAS Work Group** (formerly Advisory Group)
American Physical Therapy Association, Primary Staff Liaison
- 2007 **Cultural Competence in Health Professions Education Institute**
Federation of Association of Schools for the Health Professions, Program Manager
- 2006-present **Interprofessional Professionalism Assessment Tool**
Interprofessional Professionalism Collaborative, APTA Secondary Representative
- 2006-07 **Criminal Background Check Advisory Panel**
American Association of Colleges of Pharmacy, Primary Staff Liaison
- 2006 **Cultural Competence: Closing Gaps and Expanding Access**
American Association of Colleges of Pharmacy, Interim Meeting, Program Manager
- 2005 **Web Cast: “Cultural Competence in Health-Professions Training: Implementation”**
American Association of Colleges of Pharmacy, Program Manager
- 2005 **Web Cast: PharmCAS Policies and Procedures**
American Association of Colleges of Pharmacy, Program Manager and Principle Speaker
- 2004 **Web Cast: Affirmative Action in Health Profession Admissions**
American Association of Colleges of Pharmacy, Program Manager
- 2003 **Colloquium: Building Diversity: Tools for Making a Difference**
Federation of Associations of Schools of Health Professions, Invited Participant
- 2003 **Colloquium: Moving Beyond the Margins: The Role of Health Professions Schools in K-16 Education**
Federation of Associations of Schools of Health Professions, Invited Participant
- 2003-07 **APhA-ASP / AACP Joint Committee on Student Professionalism**
American Association of Colleges of Pharmacy, Staff Liaison
- 2002-07 **Health Professionals for Diversity Coalition**
AACP Representative
- 2001-02 **PharmMed, Inc.** (dissolved in 2002)
Board of Directors, Staff Liaison
- 2000-06 **National Health Career Explorers**
Annual Exposition Planning Committee, Member
- 2000-07 **National Association of Advisors for the Health Professions (NAAHP) Advisory Council**
American Association of Colleges of Pharmacy Representative

- 2000-05 **Secretary's Award for Innovations in Health Care Planning Committee**
Federation of Associations of Schools of Health Professions (FASHP), Member
- 2000-02 **Professional Development Conference for Financial Aid Officers**
Association of American Medical Colleges (AAMC), Planning Committee, Member
- 1999-2000 **Ad Hoc Committee on Affirmative Action and Diversity**
American Association of Colleges of Pharmacy, Staff Liaison
- 1999-07 **Career Information Clearinghouse (CIC) for the Profession of Pharmacy**
American Association of Colleges of Pharmacy Representative, Chair
- 1999-07 **Pharmacy College Application Service (PharmCAS) Advisory Panel**
American Association of Colleges of Pharmacy, Staff Liaison
- 1999-07 **Pharmacy College Admission Test (PCAT) Advisory Panel**
American Association of Colleges of Pharmacy, Staff Liaison
- 1999-07 **Student Services Special Interest Group (SIG)**
American Association of Colleges of Pharmacy, Staff Liaison
- 1999-00 **Ad Hoc Committee on Affirmative Action and Diversity** (disbanded in 2000)
American Association of Colleges of Pharmacy, Staff Liaison
- 1999-07 **Board of Directors**
American Association of Colleges of Pharmacy, Staff Participant
- 1998-present **Centralized Application Services (CAS) Group**
Federation of Associations of Schools for the Health Professions, Member
- 1995-99 **Veterinary Medical College Application Service (VMCAS) Committee**
Association of American Veterinary Medical Colleges, Staff Liaison
- 1995-98 **Comparative Data Committee**
Association of American Veterinary Medical Colleges, Staff Liaison
- 1995-98 **Multicultural Affairs Committee**
Association of American Veterinary Medical Colleges, Staff Liaison

PRESENTATIONS

- 2016 **Advising Minority Students on Journey toward a Physical Therapist Career** (session accepted)
National Association of Advisors for the Health Professions National Conference, Minneapolis
- 2015 **Combined Sections Meeting (CSM), APTA Education Update, Panel Presentation**
American Physical Therapy Association, Indianapolis
- 2015 **Opportunities in Physical Therapy Education, Webinar**
American Physical Therapy Association, Excellence in Physical Therapist Education Task Force
- 2015 **NAAHP Advisory Council Year in Review**
National Association of Advisors for the Health Professions Leadership Retreat
- 2014 **Educational Leadership Conference, Panel Presentation**
American Council of Academic Physical Therapy, Kansas City
- 2014 **Go Green in PTCAS with WebAdMIT, Webinar Series**
American Physical Therapy Association, Organizer and Facilitator
- 2014 **Centralized Application Service Update, Panel Presentation**
National Association of Advisors for the Health Professions National Conference, San Francisco
- 2013 **Educational Leadership Conference Opening Session, Panel Presentation**
American Physical Therapy Association, Portland
- 2013 **Go Green in PTCAS with WebAdMIT**
American Physical Therapy Association, Educational Leadership Conference, Portland

- 2013 **WebAdMIT Regional Training Workshops for PTCAS Users**
American Physical Therapy Association, Facilitator and Program Manager
Boston, Los Angeles, Alexandria, Atlanta, Denver, Chicago
- 2012 **Advising Community College Students for Success in Admissions, Panel Presentation**
National Association of Advisors for the Health Professions National Conference, Baltimore
- 2012 **Educational Leadership Conference Opening Session, Panel Presentation**
American Physical Therapy Association, Greenwich, CT
- 2011 **Managing Your Inbox and How To's: Effective E-mail Communication, Panel Presentation**
American Physical Therapy Association Board of Directors, Crystal City
- 2010 **Centralized Application Service Update, Panel Presentation**
National Association of Advisors for the Health Professions National Conference, Atlanta
- 2008-present **PTCAS Marketing and Training Webinars for Physical Therapist Education Programs**
American Physical Therapy Association
- 2007-present **PTCAS Information Sessions for Physical Therapist Education Programs**
American Physical Therapy Association
Atlanta, GA; Boston, MA; Chapel Hill, NC; Charleston, SC; Chicago, IL; Conway, AR; Dallas, TX; Dayton, OH; Denver, CO; Des Moines, IA; Elon, NC; Fairfax, VA; Glenside, PA; Johnson City, TN; Kansas City, MO; Lexington, KY; Los Angeles, CA; Lynchburg, VA; Madison, WI; Miami, FL; Milwaukee, WI; Minneapolis, MN; Nashville, TN; New York, NY; North Chicago, IL; Okemos, MI; Orlando, FL; Phoenix, AZ; Pittsburgh, PA; Seattle, WA; Portland, OR; Richmond, VA; Salt Lake City, UT; San Antonio, TX; San Diego, CA; San Francisco, CA; Savannah, GA; Springfield, MA; St. Louis, MO; Tampa, FL; Washington, DC; Wichita, KS; Youngstown, OH
- 2007 **Pharmacy: Prescription for a Rewarding Career**
George Mason University, Fairfax, VA
- 2005-2007 **PharmCAS Policies and Procedure, Webinars**
American Association of Colleges of Pharmacy
- 2004 **Centralized Application Services Meeting, Panel Presentation**
Association of Schools of Public Health, Washington, DC
- 2003-2007 **PharmCAS Training and Update Sessions**
American Association of Colleges of Pharmacy
Ann Arbor, MI; Austin, TX; Baltimore, MD; Boston, MA; Brooklyn, NY; Cincinnati, OH; Ft. Lauderdale, FL; Hilo, HI; Houston, TX; Indianapolis, IN; Monroe, LA; Philadelphia, PA; Rootstown, OH; Salt Lake City, UT; San Antonio, TX; San Diego, CA; San Francisco, CA; Washington, DC
- 2000-06 **Educational and Professional Trends in Pharmacy**
National Association of Advisors of Health Professions
Las Vegas, NV; Orlando, FL; Portland, OR; Washington, DC
- 2003, 2004 **Pharmacy: Prescription for a Rewarding Career**
National Health Careers Explorers Exposition, Bethesda, MD
- 2003 **Pharmacy Student Professionalism, Panel Presentation**
National Council of State Pharmacy Association Executives, Arlington, VA
- 2003 **PharmCAS Overview**
Southern Association of Advisors for the Health Professions, Lexington, KY
- 2001 **Impact of a Centralized Application Service, PharmCAS Information Session**
American Association of Colleges of Pharmacy, Washington, DC

- 2000 **Trends in Pharmacy Admissions**, Student Recruitment Workshop
 American Association of Colleges of Pharmacy, San Diego, CA
- 1999 **VMCAS Update**
 Association of American Veterinary Medical Colleges, New Orleans, LA
- 1999 **Changes to the VMCAS Application**
 Association of American Veterinary Medical Colleges, Washington, DC
- 1998 **Educational and Professional Trends in Veterinary Medicine**
 National Association of Advisors for Health Professions, Crystal City, VA
- 1998 **Admission Trends in Veterinary Medicine**
 Association of American Veterinary Medical Colleges, Washington, DC

HONORS

- 1992 Almont Lindsey Award for Excellence in History, Departmental Honor, University of Mary Washington
- 1993 Young Business Person of the Month, Chamber of Commerce, Winchester, Virginia

JOURNALS

- Hammer, Dana, et al. "Defining and measuring construct of interprofessional professionalism." *Journal of Allied Health* 41.2 (2012): 49E-53E.
- "PTCAS Application Trends", *The Advisor: Journal of the National Association of Health Professions Advisors*, 31 (4): 10-17 (2011).
- Ross, Elisabeth J. "Updates from the Health Professions: Pharmacy," *The Advisor: Journal of the National Association of Health Professions Advisors*, 20 (4): 32-33 (2002).
- Ross, Elisabeth J. "Trends in the Pharmacy Profession," *The Advisor: Journal of the National Association of Health Professions Advisors*, 20 (4): 24-25 (2001).
- Ross, Elisabeth J. "Pharmacy College Application Service," *Journal of Pharmacy Practice*, 57(5): (2000).
- Ross, Elisabeth J. "Trends in the Pharmacy Profession", *The Advisor: Journal of the National Association of Health Professions Advisors*, 20(4): 24-25 (2000).
- Crawford, Lester M. and Johnston, Elisabeth C. "The Cost of Veterinary Medical Education", *Journal of the American Veterinary Medical Association*, 209(2): 200-01 (1996).

REPORTS AND ARTICLES

- ACAPT Diversity Task Force Report, 2016
- APTA Excellence in Physical Therapist Education Task Force Report, 2015
- Analysis of Course Prerequisites for Programs in PTCAS, 2014, 2015
- ACAPT Admissions Task Force Report, 2014 and 2015.
- PTCAS Applicant Data Report, 2008-09, 2009-10, 2010-11, 2011-12, 2012-13, 2013-14, 2014-15
- PTCAS Application Instructions, APTA, 2008-09, 2009-10, 2010-11, 2011-12, 2012-13, 2013-14, 2014-15, 2015-16
- PTCAS Manual for Programs, APTA, 2008, 2009, 2010, 2011, 2012.
- Criminal Background Check Report for Physical Therapist Education Programs Report, APTA, 2010.
- Report of the AACCP Criminal Background Check Advisory Panel, AACCP, 2006.
- "June PCAT to Include Essay Component", AACCP News, Volume 36, No. 3, March 2005, Pg 8.
- "PharmCAS Enhances Services for 2005-06", AACCP News, Volume 36, No. 3, March 2005, Pg 7.

"PharmCAS Applications Up Sharply", AACP News, Volume 35, No. 4, April 2004, Pg 4.
PharmCAS Manual for AACP Member Institutions, AACP, 2003, 2004, 2005, 2006, 2007.
PharmCAS Policies and Procedures (internal operations manual), AACP, 2003.
PharmCAS Application Instructions, AACP, 2003, 2004, 2005, 2006, 2007.
"PharmCAS: AACP to Negotiate with AAMC", AACP News, Vol. 31, No. 7, July/Aug 2000. Pg. 1.
"PharmCAS Moves Forward", AACP News, Vol. 31, No. 4, April 2000. Pg. 1-2.
PharmCAS Request for Proposal (RFP): Pharmacy College Application Service, AACP, 2000.
An Analysis of Applications to U.S. Colleges of Veterinary Medicine, AAVMC, 1995-1998.
Comparative Data Report, AAVMC, 1995-1998.

MEMBERSHIPS

American Society of Association Executives (ASAE)
Council on Law in Higher Education (CLHE)
Federation of Associations of Schools for the Health Professions (FASHP)
National Association of Advisors for the Health Professions (NAAHP)

TECHNICAL SKILLS

Expertise in Microsoft Office: Word, Excel, PowerPoint, Access, and Outlook; Dreamweaver (HTML functions); Adobe Products: WebEx, Acrobat Professional, Reader, and Photoshop. Proficient in use of Formsite.com (online survey builder); membership databases, including iMIS and IMPAK; HTML; web content management systems, including CMS and ISSI; and admissions management tools, including WebAdMIT, PTAdMIT and PharmAdMIT.

Curriculum Vitae of Dr. Lynn M Gangone

Vice President, Leadership Programs
American Council on Education
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Washington, DC 20036
Phone: 202-939-9553 (direct line) 202-939- (Winston Chapman, special assistant to the vice president)
Cell: 202-480-7200
lfgangone@acenet.edu lfgangone@gmail.com
Twitter: @LynnMGangone; LinkedIn: Lynn M Gangone

EDUCATION

EdD, MEd Columbia University, New York, New York 1999
Teachers College, Higher and Postsecondary Education, Department of Organization and Leadership.
Dissertation: *"Navigating Turbulence: A Case Study of a Voluntary Higher Education Association."*
Committee: Dr. Sharon A. McDade (chair), Dr. Victoria Marsick, and Dr. Joseph Hankin.

MS, CAS State University of New York at Albany, Albany, New York 1981
Counseling Psychology.

BA The College of New Rochelle, New Rochelle, New York 1979
Political Science, with departmental honors; History minor.

PROFESSIONAL DEVELOPMENT

Harvard University, Institute for Educational Management 2010

Trustee Leadership Development 1995

ACADEMIC AND ADMINISTRATIVE APPOINTMENTS

Vice President, Leadership Programs 2015-present
American Council on Education, Washington, DC

- Senior officer and cabinet member of nation's leading higher education association.
- Leading a team of twenty professionals, oversee the association's portfolio of leadership programs, products and services reaching aspiring and senior leaders throughout all sectors of higher education.
- Raise restricted and unrestricted funds from corporations and foundations to support programs and scholarships for program participants.
- Consult, write, blog, and speak on higher education leadership, women's leadership, advancement of underrepresented men and women, strategic planning, and change management nationally and internationally.
- Create strategic alliances and partnerships with other associations and academic institutions to advance higher education leadership work.

Dean, Colorado Women's College
Clinical Professor, Higher Education, Morgridge College of Education
University of Denver, Denver, CO

2007-2015

- Chief academic, administrative, advancement, and budgetary officer for the university's women's college, responsible for leadership and development of all internal programs as well as external relationships and constituencies; provide strategic direction and oversight for budget development and planning in a decentralized, responsibility-center management structure.
- Raised \$8+ million since 2007 in unrestricted, restricted, and endowed gifts as part of the university's \$500+ million comprehensive campaign; ranked as second highest academic unit within the university raising funds for the endowed scholarship campaign.
- Broader community and branding presence, increased fund raising, and strategic budgeting has resulted in a 45% increase in the college's endowment.
- Serve a compositionally diverse, intergenerational student population, predominantly first-generation, matriculating toward the baccalaureate of arts and an AACSB-accredited baccalaureate of business administration in an engaged learning environment with courses delivered through on ground, on line, and blended formats.
- Within first year, stabilized enrollments; exceeded annual giving goals; converted college certificates to university academic certificates; introduced new academic certificates in conflict resolution and leadership studies; and established leadership studies minor.
- In second year, introduced new academic certificates in entrepreneurship studies, philanthropic studies, community-based research (the first in the nation at the undergraduate level); and secured several six-figure scholarship gifts to the college.
- In third year, increased annual giving by 25%; launched alumnae/fund raising initiatives and foundation for major gifts campaign; established college board of advisors; secured federal funding to launch center for entrepreneurship; and initiated international initiatives in Taiwan, Vietnam, and Canada.
- In fourth year, successfully completed unit restructuring to better align academic and enrollment management functions; created new dual-degree programs; and expanded efforts to create a more inclusive educational community, including the appointment of an associate dean for inclusive excellence.
- In fifth year, elevated the college as a center for women's thought leadership through *Leadership Salons* (http://www.rmpbs.org/womenlead/du_leadership_salons/) and in securing the rights to *Benchmarking Women's Leadership in the United States*; reevaluated enrollment management efforts, resulting in a 90% quarter-to-quarter retention rate; continued emphasis on fund raising for endowed scholarships resulting in several six-figure gifts; launched *Reclaiming the Name* campaign to return to the Colorado Women's College name in 2013.
- In sixth year, the publication of *Benchmarking Women's Leadership in the United States 2013* resulted in local, national, and international media, significantly expanding the college's footprint; reclaiming the college's historic name resulted in a 65% increase in annual fund giving from the previous year; and appointed by the chancellor to the university's Strategic Issues Panel on the Future of Higher Education.
- Current initiatives include increasing endowed and non-endowed five/six-figure and above gifts; broaden blended/hybrid courses offerings, as well as strengthening Daniels College of Business partnership to refine

the BBA program and increase online offerings; working with leadership studies faculty to redesign the minor and move to major status; overseeing the creation and implementation of an early childhood education major slated for fall 2014; and instituted celebratory events for the college's 125th anniversary. Fundraising total for fiscal year 2014 over \$2.75 million.

- Appointed faculty in the MA/PhD program in higher education at the university's Morgridge College of Education, and serve on the leadership studies faculty at the college; teach courses in the leadership studies minor/certificate at the college and in leadership and organizations in the graduate program; and serve on PhD and EdD dissertation committees.

Visiting Professor, Higher Education Administration

Coordinator of the Higher Education Administration Master of Arts Program

2004-2007

Department of Educational Leadership, Higher Education Administration

Graduate School of Education and Human Development

The George Washington University, Washington, DC

- Taught History of Higher Education in the United States, Administration in Higher Education, Power, Leadership, and Education, The Community College, Current Issues in Higher Education, Doctoral Internship/Master's Practicum and Leadership Issues in Higher Education at Foggy Bottom, Loudoun, and Hampton Roads campuses to MA and EdD students.
- Oversaw and directed all higher education department enrollment management efforts, including review of all master's and doctoral candidate applications, maintenance of departmental database, coordination with GSEHD admissions and public relations staffs, and marketing and outreach to all HEA applicants. Master's enrollment increased 100% during my tenure.
- Worked with diverse graduate student population, many of who were nontraditional students.
- Program coordinator and academic advisor to master's students in student affairs, general administration, higher education policy, international higher education, and college teaching and academic leadership; faculty advisor to the Higher Education Student Association.

Consultant, Faculty Member, and Executive Coach

1998-present

LMG Consulting, Denver, CO

- Invited leadership expert to the American Physical Therapy Association, created foundational module in the national online APTA Education Leadership Institute (2011-present).
- Keynote speaker and faculty at several national leadership institutes, including the Women's Leadership Institute (2008-present), HERS Institutes (1998-present), and with South African faculty and higher education administrators from the Western Cape as part of the HERS South Africa program (2000-2003).
- Executive coach and consultant to senior level administrators and faculty, with a particular focus on women's career advancement and leadership development (on-going), including leading seminars on senior leaders and career advancement for the American Council on Education Office of Women in Higher Education (1998-1999).
- Invited team leader for Wellesley College's student activities and leadership programs audit (2010).
- Executive coach and consultant to the University of Maryland Baltimore County ADVANCE grant programs (2006-2007).

- Lobbyist and policy analyst for Maryland Online, a consortium of community colleges and four-year state and independent colleges and universities dedicated to providing online education throughout Maryland (2004-2005).

Vice President and Senior Consultant

2004-2007

Kaludis Consulting, Washington, DC

- Senior administrator (contractual) at national higher education strategic planning consulting firm working with institutions to accentuate core competencies, apply new technologies, reduce costs, build partnerships, and sustain a culture that effectively manages change.
- Areas of expertise included public policy, academic partnerships, institutional advancement, strategic planning, executive team building, and leadership development. Most recent engagement was with mid-sized community college in strategic planning and board development.

Vice President

2000-2004

Maryland Independent College and University Association, Annapolis, MD

- Senior administrator and registered lobbyist representing the presidents and interests of 18 independent colleges and universities to the Maryland legislature, state agencies, and the United States Congress.
- Lobbyist working with independent sector leaders to secure, on average, over \$40 million in statutorily mandated state funds through the Sellinger Aid Program and over \$9 million in the MICUA Capital Program annually.
- Policy analyst and expert on all academic matters including, teacher education and accreditation, P-16 partnerships and initiatives, community college transfer and articulation, institutional and disciplinary accreditation, federal Higher Education Act reauthorization.
- Served as liaison to the Maryland Higher Education Commission, Maryland State Department of Education, Intersegmental Chief Academic Officers, and Associate of Arts in Teaching Oversight Committee; worked closely with counterparts from the University System of Maryland and the Maryland Association of Community Colleges.
- Created, in collaboration with administrators, faculty, and staff from public and private two-and four-year institutions, the nation's first associate of arts in teaching (AAT) degrees.
- Monitored legislation and legislative issues, prepares legislative synopses, bill amendments, and narrative on policy and budget issues; prepared and delivered testimony to state and federal elected officials.
- Conducted institutional research and authored policy papers to advance segment's strategic policy goals and objectives.

Faculty Member and Unit Coordinator

1996-2008

HERS Bryn Mawr Summer Institute for Women in Higher Education Administration, Bryn Mawr, PA

- Taught modules on government relations, institutional advancement, career development, and served as executive coach and advisor to participants.
- Designed curriculum, hired faculty, and worked with faculty to develop course objectives and curriculum for their modules, as well as assisted with admissions, marketing, and outreach.

- From 1998-2006, chaired the Institutional Environment unit, which examined the operational functions within college and university administration, to nearly 1,000 diverse, cross-sector higher education faculty and administrators.

Executive Director and CEO 1995-2000

National Association for Women in Education, Washington, DC

- Chief executive officer of national higher education association; directed paid and volunteer staff; managed both operating budget and endowment; member of the Washington Higher Education Secretariat.
- Engaged in fund raising, marketing, public relations, membership development, new program development, volunteer and board relations; secured largest gift in association history, quadrupled fundraising income through major gifts and corporate solicitations.
- Co-created, with Dr. Adrianna Kezar, *The Institute for Emerging Women Leaders in Higher Education*, which received an American Council on Education (ACE) outstanding leadership program award in 2000; designed curriculum, hired faculty, and worked with faculty to develop course objectives and curriculum for their classes; established and maintained admissions criterion; developed and implemented all marketing related to program advancement; diversified the revenue portfolio and increased national reputation.
- Executive editor of three national publications, including award-winning scholarly journal *Initiatives*.

Vice President for Development and College Relations

1992-1995

Centenary College, Hackettstown, NJ

- Presidential cabinet member, chief institutional advancement officer; directed and managed a staff of 10 in major gifts, annual giving, planned giving, donor relations, corporate and foundation relations, prospect research, information systems, publications, public relations, and special events.
- Initiated initial phases of college's first capital campaign, including prospect research and identification and solicitation of major gift prospects; developed and coordinated a multi-million dollar annual giving campaign, doubling the college's annual campaign revenues in three years.
- Created "The President's Circle," a group of high-capacity alumni targeted as six-figure donors and future board of trustee members. In 2014 this group celebrates its 20th anniversary with significant philanthropic investment and board service.
- Member of college's Middle States accreditation team and strategic planning committee.

Dean of Students

1987-1992

Centenary College, Hackettstown, NJ

- Presidential cabinet member, chief student affairs officer; directed and managed a staff of 18 in residence life, new student programs, counseling, health services, judicial affairs, career development, athletics and recreation, student activities, international student services, and substance abuse and prevention serving 1,000 full and part-time students.
- Responsible for college retention activities and related data collection; assisted Office of Enrollment Management in all facets of college's admissions efforts.
- Designed and implemented scholarship program for student leaders; served as co-curricular and academic advisor to scholarship recipients.

- Service to the institution included the College Curriculum Committee and Academic Review Board; co-chaired trustee-appointed Student Affairs Strategic Planning Task Force.

Director, Staff Development and Training

1986-1987

Rutgers, The State University of New Jersey, New Brunswick, NJ

- Managed and supervised staff, activities, and budget of \$127,000 statewide K-16 educational equity education and training project.
- Authored and received funding for two federally funded grants totaling over \$260,000.
- Researched, developed, and taught more than 100 training and development seminars annually; conceived and produced national award-winning recruitment videotape.

Coordinator, Staff Development and Training

1982-1986

New York State Education Department, Albany, NY

- Researched, developed and taught statewide educational equity training seminars and programs serving over 2,500 K-16 educators annually.
- Aided in securing funding for state and federal grants totaling over \$400,000.
- Served as liaison between State Education Department and local educational agencies.

Project Director/Placement Counselor, 1980-1982

Hudson Valley Community College, Troy, NY

- Administered staff and program activities to recruit, retain, and place students enrolled in nontraditional curriculum areas; developed and facilitated outreach programs for diverse student and community populations; created and presented employment and career development seminars.

SCHOLARSHIP

Publications

Gangone, L. M. & Lennon, T. (2014). Benchmarking women's leadership in academia and beyond. In Madsen, S. and Longman, K. (ed.) *Women and leadership in higher education*. College Park, MD: International Leadership Association. In publication to be released September 2014.

Gangone, L.M. (2009). Higher Education Resource Services: Revolutionary leadership development. In Kezar, A. (Ed.), *Rethinking Leadership in a Complex, Multicultural, and Global Environment: New Concepts and Models for Higher Education*. Sterling, VA: Stylus Publications.

Gangone, L.M. (2008). National Association for Women in Education: An enduring legacy. *Journal About Women in Higher Education*, Volume 1. Washington, D.C., NASPA—Student Affairs Administrators in Higher Education.

Gangone, Lynn M. and Kezar, Adrianna (2000). Meeting the leadership challenges of the 21st Century: An evaluation of a national leadership institute [Electronic Version]. *Initiatives: the Journal of NAWA*, Volume 59:4.

- Gangone, Lynn M. (2000, April). *Navigating turbulence: How nonprofit boards and staff can assess organizational viability*. Refereed conference proceedings, Innovation, Change, and Continuity in Nonprofit Organization Conference, Midwest Center for Nonprofit Leadership, Kansas City, Missouri.
- Gangone, Lynn M. (Ed.). (1999). *Initiatives on mentoring*. Washington, D.C.: National Association for Women in Education.
- Gangone, Lynn M. (1988) Expanding career options: Strategies to recruit and retain non-traditional students. In Carelli, A. (Ed.) *Sex equity in education: A book of readings and strategies* (pp. 271-280). Springfield, IL: Charles C. Thomas Publishers.
- Gangone, Lynn M. (Producer/Creator). (1987). *Mythbusters*. [Videotape]. (Available from the Office of Television and Radio, Rutgers University, rutv@ur.rutgers.edu). Award winner, 1998 National Association of State Education Department Information Officers Award of Excellence.

Other Publications, Research Team Participation, and Manuscripts in Preparation

- Gangone, L.M. (2015). Reflections on advancing women in higher education. *The Presidency*
- Gangone, L.M. (2013, October 10). *Is discrimination the reason why more women are not in leadership roles?* <http://shrivereport.org/is-the-discrimination-the-reason-there-arent-more-women-in-leadership-roles-lynn-gangone/>
- Research team member, Women's Cross-Sector Leadership Project Phase 1-*An examination of the factors that influence success or failure in the university presidency*; collaborators include researchers from HERS, the Center for Creative Leadership, and University of Colorado-Colorado Springs.
- Research team member and reviewer. Colorado Women's College (2013). *Benchmarking Women's Leadership in the United States 2013*. Denver, CO: Colorado Women's College.
- Gangone, L.M. (2012, April 16). Is it a choice? [Web log comment]. Retrieved from <http://wisakc.com/2012/04/16/is-it-a-choice-by-dr-lynn-m-gangone/>
- Gangone, L.M. *Shaping the conversation for women's advancement: NAWA's grassroots advocacy 1969-1979*. Journal article manuscript.
- Gangone, Lynn M. *Reflecting on the History of a Pioneering Student Affairs Association*. Journal article manuscript.
- Primary researcher (1987). Sanders, Jo (1988). *Staying poor: How the Job Training Partnership Act affects women*. Metuchen, NJ: Scarecrow Press.

Recent Media, Television, and Video

- TEDxMileHigh (2014, June 14) "Shatter the Ice" <https://www.youtube.com/watch?v=JBLc4EkI3BA>
- Rocky Mountain PBS, *Colorado State of Mind* (2014, February 21). [Video File] "Women's Pay Inequality," Invited guest. Retrieved from <http://video.rmpbs.org/video/2365186583/>
- Rocky Mountain PBS, *Colorado "Makers"* (2014, January). [Video File] Retrieved from <http://www.youtube.com/watch?v=XQF1ysmko3E>

Gangone, L.M. (2012, May). *Embodying inclusive action*. [Video File] TEDxDUSalon. Retrieved from <http://www.youtube.com/watch?v=sZCWZjxIPH8>

Rocky Mountain PBS *Colorado State of Mind/Colorado Quarterly* (2011, February). [Video File] “A Debate on the Education of Girls and Boys,” invited panelist. Retrieved from video.rmpbs.org/video/1771981476/

Dissertation Committees

Benedictine University

Constance St. Germain. *Women Disrupted; Female Academic Leaders' Perspective and Experiences in For-Profit Online Education*. EdD dissertation.

The Catholic University of America

Tabitha S. Harper. (2014). *Investigating Relationships between the Subscales of the Mayer-Salovey-Caruso Emotional Intelligence Test and the General Ability Measure for Adults General Intelligence Test*. PhD dissertation.

University of Denver

Danielle Sulick (2011). *Persisting to Graduation: A Grounded Theory Exploration of Nontraditional Undergraduate Women's Enrollment*. PhD dissertation.

Maureen Silva (2010). *Women Leaders Resolving Conflict in Higher Education: A Feminist Epistemological Perspective*. PhD dissertation.

The George Washington University

Lindsay Mathers Addington (2011). *Students' Preferences for Information Sources during the Undergraduate College Search Process: The Influence of Technology*. EdD dissertation.

Brian Sponsler (2011). *State adoption of undocumented student tuition policy: An event history analysis*. EdD dissertation.

Ruth Mensel (2010). *Organizational study of the Executive Leadership Program in Academic Medicine (ELAM)*. EdD dissertation.

Trenace Richardson (2009). *The role of spirituality in the leadership styles of African-American women president*. EdD dissertation.

Nicole Roop (2007). *Exploring the existence of a subculture of student leaders*. EdD dissertation.

Erika Henderson (2007). *The relationship between service learning and self-reported attitudes of civic responsibility for community college students*. EdD dissertation.

Fil J. Arenas (2005). *Military distance education: The Navy college program for afloat college education (NCPACE) continuing effectiveness evaluation*. EdD dissertation.

Rhonda Sturgis (2005). *Team relationships within institutional advancement: Board of trustees, president, and vice president of institutional advancement*. EdD dissertation.

John Yaeger (2005). *Congressional influence on National Defense University*. EdD dissertation.

Other institutions

Heath Boice-Pardee (2002). Educational philosophy as philosophy for student affairs: An examination of colleges and universities in New Jersey. Rutgers, the State University of New Jersey. EdD dissertation.

Scholarly Paper Presentations

(2006, November) *Shaping the conversation: The National Association for Women in Education 1970-1979*. Refereed paper presentation, Association for the Study of Higher Education, Anaheim, CA.

(2006, October) *The historical role of women's advocacy groups in higher education: A study of the National Association of Women Deans, Administrators, and Counselors*. Refereed paper presentation, History of Education Society International Conference, Ottawa, Canada.

(2000, April) *Navigating turbulence: How nonprofit boards and staff can assess organizational viability*. Refereed paper presentation, Innovation, Change, and Continuity in Nonprofit Organization Conference, Midwest Center for Nonprofit Leadership, Kansas City, Missouri.

Selected Invited Speeches and Presentations

Invited inaugural faculty member, Women's Leadership Forum, Academic Leadership Center, King Fahd University of Petroleum & Minerals, Saudi Arabia, February 2016.

"Is It Really My Fault? Confronting the Myths Surrounding Women's Advancement," invited keynote speaker, Association of American Colleges and Universities, January 2016.

"Thought Leader Forum," invited leadership expert, American Society for Healthcare Human Resources Administration (ASHHRA) and TIAA-CREF, July 2014.

"Serving the Post-traditional Student," invited speaker, Community College of Aurora Student Affairs Retreat, April 2014.

"Benchmarking Women's Leadership in the United States," invited speaker, The Leadership Investment, January 2014.

"Assessment and Persistence of the Post-traditional Student." invited opening keynote speaker, NASPA National Assessment and Persistence Conference, June 2013.

"Fierce with Reality," invited Commencement speaker, University of Denver summer commencement, August 2012.

"Two Steps Forward, Two Steps Back," invited panelist, *Women Yesterday, Today, and Tomorrow*, Rocky Mountain PBS and Denver Center Theater Company, January 2012.

"Economic Development and Women's Entrepreneurship," invited expert with panel moderator House Minority Leader Nancy Pelosi, April 2011.

"Why Women Still Matter," invited keynote speaker, *National Women's Studies Association Women's Center Caucus*, November 2010.

"The Power of Philanthropy," invited keynote speaker, *United Way of Larimer County WomenGive* luncheon, February 2010.

"Themes of Personal Leadership Development," invited keynote speaker, *Colorado Women's Chamber of Commerce*, February 2010.

- “Reframing Power and Influence—and Claiming It,” invited presenter, *Women’s Leadership Institute*, December 2008-2012.
- “Leadership in Times of Crisis,” invited keynote speaker, *HERS Denver*, August 2009.
- “Leadership Development in Higher Education—the Responsibility,” invited keynote speaker, *Midwest Women’s Leadership Institute*, June 2009 and 2010.
- “Persistence, Openness, Failure, and Reflection,” invited keynote speaker, *Hawai’i American Council on Education Network Oahu Chapter*, January 2009.
- “Symbolic Leadership—Understanding and Applying the Symbolic Frame to Leadership,” invited presentation to deans, *Utah State University*, August 2007.
- “Contemporary Challenges of Higher Education—Overview of U.S. Higher Education,” invited keynote speaker, *Phelps Stokes Fund*, October 2006.
- “Reframing Organizations: Effective Leadership in Higher Education,” *HERS Bryn Mawr Summer Institute*, July 2006.
- “Changing State and Institutional Transfer/Articulation Policy,” invited keynote speaker, *Association for the Study of Higher Education*, Graduate Student Public Policy Institute, November 2005.
- “Government Relations: It’s All About Politics,” *HERS Bryn Mawr Summer Institute*, July 2004.
- “Lessons in Leadership,” *American Association of University Women National Leadership Conference*, June 2004.
- “Equity in Education,” *Leadership Maryland Class of 2002*, April 2004.
- “Career and Life Planning,” *National Institute of Corrections Executive Women’s Leadership Development Program*, September 2003.
- “Change, Transitions, and All That Jazz,” *National Conference for College Women Student Leaders*, June 2003.
- “Principles of Fund Raising and Capital Campaigns,” *HERS Bryn Mawr Summer Institute*, July 2003.
- “Career and Life Transitions,” invited keynote speech and workshop presentation, *Appalachian College Consortium*, April 2002.
- “Mentoring,” invited keynote speech and workshop presentation, *Southeast Missouri State University*, November 2000.
- “Associations: What They Are and What They Do,” presentation to *The George Washington University Department of Educational Leadership*, Meet the Leaders series, November 2000.
- “Tending the Garden of Leadership,” invited keynote speech, *Virginia Tech College of Human Development and Education*, October 2000.
- National Teleconference on Women in Higher Education* invited closing panel participant, March 2000.

HONORS/AWARDS

- Rocky Mountain PBS “Makers” <http://www.youtube.com/watch?v=XQF1ysmko3E>, 2014
- Colorado Black Women for Political Action “Women Making History” Award, 2013
- Colorado Women’s Chamber of Commerce “Twenty-Five Most Powerful Women in Denver” Award, 2013
- Woman of Distinction, Girl Scouts of Colorado, 2008
- Outstanding Achievement in Multicultural Excellence, Center for Multicultural Excellence, University of Denver, 2008
- Diamond Honoree for Service to Higher Education, American College Personnel Association, 2001
- Ursula Laurus Distinguished Service Citation, The College of New Rochelle, 1999
- New York State Sex Equity Award, 1986
- Who’s Who Among Students in American Colleges and Universities, 1975, as well as various state and national Who’s Who citations
- Cardinal's Award (highest award given to a graduating senior), The College of New Rochelle, 1975
- Kappa Gamma Pi Honor Society

SERVICE-UNIVERSITY OF DENVER

- Member, Chancellor’s Strategic Planning Steering Committee, 2014.
- Chair, Daniels College of Business Dean’s Search Committee, 2013-2014.
- Member, Strategic Issues Panel on the Future of Higher Education, 2013-2014.
- Member, University of Denver ASCEND Campaign Steering Committee, 2011-present.
- Member, Renew DU Steering Committee, 2012-present.
- Co-Chair, Women’s Leadership Council, 2010-2012.
- Women’s Coalition, 2012-2013.
- Member, Search Committee, Vice Chancellor for Communications, 2010.
- Member, Morgridge College of Education Structural Review Committee, 2009.
- Co-Chair, Criterion Five Subcommittee and member, Chancellor’s Committee on the Higher Learning Commission Accreditation, 2008-2010.
- Co-Chair, Web Subcommittee and member, University Technology Council, 2008.
- Member, Search Committee, Daniels College of Business Dean’s Search, 2008.

VOLUNTEERISM AND PROFESSIONAL AFFILIATIONS

Board of Directors and Vice Chair, Fund Development Committee, Girl Scouts of the United States of America 2015-present.

Board of Directors and Vice Chair of the Board, Public Service Credit Union, 2010-2014; board secretary, board policy sub-committee chair (2010-12), and member of the executive committee.

Board of Directors and Invited Member, International Women's Forum, Colorado Chapter (2011-present); president (2014), president-elect (2013), and vice president, programs (2012).

Board of Directors, HERS (Higher Education Resource Services), 2002-present; treasurer and chair, finance and audit committee (2006-2008); chair, nominations and governance committee (2010-2012), *ex officio* representative for the University of Denver chancellor (2012-present).

"Ask the Expert," TIAA-CREF Financial Services, Women's Engagement Center (online), 2014

TEDxMileHigh Women emcee and advisory board member, 2013-present

Advisory Board, NASPA Research and Policy Institute (RPI), 2013-present

Denver Metro Chamber of Commerce Leadership Exchange (LEX) Delegate, 2012 (Austin, TX) and 2011 (Boston, MA)

Advisory Board, Women and Girls Lead, Rocky Mountain PBS, 2012-present.

Colorado Girl Scouts Women of Distinction Selection Committee, 2009-2013.

Advisory Board, Denver Foundation, Civic and Education Committee, 2011-2012.

Board of Directors, Colorado Women's Chamber of Commerce, 2008-2010.

National Advisory Board, Campus Women Lead: the National Initiative for Women in Higher Education, 2001-2010.

Faculty Advisor, The George Washington University Higher Education Student Association, 2005-2007.

Peer Reviewer, Fulbright Senior Specialists Program, 2004-2006.

Committee member, 20th Annual Excellence Awards, The George Washington University, 2005.

Board of Directors, The Maryland Network: Women in Maryland Higher Education, 2000-2006; Board Co-Chair 2003-2005.

Board of Directors, The College of New Rochelle Alumnae/i Association, 1998-2003; vice president, 2000-2003.

Board of Directors, Girl Scouts of Central Maryland, 2003.

Volunteer chair, Annual Fund Campaign, The College of New Rochelle, 2000-2003.

Class alumnae president, The College of New Rochelle, 1995-1999; Class fund agent, The College of New Rochelle, 1999-2003.

Board of Directors, Women Administrators in Higher Education, 1996-2000, co-chair 1999-2000.

Board of Directors, New Jersey ACE-NIP, 1990-1995.

Dr. Lynn M Gangone

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Member, American Association of University Women

Member, Association for the Study of Higher Education

Member, Council for the Advancement and Support of Education

Member, History of Education Society

Member, International Leadership Association

References available upon request.

CURRICULUM VITAE
Revised June 2014

NAME: Nancy K. Hall, Ph.D., College of Medicine, Emeritus
Associate Dean for Academic Affairs
David Ross Boyd Professor Emeritus
Adjunct Professor of Dermatology
Adjunct Professor of Microbiology and Immunology
Adjunct Professor - College of Dentistry
Adjunct Professor - College of Allied Health
Adjunct Professor – Honors College
Adjunct Professor – Advanced Programs – Human Relations
University of Oklahoma Health Sciences Center

DATE OF BIRTH: 7 July 1947

CITIZENSHIP: United States (Born in Washington, D.C.)
Department of the Interior, BIA
Cherokee Nation of Oklahoma (Registry NO. CO124737)

EDUCATION:

1976 - 1978 Post-doctoral Fellow, National Institutes of Health, National Institute of Allergy and Infectious Diseases.
1976 Doctor of Philosophy. Veterinary Pathology, Kansas State University.
1971 Master of Science. Medical Mycology, University of Oklahoma.
1970 Microbiology, Industrial Microbiology, University of California, Davis, California.
1969 - 1970 Marine Microbiology, University of Hawaii. National Science Foundation Fellowship.
1967 - 1969 Bachelor of Arts. Medical Microbiology. Stanford University.
1965 - 1967 Medical Microbiology, University of Arizona.
1969 Marine Microbiologist, *Te Vega* Oceanographic Expedition XXI.

FELLOWSHIPS:

1976 Postdoctoral Fellow, National Institutes of Allergy and Infectious Disease, University of Oklahoma.
1971 Predoctoral Fellow, National Defense Education Act, University of Oklahoma.
1970 Predoctoral Fellow, National Institutes of Health, University of California, Davis, California.
1969 Predoctoral Fellow, National Science Foundation, University of Hawaii.

PROFESSIONAL EXPERIENCE:

2009 - 2013 Adjunct Professor – Human Relations
2010 – 2013 Professor – Educational Leadership Institute, APTA
2008 Appointment David Ross Boyd Professor Emeritus
2001 – 2008 Associate Dean for Academic Affairs
2000 – 2001 Interim Chair, Department of Pathology
2000 - 2001 Service Chief, Department of Pathology
1996 Joseph and Rose Kennedy Institute for Bioethics
1994 - 1995 Distinguished Visiting Professor
United States Air Force Academy

1999 - Professor of Pathology
 Adjunct Associate Professor of Microbiology and Immunology
 Adjunct Associate Professor of Dermatology
 Adjunct Associate Professor/College of Dentistry
 University of Oklahoma Health Sciences Center

1978 - 1999 Associate Professor of Pathology
 Adjunct Associate Professor of Microbiology and Immunology
 Adjunct Associate Professor of Dermatology
 Adjunct Associate Professor/College of Dentistry
 University of Oklahoma Health Sciences Center

1989 – 2008 Deputy Director of Faculty Leadership Program - Education
 The University of Oklahoma Health Sciences Center

1984 - 1995 Assistant Dean for Admissions
 1986 – 1995 Associate Dean for Student Affairs
 1996 – 2001 Associate Dean for Admissions and Medical Education

1973 Instructor, Veterinary Diagnostic Laboratory
 Kansas State University.

1972 Veterinary Diagnostician - Virologist, College of Veterinary Medicine,
 Kansas State University.

1971 Research Associate, Department of Biochemistry, Kansas State
 University.

SOCIETY MEMBERSHIPS:

(Joining Dates)

1974 American Society for Microbiologists
 1970 Medical Mycological Society of the Americas
 1971 Phi Sigma - Oklahoma Chapter
 1976 Sigma Xi
 1976 International Society for Human and Animal Mycology
 1976 American Association of Veterinary Laboratory Diagnosticians
 1977 Mycological Society of America
 1979 American Lung Association
 1980 Society for Experimental Biology and Medicine
 1981 American Association for the Advancement of Science
 1984 American Association of Pathologists
 1984 Oklahoma Academy of Science
 1984 Society for Experimental Biology and Medicine
 1985 Association of American Medical Colleges
 1986 Research in Medical Education
 1998 Oklahoma Board of Medicolegal Investigations
 1998 International Association of Medical Science Educators
 2000 Association of MD/PhD Directors
 2002 Fellow of the American Academy of Microbiology
 2003 Group on Research, Education and Technology (GREAT) – Executive
 Committee

TEACHING:

1978 - 85 Director, Academic Programs, Department of Pathology, University of
 Oklahoma, College of Medicine.

1985 - 1996 Associate Dean. Clinical sciences advising and academic advancement.

1997 – 2008 Associate Dean. Advising for 600 medical students.

2008 - 2014 Adjunct Faculty – Human Relations

COLLEGE OF MEDICINE (MEDICAL STUDENTS)

1978 - 1983	Course Director, Systemic Pathology and Laboratory Medicine; University of Oklahoma College of Medicine.
1983 - 1989	Lecturer. Respiratory System Coordinator. Systemic Pathology and Laboratory Medicine.
1979 - 1984	Course Co Director, Etiology and Pathogenesis of Disease. Interdisciplinary course with Department of Microbiology and Immunology.
1984 - 1989	Lecturer. General Pathology. Etiology and Pathogenesis of Disease.
1978 - 1985	Course Director. Special Problems in Pathology.
1978 - 1985	Course Director and Coordinator. All Clinical Electives Programs in Pathology: Anatomic Pathology, Clinical Pathology, Forensic Pathology, Neuropathology, Pediatric Pathology, Preceptorship (Baptist Medical Center), Preceptorship (Presbyterian Hospital), off campus electives.
1978 - 1983	Lecturer. Department of Medicine Residency Program. Histopathology of Fungal Infections.
1978 - 1982	Lecturer. Clinical Pathology Conferences. Immunodeficiencies.
1996 - 2005	Course Director. Professional Ethics and Professionalism. Bioethics.
1997 - 2003	Course Director. Scientific Integrity. Graduate Course in Ethics.
2004 - 2008	Course Director. Integration of Medical Problem Solving. First and second year medical school.
2005 - 2008	Course Director. Patients, Physicians and Society: Clinical Ethics.

COLLEGE OF MEDICINE (PHYSICIAN'S ASSOCIATE PROGRAM)

1979 - 1984	Lecturer. Core Pathology. University of Oklahoma College of Medicine Physician's Associate Program.
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COLLEGE OF ALLIED HEALTH

1978 - 1980	Lecturer. General and Systemic Pathology. University of Oklahoma College of Allied Health.
1983 - 1985	Course Director, General and Systemic Pathology. University of Oklahoma College of Allied Health.
1985 - 1995	Lecturer. Core Pathology. University of Oklahoma College of Allied Health.
1999 - 2002	Course co-Director. Allied Health Ethics for Professional Doctoral Candidates. University of Oklahoma College of Allied Health.
2000 - 2008	Major professor or committee member for Doctoral Committees.

COLLEGE OF PHARMACY

1978 - 1980	Lecturer. General and Systemic Pathology. University of Oklahoma College of Pharmacy.
1983 - 1985	Course Director. General and Systemic Pathology. University of Oklahoma College of Pharmacy.
1986 - 1990	Lecturer. Core Pathology. University of Oklahoma College of Pharmacy.

COLLEGE OF DENTISTRY

1982 - 1983	Course Coordinator, General Pathology; University of Oklahoma College of Dentistry.
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GRADUATE COLLEGE

1979 - 1983 Course Director. Histochochemistry. Interdisciplinary with Department of Anatomy. Dr. Robert Coalson.

1979 - 1983 Journal Club. Basic Science Departments, College of Medicine and Graduate College.

1979 - 1982 Lecturer. Electron Microscopy.

1979 - 1980 Lecturer. Molecular Pathology.

1979 - 1982 Lecturer. Research techniques.

1979 - 1986 Major professor or committee member. 23 students for Ph.D. and/or Master's degrees.

1997 - 2000 Coordinator Integrity in Scientific Research. Graduate College.

2000 - 2003 Course Co-Director. Allied Health Ethics and Leadership.

COLLEGE OF ARTS AND SCIENCES (UNDERGRADUATE STUDENTS)

1979 - 1982 Course Director. Immunology. University of Oklahoma College of Arts and Sciences, Department of Botany and Microbiology.

1980 - 1983 Course Director. Pathology. University of Oklahoma College of Arts and Sciences, Department of Botany and Microbiology.

1997 - 2008 Guest Lecturer. Bioethics. Honors Program

COLLEGE OF CONTINUING EDUCATION – ADVANCED PROGRAMS

2009 Human Relations – Leadership in Organizations (Heidelberg, Germany)

2010 Human Relations – Independent Study – Ethics in Organizations

2011 Human Relations – Creative Problem Solving (Naples, Italy)

2013 Human Relations – Creative Problem Solving (Wiesbaden, Germany)

2013 Human Relations – Creative Problem Solving (Norman, Oklahoma)

UNITED STATES AIR FORCE ACADEMY (UNDERGRADUATE STUDENTS)

1994 - 1995 Lecturer. Core Biology.

1994 - 1995 Course Director. Senior seminar.

1994 - 1995 Course Director. Immunology/Virology.

1994 - 1995 Biology 499. Senior research mentor

OKLAHOMA STATE REGENTS FOR HIGHER EDUCATION - SUMMER PROGRAMS (HIGH SCHOOL STUDENTS)

1990 - 1999 Summer Academy for Health Sciences Professions. Courses include Orientation to health-related fields, career counseling, general pathology, anatomy with dissection, computer aided instruction, genetics, bioethics, and health policy. 622 participants.

AMERICAN BOARD OF PHYSICAL THERAPY and AMERICAN PHYSICAL THERAPY ASSOCIATION

2010 – 2015 Education Leadership Institute – ABPTRFE Credentialed Fellowship Organizational Leadership

UNIVERSITY OF OKLAHOMA HEALTH SCIENCES CENTER - FACULTY INSTRUCTION

1990 - 2008 Seminar Program - Junior Faculty.

1990 - 1994 Symposium Program – Midlevel Faculty

1990 – 1995 Colloquia - Senior Faculty. Topics include Academic Corporate Culture, The Reflective Practitioner, Successful Mentoring, Negotiation, Building Advancement Portfolios.

1995 – 1999 Summer Institute for Faculty Leadership. Intensive, eight-day program for nationally based, minority junior faculty.

FACILITATION

September, 2009 Strategic Planning Leadership Conference. College of Medicine
 June, 2010 Leadership Conference. Council of Deans. Provost Office OUHSC.
 Sept 24-25, 2010 Departmental Visioning, Department of Surgery. College of Medicine
 May 9, 2011 Strategic Planning. Department of Surgery. College of Medicine.
 May 10, 2013 Education and Clinical Research. Department of Surgery. College of Medicine
 May 28-30, 2013 Strategic Planning. Department of Rehabilitation Sciences. College of Allied Health
 October 24, 2013 Oklahoma Health Center Foundation Visioning
 January, 2014 Oklahoma School of Science and Mathematics – Curriculum Planning
 May, 2014 Oklahoma School of Science and Mathematics – Course Design and Implementation

RELATED TEACHING ACTIVITIES:

Coordinator, Graduate Student Admissions and Advisory Meetings
 Curriculum Review Committee, College of Allied Health
 Graduate Faculty Executive Committee
 Chairperson, Graduate Education Committee, Department of Pathology
 Chair, Academic Program Council - OUHSC

SUMMARY OF STUDENT INSTRUCTION

YEARS	LEVEL	STUDENTS
10	HIGH SCHOOL	682
27	UNDERGRADUATE	520
25	GRADUATE	230
27	MEDICAL	4458
25	HEALTH PROFESSIONS	2897
4	ADVANCED PROGRAMS	84

SUMMARY OF FACULTY LEADERSHIP INSTRUCTION

Program	Participants	Minority Faculty
Institute	64	64
Seminar	290	28
Symposium	79	22
Colloquia	80	11

GRANTS AWARDED:

1976 - 1978 Evaluation of the Immune Response in Blastomycosis. DHEW National Institute of Allergy and Infectious Diseases. No. 1 F32 AIO5177. Principal Investigator.

1979 - 1983 Development of a model for the study of pulmonary infections in animals with selective inhibition of alveolar macrophages. Component VA Research/Development Program. Principal Investigator Everett R. Rhoades. Nancy K. Hall, Immunology consultant.

- 1979 Interaction of *Blastomyces dermatitidis* and alveolar macrophages at the electron microscopic level. College of Medicine Research Support Grant.
- 1979 - 1982 Immunology of Cryptococcosis. DHEW National Institute of Allergy and Infectious Diseases. No. AI16081. Rebecca Blackstock and Nancy K. Hall.
- 1982 - 1983 Modification of macrophage tumoricidal activity by *Cryptococcus neoformans*. OU Associates Basic and Clinical Research Funds. No. A007170. N. K. Hall
- 1984 - 1987 Cunningham, Madeline. National Institutes of Health. Immunology similarities: Human heart and Streptococci. Nancy K. Hall, Co-investigator.
- 1984 - 1985 Consultant: Nancy K. Hall. Cross-reactivity of monoclonal antibodies to streptococci and human tissue. M. Cunningham, PI. Oklahoma Affiliate. American Heart Association.
- 1985 - 1988 Blackstock, R. and Hall, N.K. National Institutes of Health. Regulation of Macrophage Phagocytosis.
- 1990 Hall, N.K. Summer Academy for Medical Sciences. Oklahoma State Regents for Higher Education. \$159,510.
- 1991 Hall, N.K. and C. A. Sullivan. Summer Academy for Health Sciences. Oklahoma State Regents for Higher Education. \$230,000.
- 1992 Hall, N.K. and C. A. Sullivan. Summer Academy for Health Sciences Professions. Oklahoma State Regents for Higher Education. \$169,600.
- 1993 Hall, N.K. and C. A. Sullivan. Summer Academy for Health Sciences Professions. Oklahoma State Regents for Higher Education. \$199,360.
- 1994 Hall, N.K. and C. A. Sullivan. Summer Academy for Health Sciences Professions. Oklahoma State Regents for Higher Education. \$161,396.
- 1995 Hall, N.K., C. A. Sullivan, and M. Morris. Summer Academy for Health Sciences Professions. Oklahoma State Regents for Higher Education. \$143,000
- 1996 Hall, N.K., C. A. Sullivan, and M. Morris. Summer Academy for Health Sciences Professions. Oklahoma State Regents for Higher Education. \$133,200.
- 1996 - 1998 Hall, N.K. Minority Teacher /High School Student Enrichment Program. National Institutes for Health – National Center for Research Resources. \$33,800.
- 1998 Hall, N.K., C. A. Sullivan, M. M. Bennett, A. Cavallo. Summer Academy for Health Sciences Professions. Oklahoma State Regents for Higher Education. \$157,963.

- 1998 Hall, N.K., C.A. Sullivan, M.M. Bennett. Summer Academy for Health Sciences Professions. Oklahoma State Regents for Higher Education. \$143,807.
- 1993 - 1999 Hall, N.K. Short-Term Research/Training for Minority Students (STaRT). National Heart, Lung and Blood Institute. \$161,862.
- 2000 - 2010 Hall, N.K. MD/PhD Training Program. Presbyterian Health Foundation. \$5 million.
- 2001 - 2006 Hall, N.K. Honors Research Training Program. Presbyterian Health Foundation. \$37,200/yr.

BOOKS/CHAPTERS:

Larsh, Howard W. and Nancy K. Hall, 1976. Opportunistic Fungi. Medical Mycology Section. CRC volume in Clinical Microbiology.

Larsh, Howard W., Nancy K. Hall and Ronald L. Schlitzer. 1978. Dynamics of cryptococcal infection by the airborne route. Proceedings of the Fourth International Conference on the Mycoses. Pan American Health Organization.

Larsh, Howard W., and Nancy K. Hall, 1981. *Histoplasma capsulatum*. International Textbook of Medicine. Vol II. Medical Microbiology and Infectious Diseases. W. B. Saunders, Co. Edited by A. J. Braude. pp. 654-658.

Hall, Nancy K. and H. W. Larsh. 1983. Epidemiology of the Mycoses. The Pathogenic Fungi: Biology, Pathogenicity and Detection. Part II. Volume 1. Chapter 10.

Holliman, J. H. and N. K. Hall. 1991. Oklahoma Notes - Pathology. Springer-Verlag. Second and Third Editions.

PUBLICATIONS:

Deighton, Florence, Nancy K. Hall, Rebecca A. Cox, and H. W. Larsh. *In vivo* and *in vitro* cell mediated immune responses to a cell wall antigen of *Blastomyces dermatitidis*. Infection and Immunity. 15:429-435. 1977.

Karaoui, Riad, Nancy K. Hall and Howard W. Larsh. Role of macrophages in immunity and pathogenesis of experimental cryptococcosis induced by the airborne route - Part I: Pathogenesis and acquired immunity of *Cryptococcus neoformans*. Mykosen. 20(10):409-414. 1977.

Karaoui, Riad, Nancy K. Hall and Howard W. Larsh. Role of macrophages in immunity and pathogenesis of experimental cryptococcosis induced by the airborne route - Part II: Phagocytosis and intracellular fate of *Cryptococcus neoformans*. Mykosen. 20(10):414-422. 1977.

Hall, Nancy K., Florence Deighton and Howard W. Larsh. Use of an alkali soluble water-soluble extract of *Blastomyces dermatitidis* yeast phase cell wall (B-ASWS) and isoelectrically focused components in peripheral lymphocyte transformation. Infection and Immunity. 19:411-415. 1978.

Hall, Nancy K. and Harish C. Minocha. Enhancement of infectious bovine rhinotracheitis virus replication with corticosterone. International Journal of Veterinary Microbiology. 2:109-119. 1977.

- Hubbard, J.C., Nancy K. Hall and Howard W. Larsh. *In vitro* and *in vivo* activity of a synthetic halogenated quinoline against *Cryptococcus neoformans*. Antimicrobial Agents and Chemotherapy. 14:922-923. 1978.
- Hollick, G.E., Nancy K. Hall, and Howard W. Larsh. Chemical and serological comparison of two antigen extracts of *Thermoactinomyces candidus*. Mykosen. 22:49-59. 1979.
- Fromtling, R.A., R. Blackstock, N.K. Hall, and G.S. Bulmer. Kinetics of lymphocyte transformation of mice immunized with viable avirulent forms of *Cryptococcus neoformans*. Infection and Immunity. 24:449-453. 1979.
- Fromtling, R.A., R. Blackstock, N.K. Hall and G.S. Bulmer. Immunization of mice with an avirulent pseudohyphal form of *Cryptococcus neoformans*. Mycopathologia. 68:179-181. 1979.
- Coalson, J. J., L. T. Archer, and Nancy K. Hall. Prolonged shock in the monkey following live *E. coli* organism infusion. Circulatory Shock. 6:343-355. 1979.
- Deighton, Florence, N. K. Hall, and Howard W. Larsh. Fungicidal effects of merthiolate versus formaldehyde on pathogenic yeasts. Journal of Clinical Microbiology. 10:144-146. 1979.
- Hollick, G. E., N. K. Hall, and Howard W. Larsh. Peripheral and alveolar responses in guinea pigs to an aerosol exposure of *Thermoactinomyces candidus* spores. Mykosen. 23(3):120-129. 1980.
- Hall, Nancy K. and R. Blackstock. Production of Specific Antibody to *Cryptococcus neoformans* by hybridomas *in vitro*. Sabouraudia. 19:157-160. 1981.
- Robinson, B. E., N. K. Hall, G. S. Bulmer and R. Blackstock. Suppression of responses to cryptococcal antigen in murine cryptococcosis. Mycopathologia. 80:157-163. 1982.
- Blackstock, R. and N. K. Hall. Immunosuppression by avirulent, pseudohyphal forms of *Cryptococcus neoformans*. Mycopathologia. 80:95-99. 1982.
- Morgan, M.A., R. Blackstock, and N. K. Hall. Modification of macrophage phagocytosis in murine cryptococcosis. Infection and Immunity. 40:493-500. 1983.
- Blackstock, R. and N. K. Hall. Non-specific immune suppression by *Cryptococcus neoformans* infection. Mycopathologia. 86:35-43. 1984.
- Hall, N. K., K. C. Maluf, and R. Blackstock. Functional testing and chemical composition of cryptococcal extracts. Sabouraudia. 22:439-442. 1984.
- Cunningham, M.W., N. K. Hall, K. K. Krisher and A. M. Spanier. A study of monoclonal antibodies against Group A Streptococci and myosin. Journal of Immunology. 136:293-298. 1985.
- Swerlick, R. A., M. W. Cunningham, and N. K. Hall. Monoclonal antibodies cross reactive with Group A streptococci and normal and psoriatic human skin. Journal of Investigative Dermatology. 84:297. 1985.
- Blackstock, R., J. M. McCormack, and N. K. Hall. Induction of a macrophage suppressive lymphokine by soluble cryptococcal antigens and its association with models of immunologic tolerance. Infection and Immunity. 55:233-239. 1987.
- Blackstock, R., N. K. Hall, and N.C. Hernandez. Characterization of a Suppressor Factor that Regulates Macrophage Phagocytosis in Murine Cryptococcosis. Infection and Immunity. 57:1773-1779. 1989.

Hall, N. K. Changes in demographics at the University of Oklahoma College of Medicine. Oklahoma State Medical Journal. 84(2):66-68. 1991.

Deckert, Gordon H., E. Beckham, and N. K. Hall. Factors influencing choice of specialty and location of residency. Oklahoma State Medical Association Journal. 84(3):107-112. 1991.

Rhoades, Everett R., M.D., F. Daniel Duffy, M.D., N.K. Hall, Ph.D., and Douglas W. Voth, M.D., The University of Oklahoma College of Medicine Rural Health Educational Program. Academic Medicine. 88:531-534. 1995.

Hall, N.K. and C.A. Sullivan. Academic Enrichment for Underrepresented Minorities and Women in Secondary Education. Submitted to Academic Medicine. January 1999.

Cavallo, A.M.L., C.A. Sullivan, N.K. Hall, & Bennett, M. (1999). Promoting participation in the health science professions: Summer programs for talented, underrepresented students in science. School Science and Mathematics, 99(6), 294-301. (Special Issue on Gifted and Talented Students).

Candler, C.S., N.K. Hall, and J.M. Freedman. Collaborative Online Course Scheduling. MD Computing. December, 2001.

ABSTRACTS:

Minocha, H.C., Nancy K. Hall, and D. Kobuszewski. 1976. Influence of hormones on the replication of bovine respiratory disease viruses. American Society for Microbiology. Atlantic City, New Jersey.

Hall, Nancy K., Florence Deighton and H. W. Larsh. 1977. Cell-mediated responses to fractions of an alkali soluble water-soluble extract of *Blastomyces dermatitidis* yeast phase cell walls. American Society for Microbiology. New Orleans, Louisiana.

Hubbard, J.D., Nancy K. Hall and H.W. Larsh. 1977. *In vitro* and *in vivo* effects of 3-amino-7-chloro-3, 4 dihydro-1-hydroxycarbostyryl on a clinical isolate of *Cryptococcus neoformans*. American Society for Microbiology, New Orleans, Louisiana.

Larsh, Howard W., Nancy K. Hall, R.L. Schlitzer. 1977. Dynamics of cryptococcosis in mice challenged with an aerosol of *Cryptococcus neoformans*. Pan American Health Organization.

Hall, Nancy K. 1978. Immune mechanisms in blastomycosis. International Congress for Microbiology. Munich, Germany.

Hollick, G.E., Nancy K. Hall, and H.W. Larsh. 1978. Aerobiology of an industrial plant air system: fungi and related organisms. International Congress for Microbiology. Munich, Germany.

Hall, Nancy K., Florence Deighton, and H.W. Larsh. 1978. Comparison of B-ASWS from three isolates of *Blastomyces dermatitidis* using skin test, migration inhibition and lymphocyte transformation. American Society for Microbiology. Las Vegas, Nevada.

Hall, Nancy K., Florence Deighton, and H.W. Larsh. 1978. Comparative fungistatic and fungicidal effects of merthiolate and formaldehyde on pathogenic yeasts. American Society for Microbiology. Las Vegas, Nevada.

Hollick, Gary E. and N.K. Hall. 1978. Chemical and serological comparison of two antigen extracts of *Thermoactinomyces candidus*. American Society for Microbiology. Las Vegas, Nevada.

Deighton, Florence, Nancy K. Hall, and H. W. Larsh. 1979. Analytical electrofocusing of ASWS extracts from *Blastomyces* and *Histoplasma*. American Society for Microbiology. Los Angeles, California.

Fromtling, R.A., R. Blackstock, N.K. Hall, and G.S. Bulmer. 1979. Lymphocyte transformation of spleen cells from mice immunized with a live, avirulent, pseudohyphal form of *Cryptococcus neoformans*. American Society for Microbiology. Los Angeles, California.

Hall, N.K. and R. Blackstock. 1980. In vitro production of specific antibody to pseudohyphal *Cryptococcus neoformans* by hybridomas. American Society for Microbiology. Miami, Florida.

Blackstock, R. and N. K. Hall. 1980. Immune suppression by *Cryptococcus neoformans*. American Society for Microbiology. Miami, Florida.

Robinson, B.E., R. Blackstock, N.K. Hall, and G.S. Bulmer. 1981. Functional subpopulations of lymphocytes in murine cryptococcosis. American Society of Microbiology. Dallas, Texas.

Lyman, C.A., N. K. Hall and H. W. Larsh. 1981. Effect of hydrocortisone on the conversion of *Histoplasma capsulatum* and *Blastomyces dermatitidis* in Hela cells. American Society for Microbiology. Dallas, Texas.

Blackstock, R. and N. K. Hall, 1981. Suppression of the immune response to an unrelated antigen in murine cryptococcosis. American Society of Microbiology. Dallas, Texas.

Morgan, M.A., R. Blackstock and N. K. Hall, 1982. Modification of macrophage phagocytosis in cryptococcosis. American Society for Microbiology. Atlanta, Georgia.

Blackstock, R. and N.K. Hall, 1982. Suppression of cellular responses in murine cryptococcosis. American Society for Microbiology. Atlanta, Georgia.

Blackstock, R., G.S. Bulmer and N. K. Hall. 1982. Suppressor cell populations in murine cryptococcosis. 13th International Congress of Microbiology. Boston, Massachusetts.

Blackstock, R., B. E. Robinson, G.S. Bulmer and N. K. Hall. 1982. Suppressor cells in cryptococcosis. American Society for Microbiology.

Hall, N. K., G.S. Bulmer and R. Blackstock. 1982. Soluble suppressor factors in murine cryptococcosis. 13th International Congress of Microbiology. Boston, Massachusetts.

Hall, N. K., K. Maluf and R. Blackstock. 1984. Functional testing and chemical composition of cryptococcal extracts. American Society for Microbiology. St. Louis, Missouri.

Blackstock, R., and N. K. Hall. 1985. Regulation of macrophage phagocytosis in murine cryptococcosis. American Society for Microbiology. Las Vegas, Nevada.

Blackstock, R., N. K. Hall and N. C. Hernandez. 1988. Further analysis of PIL, a phagocytosis-inhibiting lymphokine occurring in cryptococcosis. American Society for Microbiology. Miami, Florida.

Blackstock, R., N. C. Hernandez and N. K. Hall. 1988. Macrophage regulation in murine cryptococcosis. International Society for Human and Animal Mycology. Barcelona, Spain.

Hall, N. K., P. A. McHale, R. Blackstock and C. Roberts. 1988. Computer assisted instruction; Replacing traditional lectures in medical school. IBM Academic Conference. Dallas, Texas.

Hall, N.K., P.A. McHale. 1989. Orchestration of curricular change - clinical years. Southern Group on Medical Education. Charlottesville, Virginia.

McHale, P.A. and N. K. Hall, 1989. Computer assisted medical instruction: The promise for the future. IBM Educational Conference. Los Angeles, California.

Hall, N.K., Udwin, M., Gray, K. and McHale, P.A. 1989. Computerization of scheduling – Third year clerkships. Association of American Medical Colleges. Washington, D.C.

Williams, V. and N. K. Hall. 1992. The University of Oklahoma Faculty Leadership Program. Association of American Medical Colleges Faculty Affairs Professional Development Seminar. San Antonio, Texas.

Hall, N.K. 1993. Influence of size of home community on career choice. Research in Medical Education. Association of American Medical Colleges. Washington, D.C..

Hall, N. K. 1994. Preparing graduate students as teachers. American Society for Microbiology. Las Vegas, Nevada.

Hall, N.K. and D. Killam. 1996. Provision of Feedback to Reapplicants Using Interventional Workshops. Innovations in Medical Education (IME) - Group on Educational Affairs. Association of American Medical Colleges. San Francisco.

Hall, N.K. and G. K. Donovan. 1996. Professional Ethics and Professionalism. Innovations in Medical Education (IME) - Group on Educational Affairs. Association of American Medical Colleges. San Francisco.

Hall, N.K. and D.B. Killam. 1998. Increasing Interest and Participation of Admissions Board Members. Group on Student Affairs. Association of American Medical Colleges. Chicago, IL

Williams, V. and N.K. Hall. 1998. An Interdisciplinary Faculty Leadership Program – A Seven Year Experience at the University of Oklahoma Health Sciences Center. National Academies of Practice, 7th Interdisciplinary Health Care Forum, Interdisciplinary Creativity in Practice and Education. Arlington, Virginia.

Hall, N.K., M.D.Andrews, P.A. McHale, and C. Candler. 1998. Basic Science Assessment Workshop. Association of American Medical Colleges. New Orleans, LA.

Hall, N.K. and D.S. Killam. 1999. Broad Representation in Admission Board Decisions. Association of American Medical Colleges Annual Meeting. Washington, D.C.

Robertson, M.J. and N.K. Hall. 1999. Interdisciplinary Teaching Strategies in Managed Care. Association of American Medical Colleges Annual Meeting. Washington, D.C.

Candler, C. and N.K. Hall. 2001. Case Hybrids In Medical Education (CHIMERA). Association of American Medical Colleges Annual Meeting. Washington, D.C.

Hall, N.K., Williams, V. N., Vannatta, J.B., Candler, C.S. 2002. Clinical Teaching and Feedback for Self-Assessment and Self-Directed Learning Skills Development. Association of American Medical Colleges Annual Meeting. San Francisco, CA.

Hall, N.K., and Chris S. Candler. 2005. Using Team Learning In An Integrated Medical Problem-Solving (IMPS) Course For First And Second Year Medical Students. Association of American Medical Colleges. Washington, D.C.

Vannatta, J.B., O'Donoghue, D., Schmidt, J.H., Andrews, M.D., Hall, N.K. 2005. Life Stories Enhancing Humanism During An Anatomy Course. Association of American Medical Colleges Annual Meeting. Washington, D.C.

Hall, N.K., and E.A. Wilson. 2007. Formative Accreditation: Keeping Current with LCME Standards. Association of American Medical Colleges Annual Meeting. Washington, D.C.

SERVICE:

NATIONAL

1989 - 1993 Division V Group Representative. American Society for Microbiology
1986 - 1987 Chairman, Division V Medical Mycology, American Society for Microbiology
1987 - 1997 Planning Committee, Reviewer, Research in Medical Education
1990 - 1998 Member, Liaison Committee for Medical Education Site Survey Teams
1990 - current Selection Committee, Academic All-State Award. Oklahoma Foundation for Excellence. President David Boren
1992 - 1998 American Society for Microbiology – Meetings Board
1996 - 1999 Chair, General Meetings Program, American Society for Microbiology
1999 - 2006 Chair, Committee on Divisions, American Society for Microbiology
1990 - 2008 Liaison, Women In Medicine. Association of American Medical Colleges
1997 - 1999 Councillor - West Medical Mycological Society of the Americas
1989 - 1997 Board of Trustees. Omniplex Science Museum.
1996 - current Board of Trustees. American Red Cross.
1997 - 1999 Board of Trustees. Redlands Council of Girl Scouts.
1999 - 2008 Office of the Chief Medical Examiner – Board of Medicolegal Investigations
1999 - 2005 American Society for Microbiology – Meetings Board
1999 NIH Strong Heart Study – Ethics Advisory Committee
2000 International Association of Medical Science Educators-Editorial Board of Basic Science Educator
1999 - 2001 President Elect, Medical Mycological Society of the Americas
2001 - 2003 President, Medical Mycological Society of the Americas
2001 Chair, International Association of Medical Science Educators Nominating Committee
2001 – current John and Claudia Holliman Affiliated Fund Trustee
2002 - 2008 Chair, Membership Committee, American Society for Microbiology
2002 Fellow, American Academy of Microbiology
2003 - 2008 Committee on Election to Fellowship, American Academy for Microbiology
2002 Hospice Foundation of Oklahoma Trustee
2001 Meetings Board, American Society for Microbiology
2000 - 2008 Secretary Site Survey Teams, Liaison Committee for Medical Education
2005 - 2008 Association of American Medical Colleges. Review Committee MedEdPORTAL
2009 – current The Wisdom Family Foundation Board of Trustees
2010 – 2014 Board of Governors. Arts Council of Oklahoma City (Vice President, Chair, Development)
2012- current Board of Trustees. Lynn Health Research Institute.
2012-current Board of Trustees. Lynn Health Sciences Institute – Clinical Trials.

UNIVERSITY

1979 - 1994 Biohazards Committee - Veteran's Administration

1980 - 1984	Scientific Subcommittee - American Heart Association
1985 - 1986	President, Sigma XI
1987 - 1988	Search Committee – Affirmative Action Officer
1988 - 1989	Chair, College of Medicine Centennial Celebration Committee
1989 - 1991	Coordinator - M.D./Ph.D. Program Development
1989 - 1990	Chair, Merit Scholarship Task Force - Provost Committee.
1991 - 1992	Infectious Disease Policy Committee
1991 - 1992	Student Health Insurance Committee
1992	Educational Enhancement Program Review Committee University and Presbyterian Health Foundation
1990 -	Special Initiative Committee of the M.D./Ph.D. Program
1995 - 1998	Academic Program Council, Chair
1996 - 1999	Faculty Appeals Board
2000 - 2008	Co-Director, MD/PhD Program
2002 - 2008	Academic Oversight, Physician Associate Program, Master of Science
1998 - 2002	Samuel Roberts Noble Foundation Presidential Professor, named Professorship
2004 – 2008	Member, Patricia Price Brown Distinguished Prize for Bioethics Selection Committee
1997 - 2008	Women in Medicine Liaison – Association of American Medical Colleges
2006 – 2008	Health Sciences Center Presidential Professorships Selection Committee

HEALTH SCIENCES CENTER

1981 - 1984	Faculty Senate - Faculty Affairs Committee
1981 - 1982	Search Committee - Dean of the College of Medicine
1979 - 1983	Faculty Appeals Committee
1982	Search Committee - Chairman of Microbiology and Immunology
1982 - 1985	Senator - College of Medicine Faculty Senate
1983 - 1985	Secretary of the Faculty
1985	Search Committee - Dean of the College of Medicine
1988 - 1989	Policy Director - AIDS Education and Resource Center
1987 - 1989	Task Force for Health Sciences Center on AIDS
1987 - 1989	Health Sciences Enrichment Institute. Admissions Committee
1986 - 88:90-91	Health Careers Opportunity Program
1990 - 2008	Faculty Leadership Program Deputy Director
1993 - 1996	Faculty Senate Representative, College of Medicine
1996 - 1999	Chair, Academic Program Council
1998	OUHSC Discover Program, Advisory Committee
1999 - 2002	Oklahoma Center for Neuroscience Executive Committee
1999 - 2008	Co-Director of MD/PhD Program
2006 – 2008	Presidential Professorship Committee

COLLEGE OF MEDICINE

1980 - 1987	Animal Care Advisory Committee
1979 - 1990	Second Year Promotion and Implementation Committee
1980 - 1982	Predoctoral Education Committee
1981 - 2008	Admissions Board - College of Medicine
1985 - 1990	Admissions Officer
1985 - 2008	Dean of Admissions
1984 - 1999	Recommendations Subcommittee Admissions Board -Medicine
1983	Educational Objectives Planning Committee - Medicine
1981 – 83; 1985-90	Faculty Board
1981	Code of Conduct Evaluation
1983	Medical Education Committee

1985 -1987	Chair, Basic Sciences Promotions and Implementations
1987 - 2008	<i>Ex Officio</i> member Basic Sciences Promotions and Implementations
1987 - 1989	Chair, Clinical Sciences Promotion and Implementations
1987	<i>Ex Officio</i> member, Clinical Sciences Promotion and Implementations
1981 - 1984	Learning Environment Appraisal Steering Committee
1984 - 1985	Professionalization/Dress Code Committee
1987 - 1992	Curriculum Review - Basic Sciences and Clinical Sciences
1987	Recruitment Strategic Planning and Implementation
1989 - 1992	Clinical Year, Curriculum Revision. Implementation
1990 - 1996	MD/Ph.D. Selection and Advisory Committee
1992 - 1995	Chair, Clinical Coordinator's -Tulsa and OKC
1997 - 2002	Member, Basic Science Curriculum Committee
1997 - 2008	Clinical Science Curriculum Committee
1997	Coordination Committee for Curriculum
1997	Faculty Advisor, American Medical Women's Association
1999	Manuscript Reviewer, Basic Science Educator
2002 - 2008	Chair, Clinical Sciences Curriculum Committee
2002 - 2008	Chair, Basic Sciences Curriculum Committee
2004 - 2008	Chair, Curriculum Coordinating Committee
2003 - 2007	Faculty Advisor, American Medical Student Association

GRADUATE COLLEGE

1982 - 1985	Graduate Council
1983 - 1986	Financial Planning Committee
1978 - 2008	Graduate Faculty
1990 - 2008	M.D./Ph.D. Advisory Committee

DEPARTMENT OF PATHOLOGY

1980 - 1983	Pathology - Master Search Committee
1980 - 1984	Pathology - Promotions and Tenure Committee
1980 - 1984	Pathology - Director of Histology and Immunopathology
1981 - 1984	Pathology - Director of Core Facilities
1981 - 1983	Neuropathology Search Committee
1983 - 1988	Chair - Graduate Student Education Committee
1980 - 1985	Pre-clinical Academic Planning Committee
1993 - 1995	Graduate Student Selection and Advisory Committee
1997 - 2007	Telelearning/CME/Telepathology
1997	Board of Visitors Selection/Recruitment Team
1999	Pathology Housestaff Program Recruitment Subcommittee
1999 - 2001	Chair, Promotions and Tenure Committee
2000	Interim Department Chair

CONSULTANTSHIP:

1980 - 90	Immunology, Missouri State Chest Hospital Mt. Vernon, Missouri
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WORKSHOPS:

April 1980	Medical Mycology Mayo Clinic
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October 1981	Southwest Clinical Radioassay Society Isoelectric Focusing Missouri Branch, American Society for Microbiology
June 1992	Association of American Medical Colleges Professional Development Conference. Invited speaker. Legal Issues of Admissions
January 1992	Association of Professors of Gynecology and Obstetrics. National Meeting. Invited Speaker. Executive Skills for Medical Educators – Interpretation and Use of the Dean’s Letter for Residency Selection
January 1993	Association of Professors of Gynecology and Obstetrics. National Meeting. Invited Speaker. Evaluation of Applications for Residency Selection. Amelia Island, Florida
January 1994	Association of Professors of Gynecology and Obstetrics. National Meeting. Invited Speaker. Educational initiatives for junior faculty. Maui, Hawaii
1986 -	Admissions Workshop for pre-medical and pre-health professional faculty advisors. OUHSC, Oklahoma City, OK
1993 -	Admissions Workshop for unsuccessful applicants. OUHSC, Oklahoma City, OK
1996 - 99	American Society for Microbiology Division Chairs Orientation
1996 - 99	Chair, Colloquia Advisory Committee. American Society for Microbiology
1998 -	Chair, Committee on Divisions, American Society for Microbiology
November 1998	Association of American Medical Colleges Group of Educational Affairs Mini-workshop, “Basic Sciences Curriculum Assessment – Design and Implementation Experiences,” New Orleans, LA.
November 2002	Clinical Teaching and Feedback for Self-Assessment and Self-Directed Learning Skills Development. Association of American Medical Colleges Annual Meeting for the Group on Education Affairs (GEA) and the Group on Education Affairs (GSA) Program. San Francisco, California.
September 2004	Facilitator. Department of Surgery Strategic Planning 2005 – 2010
November 2004	Facilitator. Department of Neurology Strategic Planning 2005 – 2009
August 2010	Facilitator. OU College of Medicine Chairmen Leadership Conference.
September 2010	Facilitator. OUHSC Provost Conference of Deans
September 2010	Facilitator. Weekend Teaching Retreat. Department of Surgery.
June 2011	Facilitator. Department of Surgery Retreat.
May 2013	Facilitator. Department of Surgery Retreat
May 2013	Facilitator. Department of Rehabilitation Sciences.
October, 2013	Facilitator. Oklahoma Health Center Foundation.

ADMINISTRATION:

1979 - 1983	Chief, Academic Pathology, Department of Pathology
1980 - 1984	Director of Department of Pathology Core Facilities: Histology, Histocytochemistry and Immunopathology
1980 - 1984	Budget responsibilities for Academic Pathology – research monies
1979 - 1984	Personnel Management. Direct supervisor of Graduate Program, Secretarial Staff and Technical Support
1984 - 1989	Director of Graduate Student Education
1984	Assistant – Associate Dean for Admissions, College of Medicine
1984 - 1986	President – Sigma Xi – Oklahoma Chapter
1985 - 1995	Assistant – Associate Dean of Students, College of Medicine
1988 - 1995	Chief Proctor. National Board of Medical Examiners
1988 - 1095	Director. University of Oklahoma National Residency Match Program
1997 - 2002	Associate Dean for Admissions and Medical Education
2001 - 2003	Medical School Liaison. National Board of Medical Examiners
2003 – 2008	Associate Dean for Academic Affairs

AWARDS:

1982	Aesculapian Award for Excellence in Teaching the Basic Sciences
1983	Aesculapian Award for Excellence in Teaching the Basic Sciences
1984	Aesculapian Award Nominee for Excellence in Teaching
1985	Aesculapian Award Nominee for Excellence in Teaching
1985	Blue Cord Society
1986	Stanton L. Young Master Teacher Award
1986 - 1988	Professora, La Universidad Autonoma de Guadalajara, Jalisco, Mexico
1989 - 1991	Divisional Representative, Division F, American Society for Microbiology
1991 - 1993	Divisional Group Representative, Group V, American Society for Microbiology
1993 - 1996	Chair, General Meetings Committee, American Society for Microbiology
1994 - 1996	Councilor - West. Medical Mycological Society of the Americas
1994 - 1995	Woman of the Year for Medicine and Education. Redlands Council for Girl Scouts of America
1998	Samuel Roberts Noble Foundation Presidential Professor
2002	Association of Women in Communications Byliner Award for outstanding dedication and achievements in the health field
2003	University of Oklahoma Department of Pathology Residency Award
2008	Oklahoma State Medical Associated Don J. Blair Friend of Medicine Award

COMMUNITY SERVICES:

1985	The Forum
1987 - 1988	Leadership Oklahoma City, Class VI
1987 - 1992	Chair, Selection Committee. Hadson Scholarships, Hadson Oil International
1988 - 1991	Board of Directors. Sunbeam Family Services. United Way Services.
1988 - 1995	Board of Directors, Omniplex Science Museum
1990 - 1991	Vice President for Development. Omniplex Science Museum
1988 - 1989	Executive Committee, Leadership Oklahoma City
1984 -	Junior Hospitality Club, Inc.
1984 -	Oklahoma Zoological Society
1985 -	Children’s Medical Research, Inc.
1983 - 1990	Advisor, Kappa Kappa Gamma Society Sorority
1987 - 1990	Program Chairman, Leadership Oklahoma City
1989 - 1990	Leadership Oklahoma, Class III
1991 -	Selection Committee, Academic All-State, Foundation for Excellence.

1993 -	American Indian Alumni Society of the University of Oklahoma
1992, 93, 94	Program Committee. Health Day. Leadership Oklahoma
1993 - 95: 1995 - 97	Advisory Board, Leadership Oklahoma
1995 - 1996	Member Program Committee, Omniplex Science Museum
1996 - 1998	Board of Trustees, Leadership Oklahoma City
1996 - 2000	Oklahoma Academy for State Goals
1996 - 1999	Board of Trustees, American Red Cross – Chair, Health and Safety
1998 - 2001	Board of Trustees, American Red Cross – Chair, Human Resources
2001 - 2005	Board of Trustees, American Red Cross – Chair, Service Delivery
1996 – 2008	Board of Trustees, American Red Cross – Secretary
2012	Lifetime Board of Trustees, American Red Cross
1997 - 2001	Board of Trustees, Redlands Council for Girls Scouts – President (2001)
1999 - 2006	Board of Directors, Hospice Foundation of Oklahoma, Inc.
2008 – 2013	Board of Directors – Leadership Oklahoma, Inc.
2010 - 2012	Leadership Oklahoma Program Chair
2008 – current	Arts Council of Oklahoma City
2012 – current	Board of Trustees. Lynn Health Research Institute

VOLUNTEER SERVICES:

American Lung Association
 American Heart Association
 Dale Rogers Center for the Mentally Handicapped
 Parents Assistance Center
 Myriad Garden Run/Quail Creek Run
 Chance to Change - Drug Recovery
 Danforth Senior Citizens
 American Cancer Association
 Oklahoma Art Museum
 Opening Night - Oklahoma Arts Council
 Oklahoma State Medical Association - Women in Medicine
 Oklahoma Medical Women's Association
 American Red Cross
 Girl Scouts of the United States of America
 Board of Medicolegal Investigations
 Festival of the Arts – Angels and Friends
 Leadership Oklahoma City
 Leadership Oklahoma, Inc.
 Foundation for Excellence Education Foundation
 Allied Arts of Oklahoma
 Wisdom Family Foundation
 John H and Claudia Holliman Community Foundation
 Lynn Health Research Institute

James E. Kemper

Home: 28890 Chieftain Drive, Logan, OH 43138 *Phone: (740) 603-2626
Office: Zane State College; 1426 Newark Rd.; Zanesville, Ohio 43701
*Phone: (740) 588-1209 *Email: jkemper1@zanestate.edu

EXECUTIVE SUMMARY

During my career I have been fortunate to have been mentored by seasoned and innovative human resource and business leaders. These diverse individuals have instilled in me a deep passion for and understanding of administration, operations, and most importantly people management. They have helped me develop a deep respect for our traditions and a high regard for change and effective change management practices. I am a better person and wiser leader by these individuals having come along side me.

With more than thirty combined years of human resource and leadership experience I have supervised multiple areas of operational units ranging from private industry manufacturing operations; to government agencies; and, focused mostly on higher education institutions. While I have teaching and research experiences in higher education I have immersed myself into the function of Human Resource management capacities including the role of the Chief Human Resource Officer, and the functional areas of compensation, benefits administration, talent management, communication, and organization & leadership development. I enjoy strategic planning, project management, and the overarching aspects of human capital management.

I strive to be an effective communicator and team builder and I thrive on collaboration.

Having worked in both the public and private sectors, I have developed an appreciation for creative solutions to new and existing problems. I have learned the value and benefit of shared governance. And, I understand the need to remain in compliance with local, state, and federal laws and organizational policies. Recent years have instilled in me the need for a blend of continuous improvement, the maximizing of efficiency in business operations, and remaining accredited through multiple accreditation bodies.

Education

- **Ph.D., Higher Education Administration** – March 2001
Ohio University, Athens, Ohio

Dissertation topic – *“The Role of the Human Resource Office In the Collegiate Environment: Identifying the Components for Being a Strategic Partner.”* Beyond the literature review, I surveyed the chief executive officers and the chief human resource officers at 610 public and private institutions across the United States. The dissertation has been replicated several times.

- **Senior Professional in Human Resources (SPHR)** – January 1996
Human Resource Certification Institute – Washington, D.C.; lifetime certification
- **Masters of Business Administration** – Spring 1983, Cum Laude
Ohio University, Lancaster, Ohio
- **Bachelor of Business Administration** – Winter 1979, Cum Laude
Ohio University, Athens, Ohio

Professional Experience

- **Vice President for Administration & CHRO**

Zane State College – Zanesville, Ohio – November 2011 to Present

- **Promoted to Vice President** on July 1, 2014

In addition to continuing in my role as head of Human Resources, I also assumed the duties of overseeing the following administrative offices:

- **Information & Technology Services** (ITS has a staff of 12 and is responsible for all academic and administrative computing for the College);
- **Institutional Effectiveness & Planning** (IEP has a staff of 2 employees and is responsible for all activities related to institutional research; and, oversight for the College's accreditation processes including the Higher Learning Commission's AQIP processes and initiatives);
- **Secondary & Strategic Initiatives** (SSI has a staff of 4 and is responsible for College Credit Plus, Tech Prep, and Pathways to Engineering programs).
- **Adjunct Services** (this department has a staff of 2 and is responsible for the talent management strategies related to the employment of our adjunct employees).

As the Chief Human Resource Officer (CHRO) I have responsibility for supervising the Human Resources staff while we manage all talent management practices and strategies for the College as well as compensation and benefits including wellness programming. We are also responsible for rewards and recognition programs, our performance feedback processes, and employee relations matters for the College. We are also responsible for HR-related compliance responsibilities such as Title IX, payroll processing, training and development of staff, strategic planning, and leadership development. We were selected by The Chronicle to be a 'Great College to Work For' for 2011 and 2012.

President Paul Brown was awarded CUPA-HR's inaugural 'Chief Executive HR Champion Award' which was presented at the October 2013 national conference.

I was recently selected as Zane State College's *Administrator of the Year 2012-13!* And, in January 2014 we (HR) created and began The College Leadership Institute, an 8-month experience to create a succession plan for our college and a development opportunity for the community college sector.

- **Director, Higher Education Services & Regional Account Manager**

IMPACT Solutions – Cleveland, Ohio – March, 2011 to November, 2011

IMPACT is a behavioral healthcare and people development consulting firm with an experienced staff of EAP, coaching, training, and organizational development specialists. I manage the Columbus office.

Since 1981 IMPACT has been helping colleges and universities succeed by empowering their faculty and staff to thrive through our Employee Assistance Program (EAP), Executive/Leadership Consulting, Student Retention Support, and Workplace Trainings. My responsibilities included business development, new program development – particularly for academic chairs, and account management for higher education institutions. I enjoyed working with 20 higher education client institutions and other institutions throughout the Midwest.

- **Director, Organization & Human Resource Consulting**

The Ohio State University – Columbus, Ohio – June, 2008 to March, 2011

I supervised the office of Organization and Human Resource Consulting (OHRC) – a team of 42 professionals that provided innovative HR solutions for academic and administrative offices. Our consulting approach integrated our core areas of expertise. We worked collaboratively through a team-based approach to deliver strategic consulting (**a matrix organization**) to the main campus and each of the regional campuses. Each OHRC team was comprised of one or more subject matter experts in:

Employee and Labor Relations, Organization Development, Learning and Development, Talent Management, Compensation, Human Resource Assistants

Additionally, OHRC had managers who served across teams to provide university-wide expertise in the areas of: Employment Law/Compliance; Labor Relations; Mediation; Policy Development; Work Life; and, Project Management, and Adult Basic Education & Literacy.

○ **Loaned Executive, Inter-University Collaboration & Shared Services Initiatives**

The Inter-University Council of Ohio – Columbus, Ohio

As part of my work for OHR I entered the OSU ‘Loaned Executive Program’ for a 12-month assignment with the Inter-University Council of Ohio, a consortium of Ohio’s 14- public universities. The charge from the executive committee of the presidents was to generate initiatives and collaborative efforts between the institutions in achieving significant cost-savings and efficiencies, notably the creation of a framework for a member-based Shared Services Office.

● **Associate Vice President, Human Resources**

Ohio University – Athens, Ohio – October 1989 to June, 2008

As Associate Vice President and Chief Human Resource Officer, I reported to the Vice President for Finance and Administration and was responsible for 32 full-time employees and managing a budget of just over \$1.9 million and a medical benefits budget of over \$37 million. Directly reporting to me were Directors of:

* **Benefits & EAP** * **Compensation** * **Employee & Labor Relations** * **Staffing**
* **Records Services** * **HR Systems** * **The Center for Organization Development & Effectiveness.**

Served as official liaison to the **Classified Senate** and at times the **Administrative Senate**.

During my tenure we moved into the Human Resource & Training Center and simultaneously created and implemented the Center for Organization Development & Effectiveness. The Center partnered with Hocking College and provided a full range of training, leadership, and organization development programs and services..

● **Director, Human Resources**

Longaberger, Inc. – Dresden, Ohio –1987 to 1989

Was responsible for a staff of 15 professionals. We were responsible for employment-related activities and legal compliance as well as employee relations, records, training, and etc. We led the growth of the company from 800 employees to over 3,000 during my tenure. We provided a full-range of human resources services including a state-of-the-art Employee Assistance Program.

● **Assistant Dean, Training & Consulting Center**

Muskingum Area Technical College – Zanesville, Ohio –1984 to 1987

Was responsible for business and industry outreach programs and other continuing education activities. This included the following:

- **business & industry outreach** for the college; developed dozens of community-wide program initiatives including bringing an official Walt Disney World ‘People Management Program’ to the community; in the 3 1/2 years at the college our team secured over 200 individual business related income-generating projects
- the securing and managing of the **Ohio Industrial Training Program grant** and training programs
- the securing and managing of the **Ohio Technology Transfer Organization grant** and related consulting projects
- served on college committees including search committees, e.g., Dean of Allied Health
- voted ‘**employee of the year**’ and awarded the achievement at the annual graduation ceremony.

● **Assistant Department Manager**

Anchor Hocking Corporation – Lancaster, Ohio and Clarksburg, West Virginia –1979 to 1984

Was responsible for supervision of 5 senior shift supervisors in a department of 428 employees. We selected, packed and shipped company products, mostly industrial glassware.

I was selected for this appointment following an 18-month corporate management trainee program.

- **College-level teaching:** I taught for 13 years at Hocking College as an Evening Division Instructor in the Business Management Technology. During my tenure at Ohio University I frequently taught senior and graduate-level courses for the College of Business. I am currently an evening instructor (teach SAM3050) for the Ohio University-Zanesville campus.
 - Certified in **Excellence In Higher Education** – developed by Dr. Brent Ruben at Rutgers University; the process applies the Malcolm Baldrige continuous improvement practices in the higher education environment.
 - **Zenger/Miller certified.**
 - **Butler Learning Systems certified:** continuous improvement & quality circle facilitator
 - Recently appointed as a senior-level Instructor for the **University of Phoenix.**
 - Currently an instructor for the **American Physical Therapy Association (APTA)** ‘Executive Leadership Institute’.
-

Selected Successful Projects While at The Ohio State University

1. **Secured a grant from The Columbus Foundation (\$277,000)** for purposes of adult training and development and employment security for residents of the Weinland Park District.
2. **Obtained funding and approval to move forward on a major Classification & and Career Development project.**
3. **Re-organization of the Department of Organization and Human Resource Consulting**
 - secured \$240,000 to hire term consulting employees in the expert areas of:
 - Organization Development
 - Talent Management
 - Employee Relations
 - Labor Relations
 - re-organized the staffing structure of the unit to more appropriately fit our future direction and senior officer needs.
 - reduced the transactional workload of the unit by creating a broad-based ‘retrenchment strategy’.
 - created the OHRC Leadership Team (to create a decision-making structure)
4. Was able to lead several projects to completion on behalf of my immediate supervisor, an executive officer of the institution:
 - a. assisted the Ohio Attorney General (interim Nancy Rogers) in creating a sustainable Human Resources strategy and organization structure.
 - b. continued to chair the Inter-University Council HR Committee as chair.
 - c. coordinated the two semi-annual meetings of the Committee on Institutional Cooperation (an organization of the Big Ten institutions and the university of Chicago).
 - d. led the university strategy team to thwart legislation known as the Healthy Families Act.
 - e. led the university’s compliance program with E-Verify legislation.
5. Department Secured an NSF Grant affiliated with moving women into the STEM fields related to research, teaching, and service.
6. Served on Committee to Transfer Payroll to Business & Finance division from the Executive Vice President & Provost division.

Professional Speaking & Consulting Engagements

- Consultant

Throughout my career I have been privileged to serve as an HR-related consultant, most often in higher education. These opportunities are limited but have always been a learning moment for me, to gain a deeper understanding of best practices.

Clients and project information available upon request.

- Speaker

I will occasionally be asked to be a speaker at HR-related events. These, too, present opportunities to discover new information and collaborative opportunities.

Speaking engagements, topics, and references available upon request.

- National Board of Directors, CUPA-HR (2004 to 2006)

- Most notable achievements:
 - Co-Chair of Committee that created the Associations 'Knowledge Center'
 - Chair, Faculty Collaboration Task Force
 - Founder, Chair of the International Think Tank
 - National Foundation Board of Directors
- Have been active in CUPA-HR at the state, regional and national levels since 1989.

- Personal information

- Immediate Past President of a national organization: Society of Higher Education Human Resource Executives
- Member of the College & University Professional Association for Human Resources
- Member of the Society of Human Resource Management
- Serve as Elder at Antioch Alliance Church
- Co-founder of ManUP and CoupleUP (two events that are designed to strengthen men in their spiritual lives thus impacting their world in a positive, productive way; and, deepening husband and wife relationships thus impacting the next generation).

Other references and additional information is available upon request.

University of Washington Division of the Attorney General's Office 1976-1999

1992-1999 Senior Counsel, Assistant Attorney General, Attorney General's Office, State of Washington, University of Washington Health Sciences and Medical Centers (on campus). (Clients included: Schools of Dentistry, Medicine, Nursing, Pharmacy, Public Health and Community Medicine, and Social Work, as well as Harborview Medical Center, University of Washington Medical Center, Hall Health Center, and Airlift Northwest)

1993-Feb-Oct. Acting Chief Counsel to University of Washington

1976-1999 Counsel to University of Washington Health Sciences and Medical Centers (See client list above.)

1976-1993 Assistant Chief Counsel and Assistant Attorney General for the University of Washington

Education Division, Attorney General's Office 1969-1980

1970-1976 Assistant Attorney General (general counsel on campus) for Central Washington State College (now Central Washington University)

1969-1980 Assistant Attorney General, Education Division of Attorney General's Office -- general counsel for eight community college districts and their Boards of Trustees

April 1973 - December 1980 Bellevue Community College

April 1973 - September 1976 Seattle Community College District (Three campuses)

April 1973 - September 1976 Edmonds/Everett Community College District (Two campuses, now two separate community colleges)

July 1970 - September 1973 Wenatchee Valley and Yakima Valley Community Colleges

September 1969 - July 1970 Clark, Lower Columbia, and Centralia Community Colleges

PROFESSIONAL AFFILIATIONS AND MEMBERSHIPS

National Association of College and University Attorneys (NACUA) (1971-Present)
Member, Board of Directors (1997-2000)
Chair, NACUA Professional Development Committee (1996-1998)
Chair of Arrangements Committee, NACUA 1997 Seattle Conference (1996-1997)
Co-Chair of the Section on Health Sciences, NACUA (1985-1986)
Washington State Bar Association (1969-Present)
Washington State Society of Healthcare Attorneys (1976-2001) (2004-2005)
President 1987-1988
Secretary-Treasurer 1985-1986
Board of Directors 1980-1982

MARTINDALE-HUBBELL, INC. RATING

Legal Ability Rating "A" (From Very High to Preeminent)
General Recommendation Rating "V" (very high) [Highest ratings awarded]

FACULTY APPOINTMENTS

Affiliate Assistant Professor at University of Washington, School of Medicine, Department of Bioethics and Humanities, (1989-present)

Part-time Lecturer, University of Washington School of Law, "End-of-Life Seminar."
(Winter Quarter 2009, 2011, 2012 and 2013)

Adjunct Professor, Seattle University College of Education, Department of Student Development Administration, graduate Course "Higher Education Law"
(Winter and Spring Quarters 2012 and 2013)

Faculty/Expert, American Physical Therapy Association, Education Leadership Institute
(Fall, and Winter 2012)

Visiting Instructor, Seattle Pacific University Summer Sessions, Graduate course, "Education and the Law" for the School of Education (1979-1985)

Visiting Instructor, Central Washington University, Summer Sessions Graduate course, "Education and the Law" for the School of Education (1971-1976) Guest speaker: Justice William O. Douglas, July 1971

OTHER PROFESSIONAL EXPERIENCE

Co-Feature Editor, Perspective on Physician Assistant Education (1998-2005)

Co-Instructor, Medical Jurisprudence (Law and Ethics in Medicine) (Medical History and Ethics (MHE) 535 University of Washington School of Medicine (1989-1991)

Member/Counsel to Statewide Task Force on Life Support Issues (1986-1987)

Speaker for the National Academy of School Executives "An In-Service Arm of the American Association of School Administrators" (1974-1981)

Organized and directed three state-wide seminars on "Education and the Law," presented and sponsored by the Washington State Attorney General's Office, Central Washington State College, and the Superintendent of Public Instruction for School Administrators and Directors, Ellensburg, Spokane, and Seattle, Washington (1972)

PUBLICATIONS

Milam, S., Rooker, M. (2006). Student Criminal Background Checks, National Association of College and University Attorneys NACUANOTES March 10, 2006, Vol. 4 No.1.

Katz, J. R., Woods, S.L., Cameron, C.A., Milam, S.D. (2004). Essential Qualifications for Nursing Students, Nursing Outlook, 52, 277-288.

Cameron, C.A. & Milam, S.D. (2003). Academic dismissals: So it's time for due process, what process is due? Perspective on Physician Assistant Education, 14(1), 43-46.

Milam, S.D. & Cameron, C.A (2001). Put it in Writing or Be Prepared to Go For a Ride: A Case Study in Due Process. Perspective on Physician Assistant Education, 12 (2), 121-124.

Cameron, C.A. & Milam, S.D. (2001). There's Never a Good Time for an Academic Dismissal. Don't Postpone the Inevitable Waiting for the Right Time. Perspective on Physician Assistant Education, 12 (1), 49-52.

Milam, S.D. & Cameron, C.A. (2000), You Don't Have to But You've Decided to Give the Student Another Chance, So.... Perspective on Physician Assistant Education, 11 (3), 188-191.

Cameron, C.A. & Milam, S.D. (2000). What do You Mean I Can't Take the Test Over? You Let Everyone Else Have a Second Chance, and You Said I Could - It's not Fair!!! Perspective on Physician Assistant Education, 11 (2), 120-124.

Milam, S. D. & Cameron, C. A (2000). Just Who's Teaching This Class Anyway? Perspective on Physician Assistant Education, 11, (1), 45-48.

Cameron, C. A. & Milam, S. D. (1999). Pass or Fail - You Decide - But Are You Right or Wrong? Will Your Grade Assignment Withstand Judicial Scrutiny? Perspective on Physician Assistant Education, 10, (4), 203-207.

Milam, S. D. & Cameron, C. A. (1999). The Use of Non-Cognitive Criteria in the Academic Evaluation of Physician Assistant Students. Perspective on Physician Assistant Education, 10, (3), 149-151.

Cameron, C. A. & Milam, S. D. (1999). Letters of Reference: When the Truth Hurts. Perspective on Physician Assistant Education, 10, (2), 86-90.

Milam, S. D. & Cameron, C. A. (1999). To Disclose or Not to Disclose? The Sharing of Student Evaluations with Prospective Clinical Evaluators. Perspective on Physician Assistant Education, 10, (1), 32-34.

Cameron, C. A. & Milam, S. D. (1998). Show and Tell: Who May See the Student Record? Perspective on Physician Assistant Education, 9, (4), 223-227.

Milam, S. D. & Cameron, C. A. (1998). A Legal Context for the Use of Information Technologies in Physician Assistant Education. Perspective on Physician Assistant Education, 9, (3), 167-169.

Szekely, D.G., Milam, S.D. & Khademi, J.A. (1996). Legal Issues of the Electronic Dental Record: Security and Confidentiality. Journal of Dental Education, 60, (1), 19-23.

Irby, D.M., & Milam, S.D. (1989). The Legal Context for Evaluating and Dismissing Medical Students and Residents. Academic Medicine, 64, 639-643.

Milam, S.D. & Marshall, R.D. (1989). Impact of Regents of University of Michigan v. Ewing on Academic Dismissals from Graduate and Professional Schools. Journal of Law and Ethics in Dentistry, 2, (1), 22-31. (Editor's requested reprint of Journal of College and University Law article referenced immediately below.)

Milam, S.D. & Marshall, R.D. (1987). Impact of Regents of University of Michigan v. Ewing on Academic Dismissals from Graduate and Professional Schools. Journal of College and University Law, 13, (4), 335-352.

Irby, D.M., Fantel, J.I., Milam, S.D., & Schwarz, M.R. (1981-82). Faculty Rights and Responsibilities in Evaluating and Dismissing Medical Students. Journal of College and University Law, 8, (1), 102-119. (Expanded version of Article in New England Journal of Medicine, 301, (3), 180-184 referenced immediately below.)

Irby, D.M., Fantel, J.I., Milam, S.D., & Schwarz, M.R. (January 15, 1981). Special Report, Legal Guidelines for Evaluating and Dismissing Medical Students. New England Journal of Medicine, 304, (3), 180-184.

Invited Presentations/Consultations/Workshops

Topics:

A. Education Law

Legal Issues (due process, discrimination, defamation, disability (ADA), use of subjective judgment, documentation, remediation, judicial principles) in the

Evaluation of Clinical Performance and Academic Dismissal of Students and Residents in the following professional fields:

- Acupuncture
- Allied Health
- Athletic Trainer Education
- Critical Care Nursing
- Counseling
- Dental Hygiene
- Dentistry
- Emergency Medical Services Professions
- Health Professions
- Laboratory Medicine
- Medicine
- Naturopathy
- Nursing
- Occupational Therapy
- Oriental Medicine
- Osteopathy
- Pharmacy
- Physical Therapy
- Physician Assistant Training
- Psychiatry
- Respiratory Therapy
- Social Work
- Surgical Technology
- Teacher Education

B. End-of-Life Issues

- Directives to Physician and End-of-Life Issues
- Legal and Legislative Developments. National Health Forum “Physician-Assisted-Death: Implications for Patients, Care Providers, and Society.”
- Supporting Difficult Health Care Decisions of Patients, Families and Providers
- Withdrawal of Artificial Nutrition and Hydration - Are the Courts Retreating?
- Should Nutrition and Hydration be Legislated?
- Medical and Legal Issues at the End-of-Life
- Drafting for Life and Death
- Living Wills, No Code and Informed Consent
- Living Wills/Anatomical Gifts
- Historical Overview – Meaning of the Right to Die, Development of Legal Principles

C. Health Law Issues

- Legal Issues Related to Risk Management

- Legal Perspective of Ethical Controversies in Critical Care
- The “Call in the Night,” Criminal and Security Issues for Hospital Attorneys
- Religious Issues in Teaching Hospitals
- New HIPAA Regulations and Privacy Rights
- Compliance and Physician Education
- AIDS on Campus: An Overview of the Legal Issues
- AIDS and the Exposed Health Care Provider, House-staff and Student
- Legal Ramifications of Infectious Diseases
- Physicians and AIDS: At Risk or A Risk?
- AIDS: Consent, Treatment and Discrimination Issues
- Student Suicide: Institutional Considerations
- FDA Audit of IRB Members and Boards

D. General Legal Issues

- Legal Considerations in Faculty Development
- Americans with Disabilities Act (Section 504, ADA, and ADAA)
- Criminal Background Checks of Applicants, Students, Staff and Faculty
- Professional Behavior of Faculty
- Legal Counsel: Your Professional Partner
- Avoiding Wrongful Employment Termination: Case Studies
- Legal Aspects Pertaining to Departmental Administration, Faculty and Staff Relations
- Award of Attorney’s Fees to Defendants in a Frivolous Suit – Meyer v. University of Washington

Institutions of Higher Education – Selected National and International

- Siriraj Hospital and Medical Center, Bangkok, Thailand
- Jefferson College of Health Professionals, Philadelphia, PA.
- Alabama State University, Montgomery, Alabama.
- Armstrong Atlantic State University, College of Health Professions,. Savannah, Georgia
- College of Allied Health Sciences. University of Cincinnati. Cincinnati, Ohio
- Division of Science, Health and Businesses. Monroe Community College. Rochester, New York
- Schools of Dentistry, Schools of Nursing, Medicine and Pharmacy. University of Missouri-Kansas City. Kansas City, Missouri
- School of Nursing, Oregon Health and Science University. Portland, Oregon
- University of Illinois at Chicago. College of Dentistry. Chicago, Illinois
- Provo College. Provo, Utah
- Louisiana State University School of Dentistry. New Orleans, Louisiana
- Northeastern Wisconsin Technical College. Green Bay, Wisconsin
- Lasell College. Newton, Massachusetts
- University of Utah. Snowbird, Utah

- Medical College of Ohio, Toledo, Ohio
- University of Iowa. Iowa City, Iowa
- University of Washington and the University of Washington Dental Service Foundation. Seattle, Washington
- Northwestern University Medical School. Chicago, Illinois
- Washington University School of Medicine. St. Louis, Missouri
- St. Louis University School of Medicine. St. Louis, Missouri
- University of Texas Medical School. Houston, Texas
- University of Arkansas College of Medicine. Little Rock, Arkansas
- University of Arizona College of Medicine. Tucson, Arizona
- School of Medicine, University of Nevada. Reno, Nevada
- College of Medicine, University of Florida. Gainesville, Florida
- University of West Virginia School of Medicine. Morgantown, West Virginia
- Stanford University Hospital. Palo Alto, California
- Harrisburg Area Community College, Harrisburg, Pennsylvania

Institutions of Higher Education – Selected Regional/Local

- College of Nursing, Seattle University. Seattle, Washington
- Department of Nursing. Gonzaga University. Spokane, Washington
- Central Washington University. Ellensburg, Washington
- Washington State University Academic Administration and Staff. Pullman, Washington
- College of Education Faculty. Seattle University. Seattle, Washington
- Whatcom Community College. Bellingham, Washington
- Yakima Valley Community College. Yakima, Washington
- Seattle University School of Law. Seattle, Washington
- Orthopaedic Grand Rounds, School of Medicine Department of Orthopaedics and Sports Medicine, University of Washington. Seattle, Washington
- Seattle Pacific University, Academic Administrators' Workshop. Seattle, Washington
- Bastyr University, Faculty Development Workshop, Kenmore, Washington
- Seattle University, Gonzaga University, and Central Washington University, Counseling Programs Faculty Development Workshop
- University of Montana, College of Health Professions and Biomedical Sciences, Faculty Staff Retreat
- University of Washington and the University of Washington Dental Service Foundation. Seattle, Washington
- University of Washington School of Medicine, Seattle, Washington

Selected National Associations

- Western Association for Counselor Education and Supervision, Pre-Conference Workshop, Sacramento, California, 2010.

- U.S. Army Medical Command 15th Annual Fall Faculty Development Conference, Madigan Army Medical Center, Joint Base Lewis McChord, Washington, 2009.
- Association of Surgical Technologists, Clinical and Educator Workshop, Orlando, Florida, 2009.
- Association of Surgical Technologists, Instructors Forum, San Diego, California, 2009.
- American Physical Therapy Association, Educational Leadership Conference, Phoenix, Arizona, 2008.
- New England Consortium of Academic Coordinators of Clinical Education in Physical Therapy, Clinical Faculty Institute, Lowell, Massachusetts, 2008.
- U.S. Army Medical Command 13th Annual Fall Faculty Development Conference, Madigan Army Medical Center, 2007.
- Federation of Associations of Regulatory Boards (FARB), Attorney Certification Seminar, Charleston, South Carolina, 2007.
- Association of American Medical Colleges, Professional Development Conference for Financial Aid and Student Records Administrators, Scottsdale, Arizona, 2007
- Association of American Medical Colleges, Annual Meeting, Seattle, Washington, 2006
- College of Health Deans and North East Regional Deans, New York City, New York, 2006.
- American Council of Colleges for Teacher Education (ACCTE) Annual Conference, Anaheim, California, 2006.
- Council of Colleges of Acupuncture and Oriental Medicine (CCAOM), CEOs and Presidents Workshop, Keystone, Colorado, 2006.
- Council of Colleges of Acupuncture and Oriental Medicine (CCAOM), Administrators, Deans, and Administrators Workshop, Keystone, Colorado, 2006.
- United Educators, 2005.
- American Association for Respiratory Care, Summer Forum, Vail Colorado, 2004.
- Group on Resident Affairs, Professional Development Meeting, Association of American Medical Colleges, Plenary Session Panel, Vancouver, Canada, 2004.
- Annual Session and Exposition. American Dental Association. Seattle, Washington, 2004.
- 2003 National Conference, Family Practice Workshop for Faculty and Staff of Family Practice Residency Program. Kansas City, Missouri, 2003.
- AAP Residency Director Course; Association of Academic Physiatrists, 38th Annual Meeting. Las Vegas, Nevada, 2002.
- 34th Dental Hygiene Program Directors' Conference, American Dental Education Association. Dana Point, California, 2001.
- Annual Conference of the National Association of College and University Attorneys. San Diego, California, 2001.
- American Association of Colleges for Teacher Education (AACTE). Dallas, Texas, 2001.

- Physical Therapists' National Clinical Education Conference. San Francisco, California, 2001.
- National Association EMS Educators and the Committee on Accreditation of Educational Programs for the Emergency Medical Services Professions. Phoenix, Arizona, 2000.
- Deans' Institute 2000, United States and Canada Dental School Deans. Annual Meeting, Banff, Alberta, Canada, 2000.
- Association of Academic Physiatrists. La Jolla, California, 2000.
- Accreditation Council for Graduate Medical Education. Chicago, Illinois, 2000.
- American Association of Colleges for Teacher Education (AACTE). Chicago, Illinois, 2000.
- Physical Therapy National Education Symposium, Florida Consortium of Clinical Educators. Orlando, Florida, 1999.
- American Association of Dental Schools. Vancouver, Canada, 1999.
- Annual National Conference, College and University Personnel Association. Seattle, Washington, 1999.
- National Conference for Nursing Education and Development. Bellevue, Washington, 1998.
- Association of American Medical Colleges (AAMC) Annual Meeting. New Orleans, Louisiana, 1998.
- American Society of Clinical Laboratory Science, Keynote Speaker, 1997 National Annual Clinical Laboratory Educators Conference. Seattle, Washington, 1997.
- National Meeting Physician Assistant Program Directors Senior Faculty Skills Workshop. Milwaukee, Wisconsin, 1997.
- National Military Medical Faculty Development Seminar, Madigan Medical Center. Tacoma, Washington, 1997.
- Associations of Professors of Gynecology and Obstetrics (APGO), Keynote Speaker, Faculty Development Seminar and Annual Conference. Amelia Island, Florida, 1996.
- Annual Fall Meeting Physical Therapy Association of Georgia. Atlanta, Georgia, 1995.
- Seventh National Physical Therapy Clinical Education Conference through State University of New York at Stony Brook. Buffalo, New York, 1995.
- Center for Governmental Responsibility, University of Florida College of Law. Amelia Island, Florida, 1995.
- Council of Graduate Schools in the United States 34th Annual Meeting. Seattle, Washington, 1994.
- International Society of Research Administrators. Seattle, Washington, 1994.
- American Association of Critical Care Nurses. Norfolk, Virginia, 1994.
- Critical Care Symposium, Association of Critical Care Nurses. Seattle, Washington, 1993.
- Annual Meeting American College of Osteopathic Internists. Fort Lauderdale, Florida, 1992.

- Seminar on Systems for Evaluating and Promoting Medical Students: An Institutional Management Approach. Association of American Medical Colleges. Santa Fe, New Mexico, 1991.
- Government Hospitals Special Interest Group, Twenty-fourth Annual Meeting. American Academy of Hospital Attorneys. Toronto, Canada, 1991.
- National Association of College and University Attorneys/American Association of Collegiate Registrars and Admissions Officers. Minneapolis, Minnesota, 1990.
- Teaching Hospitals Special Interest Group, Twenty-third Annual Meeting. Association of American Academy of Hospital Attorneys. San Diego, California, 1990.
- The Second International Conference on Health Law and Ethics, University of London. London, England, 1989.
- Ninth Annual Meeting of the Association for Surgical Education. Tampa, Florida, 1989.
- Joint Session of Annual Conferences of the Association of Anatomy Chairs, and the Association of Physiology Chairs, Hawks' Cay. Marathon, Florida, 1987.
- American Academy of Hospital Attorneys' Annual Conference. Boston, Massachusetts, 1987.
- Annual Conference of the National Association of College and University Attorneys, Section on Personnel Relations, Tenure and Retirement Programs, Baltimore, Maryland, 1986.
- International Conference on Health Law and Ethics, The American Society of Law and Medicine. Sydney, Australia, 1986.
- American College Health Association Sixtieth Annual Meeting. Seattle, Washington, 1982.

E. Selected Regional and State Presentations

- Harborview Medical Center Health Ethics Forum, Seattle, Washington, 2010.
- Physical Therapy Association of Washington, 2010 Spring Conference, Tacoma, Washington, 2010.
- Bastyr University, Faculty Development Workshop, Kenmore, Washington, 2010.
- Family Medicine Network Development Fellowship Workshop, Seattle, Washington, 2010.
- 15th Annual Madigan Fall Faculty Development Seminar, Addressing Trainee Unprofessional Behavior, Joint Base Lewis McChord, Washington, 2009.
- Carolina Clinical Education Consortium Conference, Greenville, South Carolina, 2009.
- Office of the Superintendent of Public Instruction, 12th Annual College/University/Educational Service Districts/OSPI Certification Conference, Chelan, Washington, 2008.
- Samuel Merritt College, Oakland California, Faculty Workshop, 2008.
- University of Washington, Division of Physical Therapy, Allied Health Programs, Statewide Faculty Development Workshop, 2008.
- Perkins Postsecondary Consortium, Downingtown, Pennsylvania, 2008.
- Pennsylvania College of Technology, Williamsport, Pennsylvania, 2008.

- Northampton Community College, Country Meadows Distinguished Lecture Series, Bethlehem, Pennsylvania, 2007.
- University of Washington Medical Center ICU Preceptors Training Workshops, 2007.
- New Jersey Council of Associate Degree Nursing Programs, Spring Nursing Faculty Workshop, South Brunswick, New Jersey, 2006.
- Office of the Superintendent of Public Instruction (OSPI) for the State of Washington, Annual Higher Education Assessment Workshop, SeaTac, Washington, 2006.
- Mercy College, Faculty Development Workshop, Tarrytown, New York, 2005.
- Northwest Nursing Education Institute, Plenary Session, Portland Oregon, 2005.
- Seattle Pacific University, Nursing Faculty Retreat Workshop, 2005.
- Health Care Compliance Association, Annual Pacific Northwest Area Conference. Seattle, Washington, 2004.
- Annual Meeting California Dental Hygiene Educators Association, Loma Linda University. Riverside, California, 2004.
- WWAMI (Washington Wyoming Alaska Montana Idaho) Family Medicine Network Directors. Seattle, Washington, 2004.
- California Dental Hygiene Educators Association, 2003 Meeting. Fresno, California, 2003.
- The Society of Michigan EMS Instructor Coordinators 45th Professional Development Conference. Grayling, Michigan, 2001.
- Washington Law School Foundation Continuing Legal Education. Seattle, Washington, 2000.
- Council on Nursing Education in Washington State. Spokane, Washington, 2000.
- North Georgia College and State University. Dahlonega, Georgia, 1999.
- Medical College of Ohio. Toledo, Ohio, 1999.
- Idaho Nurse Educator Conference, Coeur d'Alene, Idaho, 1999.
- Washington Association of Colleges of Teacher Education. Seattle, Washington, 1999.
- Medical College of Ohio. Toledo, Ohio, 1998.
- Southeast Athletic Trainers' Association. Atlanta, Georgia, 1998.
- Basic Washington Estate Planning Skills Program, Continuing Legal Education, University of Washington School of Law. Seattle, Washington, 1998.
- Carolina Education Consortium. Charlotte, North Carolina, 1998.
- Statewide Teleconference, Intercollegiate Center for Nursing Education. Spokane, Washington, 1998.
- Estate Planning Conference, University of Washington School of Law Continuing Legal Education. Seattle, Washington, 1997.
- Council on Nursing Education in Washington State, Lower Columbia College. Longview, Washington, 1997.
- Scientific Assembly of the Washington Academy of Family Physicians. Yakima, Washington, 1996.
- Health Care Panel, Thirty-eight Governor's Industrial Safety and Health Conference. Seattle, Washington, 1996.

- Continuing Legal Education, Attorney General's Office. Lacey, Washington, 1996.
- Continuing Legal Education, Washington Law School Foundation, University of Washington. Seattle, Washington, 1995.
- The Right to Die Conference, Continuing Legal Education International. Seattle, Washington, 1994.
- Annual Clinical Education Conference Sponsored by Physical Therapy Department of the University of Delaware, University of Maryland, Howard University and University of Maryland Eastern Shore. Newark, Delaware, 1994.
- Annual Meeting, Washington State Medical Association. Bellevue, Washington, 1991.
- Seattle Surgical Society. Seattle, Washington, 1987.

In addition to the foregoing, I have made annual or occasional presentations to the University of Washington Health Science Schools and Medical Centers on the following topics to the identified groups.

- Paramedic Liability to Paramedic Trainees.
- Medical Malpractice Issues to first and second year medical students.
- Liability issues to Schools and Departments for Faculty Rounds and Development Workshops, and to Residents, Students, and Medical Centers' staff.

SIGNIFICANT LITIGATION EXPERIENCE

a. Human Resource Issues

Amoss v. University of Washington, 40 Wn. App. 666, 700 P.2d 350 (1985). A University professor sought review of the denial of tenure. The court found there was no evidence that the professor was discriminated against in the final determination to deny tenure, that the University's internal review processes were followed and that the assignment of separate public attorneys from the same office to represent different public officers preserved the appearance of fairness.

Meyer v. University of Washington, et al., 105 Wn.2d 847, 719 P.2d 98 (1986). University faculty member brought 42 U.S.C. 1983 civil rights action against 26 colleagues personally and individually, and the University alleging that his colleagues improperly reprimanded him. His complaint was dismissed on summary judgment and the defendants were awarded \$50,000 in attorney fees. The professor appealed. State Supreme Court upheld trial court's decision and award of attorney fees holding that Meyer's claims were without merit and awarded attorney fees on the appeal. The dispute was settled with Meyer's resignation from tenured faculty at the University.

b. Constitutionality of State Statute

Hontz v. The State of Washington, 105 Wn.2d 302, 714 P.2d 1176 (1986). Persons who had been involuntarily held at an alcohol detoxification center brought a 42 U.S.C. 1983 civil rights action against the State and Harborview Medical Center challenging the constitutionality of the applicable state statute, RCW 70.96A. The court dismissed all claims against the State and Harborview and upheld the constitutionality of the statute.

c. Termination of Life Support

In re Hamlin, 102 Wn.2d 810, 689 P.2d 1372 (1984). Harborview Medical Center sought permission to discontinue life support systems for a patient with no neurological activity above his brain stem and who had no family. The court authorized the withdrawal of care and set forth the standards and procedures for future cases.

d. Reverse Discrimination/Medical School Admissions

McDonald v. Hogness, 92 Wn.2d 431, 598 P.2d 707 (1979), cert. denied, McDonald v. Gerberding, 445 U.S. 962, 100 S. Ct. 1650, 64 L. Ed. 238 (1980). This was a reverse discrimination suit brought by an unsuccessful applicant to the University of Washington School of Medicine who sought to be admitted to the School and to recover damages. The court upheld the University's approach to medical school admissions and the School of Medicine's applicant interview process.

e. Historic Preservation

Seattle Community College District v. City of Seattle. This case involved the proposed demolition of the old Broadway High School building, which, though seismically unsafe, was designated for historic preservation. The demolition was necessary for the construction of a new campus structure for Seattle Central Community College. The college prevailed in King County Superior Court, Seattle, Washington. Part of the old building was preserved with a green space and the new facility was constructed. It is now the centerpiece of a vibrant mixed-use neighborhood in Central Seattle. (Unreported opinion)

f. Academic Dismissal

Managan v. Board of Regents of the University of Washington. A fifth year medical student was dismissed for poor academic performance. After a seven-day trial, the court upheld the Medical School's dismissal of the student. The court suggested that perhaps the only unfair aspect of the case was that the student was not dismissed sooner. King County Superior Court, Seattle, Washington (Unreported opinion)

PRISCILLA (POLLY) J. MOSS
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Atwater, Ohio 44201
330-936-2575 (cell)
polmoss@yahoo.com

Summary Statement of Qualifications

- ◁ Effective in collaborative work in identifying and implementing strategic initiatives in working directly with university/college presidents and their leadership teams and in project management;
- ◁ Possess specialized knowledge and experience in all areas of student services and student affairs, teaching, curriculum development, academic advising, budget, supervision, research, student conduct and legal issues; evaluation and measurement, admissions and recruitment, enrollment management, registrar, financial aid administration, alumni affairs, IT systems development and outreach to all constituents;
- ◁ Success in leadership and college administration as assistant dean, student affairs and admissions (functioning as chief student affairs officer);
- ◁ Involved in workforce development initiatives including career pathways with area workforce development boards and higher education institutions;
- ◁ Possess a masters degree in education administration;
- ◁ Current adjunct faculty status at Northeast Ohio Medical University, Rootstown, OH

EDUCATION

Kent State University, Kent, Ohio, 1995 to 2001
Coursework toward Ph.D. Program in Higher Education Administration
◁ Emphasis in Education Law
Master's Degree in Higher Education Administration, May 1990

Ohio University, Athens, Ohio 1977-1981
Bachelor of Science Degree in Communications, June 1981
Major: Organizational Communications
Minors: Management and Psychology
◁ Major academic area focus on managerial approach to working with human communications and resources in an organization
◁ Minor academic areas include Personnel Management, Administrative Personnel, Recruitment and Placement, Industrial Relations, Leadership Motivation, Business Communications, Organizational Psychology, and Social Psychology

HONORS AND AWARDS

- ◁ Member of the Lorain County Community College Speed-to-Market Accelerator initiative and finalist for 2014 Team NEO's Economic Development Plus Award in Regionalism & Cross Border Collaboration

- ◁ Innovation Alliance - Receipt of 2012 Team NEO Award for Regionalism and Cross-Border Collaboration
- ◁ Northeastern Ohio Universities Colleges of Medicine and Pharmacy Gender Equity Award from Class of 2009, May, 2009
- ◁ Northeastern Ohio Universities Colleges of Medicine and Pharmacy Dean's Award presented to Department of Student Affairs and Admissions, August, 2007
- ◁ Alpha Omega Alpha Recognition Award (national) for work on behalf of the students and chapter at Northeastern Ohio Universities College of Medicine, 2007
- ◁ Graduate of Northeastern Ohio Universities College of Medicine Fellowship in Academic Medicine program, April, 2007
- ◁ Northeastern Ohio Universities College of Medicine Olson-Blair Award for Administrative Excellence for demonstrating outstanding administrative accomplishments including the ability to supervise, make critical judgments and contributing to the betterment of the College, 1999
- ◁ Northeastern Ohio Universities College of Medicine President and Dean's Award for having played a significant role in the growth and development of the College of Medicine's academic program and providing outstanding guidance and leadership, 1999
- ◁ Outstanding Service To Class Award, 2004, 1999, 1996, 1995, 1989, 1987

WORK EXPERIENCE

Lorain County Community College, Lorain, OH (September, 2014-February, 2016)

Project Coordinator, TAACCCT Grant and Speed-to-Market Accelerator (part-time)

- ◁ The Speed-to-Market Accelerator program provides a comprehensive set of services to help cluster members accelerate the commercialization of products and services through workforce development services, manufacturing scale-up services, market development services and one-on-one services
- ◁ Responsible for the Talent Consortium members, meetings, programs; Talent Consortium is a forum to exchange best practices and foster collaboration and innovation among higher education and workforce development professionals across a 12-county region
- ◁ Develop networking and programming activities to connect students, incumbent workers and the unemployed to educational and training programs to fill the workforce needs of cluster companies

The University of Akron, Stark State College, Lorain County Community College (March, 2011 through June, 2014)

Project Director, Innovation Alliance

- ◁ Reporting to the institutional presidents, responsible for implementing the presidents' vision for an unprecedented alliance to accelerate educational efficiency, knowledge creation and economic development within the Innovation Corridor
- ◁ Develop mission, vision, goals, objectives and strategic plan for the Innovation Alliance with focus on shared services, new and emerging technologies for degree creation and degree pathways, regional STEM initiatives and entrepreneurial support, workforce development and economic development

- ◁ Core team member in the Speed-to-Market Accelerator initiative to get under/unemployed workers trained and hired in technical positions, create career pathways
- ◁ Reach out to regional academic, government, business and industry, community organizations for collaboration on initiatives to promote economic development and the innovation ecosystem and represent the Innovation Alliance and institutional partners
- ◁ Integrate work as member of The University of Akron Engagement Council, Stark State College's Center for Business & Entrepreneurship Center Advisory Committee, Lorain County Community College Vision 2.0 Council, Northeast Ohio RITE (Regional IT Engagement) Board, ReachHigher, Ohio Skills Bank, Efficient Gov, STEM Collaborative, Shared Services Steering Board

American Physical Therapy Association, Alexandria, VA (October, 2011-present)
Educational Consultant/Content Expert/Faculty

- ◁ Service as content expert/faculty for the Education Leadership Institute's Student Affairs learning module
- ◁ Create learning objectives, course content, testing and all related course materials
- ◁ Monitor student discussion and questions and hold virtual office hours

Northeast Ohio Medical University, Rootstown, OH (June, 1992 to present)
Adjunct Instructor, Family and Community Medicine

- ◁ Instructor in the following courses: Prologue; M3 Clinical Prologue; M4 Epilogue; M4 Capstone; Interviewing Skills; M3 Intersessions (2); Gender, Media and Medicine; On Professionalism; Medical Problems; Infectious Disease; Doctoring
- ◁ Taping supervisor for Interviewing Skills

Northeast Ohio Medical University, Rootstown, OH (February, 1985 to November, 2010)

- 2 **Assistant Dean, Student Affairs and Admissions**
- 2 **Assistant Dean, Student Affairs and Director, Office of Professional Development**
- 2 **Assistant Dean for Academic Affairs**
- 2 **Director, Student Services and Registrar/Financial Aid**
- 2 **Administrative Assistant**

- ◁ Received four promotions during tenure, each with increasing responsibility leading to oversight of all student affairs-related functions (admissions, recruitment, financial aid, counseling and advising, student judicial affairs, student academic review, registrar and registration, orientation, student health and wellness, residency placement and career services, student activities and organizations)
- ◁ Provide leadership and assists in the coordination, integration and evaluation of the decentralized education program
- ◁ Responsible for the direction of the admissions program by working with the director to evaluate strategies and work related to the recruitment and admission of medical students (through the BS/MD, direct entry and advanced standing programs), pharmacy students and College of Graduate Studies doctoral and

masters students

- < Oversee the work of the Medicine Admissions Committee and subcommittees and Pharmacy Admissions Committee
- < Provide leadership and supervision for the Offices of Admissions and Student Services, Career Development and Advising in an effort to promote the articulation of the educational program, student assessment, student support services, student diversity, student organizations, government and leadership, and all advising activities related to education (academic, career, personal, financial)
- < Provide oversight, administer and serve as member of all three Committees on Academic and Professional Progress
- < Member of Educational Leadership that meets weekly with College of Medicine president/dean and College of Pharmacy dean to strategize, coordinate activities and identify issues and resolution to interdisciplinary educational approach to education and the program
- < Member or resource person to the following committees and groups: Diversity Council, College of Graduate Studies Dean's Transition Team and Steering Committee, Academic Quality and Outcomes, Curriculum Development and Implementation, Information and Academic Technology, Olson-Blair Award, Academic Council, Curriculum Transition Management Committee; Curriculum Management Task Force, M1/M2, M3 Curriculum Subcommittees; Phase 1 Promotion Criteria Task Force; Records Control and Retention; Student Aid and Awards; Student Health and Counseling; Effectiveness Council; Academic Planning Team; Admissions Committees; Faculty Development and Advising; Biomedical Sciences Graduate Education Task Force; Longitudinal Course Team; Assessment Team; Graduate Program Review Committee

SAMPLE OF RESEARCH, GRANTS AND PUBLICATIONS

- < Factors Predicting Success of Students in the BS/MD Program, IRB-approved study completed and closed 2009.
- < A Correlation of Pharmacy Student Matriculating Student Questionnaire Data with Academic Performance in Pharmacy School, IRB-approved study completed and closed 2008.
- < A Comparison of Medical Student and Pharmacy Student Matriculating Student Questionnaire Data, IRB-approved study completed and closed 2008.
- < Student Awareness and Satisfaction with Career Development Activities, IRB-approved study completed and closed 2007.
- < The Undergraduate Experience of Students in a Combined BS/MD Degree Program, IRB – approved study completed and closed August, 2007.
- < Is There a Relationship Between Students' Academic Performance and Their Ability to Manage Their Finances? IRB-approved study completed and closed 2007.
- < Awarded \$60,000 from the Medical Education Network Teaching Ohio Region III grant for Professional Development Electronic Portfolios project, 2001.

SAMPLE OF PROFESSIONAL ASSOCIATION PRESENTATIONS

- < The EfficientGov Network – Feasibility Study with the Stark Leadership Academy, March,

2014

- < “Threat Assessment Teams: Creating a Climate of Safety” Association of American Medical Colleges Annual Meeting, Boston, MA, November, 2009.
- < “Using the Multiple Mini Interview for BSMD Selection” Association of American Medical Colleges Annual Meeting BA-MD Group, Boston, MA, November, 2009.
- < Kasmer RJ, McGory RW, Moss P, Allen DD. Use of a Holistic Review Process to Evaluate College of Pharmacy Applicants. American Association of Colleges of Pharmacy Annual Meeting, poster presentation, Boston, MA. July 19, 2009.
- < “Medical School Performance and Residency Choice: A Comparison of BSMD Entrants and Students From Other Admissions Pathways” Association of American Medical Colleges Annual Meeting BA-MD Group, San Antonio, TX, November, 2008.
- < “The Image of Women in Popular Culture” Pokorny, A., Moss, P., International Conference on Education, Honolulu, HI, January, 2008.
- < “The Undergraduate Experience for Students in a Combined BS/MD Program” Moss, P., Pokorny, A., Cassetty, M., Snyder, C., Kokinova, M., Association of American Medical Colleges Annual Meeting, poster presentation, Washington, DC, November, 2007.
- < “Is There a Relationship Between Students’ Academic Performance and Their Ability to Manage Their Finances?” Cassetty, M., Moss, P., Kokinova, M., Association of American Medical Colleges Annual Meeting, poster presentation, Washington, DC, November, 2007.
- < “Pandemic Influenza Preparedness: Institutional Planning, Strategies, and Challenges” Moss, P., Penn, M., Loyet, D., Association of American Medical Colleges Annual Meeting, poster presentation, Washington, DC, November, 2007.
- < “Student Initiated and Designed Clinical Auction Rotations System” Albertson, E., Ferre, J., Moss, P., Snyder, C., Association of American Medical Colleges Annual Meeting, poster presentation, Washington, DC, November, 2007.

PROFESSIONAL AFFILIATIONS - PAST AND PRESENT

- < Education Law Association
- < Association of American Medical Colleges
 - § Delegate-at-Large, CGSA Steering Committee
 - § Annual Meeting Program Proposal Reviewer, 2009
 - § Member Medical Student Performance Evaluation Advisory Committee
 - § Group on Student Affairs
 - § Group on Educational Affairs
 - § Group on Information Resources
- < Association for Student Judicial Affairs
 - § Annual Conference Program Proposal Reviewer, 2009
 - § Member, Conference Evaluations Committee
- < Center for Academic Integrity
- < National Association of Student Financial Aid Administrators
 - § Member, Federal Aid Programs Response Network
- < National Association of Academic Affairs Administrators
- < Midwest Association of Student Financial Aid Administrators
 - § Chair, Professional School Financial Aid Committee

- ◁ Ohio Association of Student Financial Aid Administrators
 - § Chair, High School/College Relations Committee
 - § Member, Professional Judgment Committee
 - § Member, Newsletter Committee
 - § Member, Membership Committee
 - § Presenter at various state conferences and workshops
- ◁ American Association of Collegiate Registrars and Admissions Officers
- ◁ Association of Records Managers and Administrators, Inc.
 - § Akron Canton Chapter Student Evaluation Committee
- ◁ Ohio Association of Collegiate Registrars and Admissions Officers
 - § Chair, Professional Development Committee
 - § Member, Program Committee
- ◁ Ohio Association of College Admissions Counselors
- ◁ National Association of Student Personnel Administrators
- ◁ Ohio College Personnel Association
 - § Member, Cultural Diversity Committee

INTERESTS AND ACTIVITIES

- ◁ Owner/ Instructor –Forever Fitness
- ◁ AFAA Certified Group Fitness Instructor
- ◁ Certified SilverSneakers FLEX instructor
- ◁ Running, biking, hiking, scuba diving, downhill skiing, reading, paddle boarding
- ◁ Waterloo Local Schools Grant Committee, Athletic and Band Boosters
- ◁ Advent Lutheran Church Council and Children’s Ministry Committee
- ◁ Girls on the Run volunteer, Stark County, OH
- ◁ American Red Cross Rape Crisis Advocate Volunteer
- ◁ Volunteer activities for American Cancer Society

RESUME

ROBERT THOMAS MUNDHENK
Consultant in Higher Education Assessment
3790 Bridgeway Lakes Drive
West Sacramento, CA 95691

ACADEMIC BACKGROUND

- 1967 B.A. English University of Notre Dame
- 1968 M.A. English University of California, Los Angeles
- 1971 Ph.D. English University of California, Los Angeles
Dissertation: *Jonsonian Humours Comedy*
Director: Earl Miner
- 1987 Institute for Educational Management, Harvard University

MOST RECENT POSITIONS (RETIRED IN 2015)

- 2005-2015
Senior Scholar, The Higher Learning Commission—design and oversight of the Commission’s assessment training as well as the design and implementation of its Academy for Student Persistence and Completion
- 2009-2012
Co-Founder and Board President, Association for the Assessment of Learning in Higher Education
- 2012-2013
Past President, Association for the Assessment of Learning in Higher Education

PREVIOUS ASSESSMENT POSITIONS

- 2005-present
Consultant in Higher Education Assessment for:
American Council on Education—training in assessing internationalization efforts in two FIPSE-funded projects, as well as

workshops at two participant institutions

American Association of Community Colleges—homeland security white paper

NASPA—designed annual Assessment and Retention Conference

The Higher Learning Commission of the North Central Association—Senior Scholar. Chief mentor and designer, quarterly assessment workshops, Academy workshops and roundtables.
Design team, Academy for Assessment of Student Learning
Chief designer, Academy on Persistence and Retention

Blackboard, Inc—design of new Outcomes system

Various colleges and universities, including the University of Hawaii/Kapi'olani Community College, Arizona Western College, Texas A&M University, Northern Virginia Community College, Iowa Independent College Coordinating Board, Colorado Community Colleges, University of Wisconsin-Superior, University of Missouri-Kansas City, Macomb Community College, Rosalind Franklin University, and Trinidad State University

2004-05 Director of Assessment and Senior Scholar
American Association for Higher Education

EARLIER EXPERIENCE IN HIGHER EDUCATION

Teaching Experience

- 1971-77 Assistant Professor of English
Fordham University
Bronx, New York
Taught courses in composition, introduction to literature, Drama to 1642, John Milton, Restoration Drama, Contemporary Drama, Modern British Poetry, among others, as well as seminars in Comedy, Tragedy, and Satire.
- 1977-80 Assistant Professor of English
Northampton Community College
Bethlehem, Pennsylvania
Taught courses in composition, introduction to literature, Shakespeare, Contemporary Literature, British Literature I and II.

- 1988 Adjunct Assistant Professor of English
Lehigh University
Bethlehem, Pennsylvania
Taught Introduction to Film
- 1992-2004 Professor of English
Northampton Community College
Bethlehem, Pennsylvania
See above teaching assignments. Also introduced network-based composition instruction and information literacy into composition curriculum.
- 2007 Adjunct Professor of English
Lehigh University
Bethlehem, PA
Taught English 331: Milton

Administrative Experience

- 1980 Dean, Humanities and Social Sciences
Northampton Community College
Bethlehem, Pennsylvania
- 1981-92 Vice-President for Academic Affairs
Northampton Community College
Bethlehem, Pennsylvania
- 2002-2004 Director of Assessment
Northampton Community College
Bethlehem, Pennsylvania

PUBLICATIONS AND PRESENTATIONS

- "From Concord to Dissent" (review), THOUGHT, February 1975
- "Milton's Two Samsons," Modern Language Association Annual Convention,
New York, December 1976
- "The Contexts of *Comus*," Modern Language Association Annual Convention,
Chicago, 1977
- "The Medical Basis for Jonson's Humours," Modern Language Association
Annual Convention, Chicago, 1977

Contact: A Guide to Writing Skills (Boston: Houghton Mifflin, 1978) (with W.R. Siebenschuh)

Chair, Renaissance Neoplatonism Session, Modern Language Association Annual Convention, New York, 1978

"Basic English: Testing That Works," Conference on College Composition and Communication Regional, Pittsburgh, Pennsylvania, 1979

"Coordinating High School English and College Composition," National Council of Teachers of English National Conference, San Francisco, 1979

"The Rhetoric of Television" (review), College Composition and Communication, February 1980

"Testing and Articulation: A Model for Cooperation in Teaching Writing," Middle States Association Annual Meeting, Philadelphia, 1980

"Dead Policeman: Teaching Connotation," Potpourri, Spring 1981

"Progressive Community College Involvement in Economic Development," American Association for Career Education National Conference, Louisville, KY, 1983

"Metamorphic Allusion: Milton's Strategy of Argument in Three Early Poems," Second International Milton Symposium, Cambridge University, Cambridge, England, 1983

"Mutual Benefits in an Industry Education Partnership," National Issues in Higher Education Conference: Partnerships for Employee Training, Fort Worth, TX, 1983

"Mutual Benefits in an Industry Education Partnership," Issues in Higher Education XI (1984)

"Hydraulic Training through Industry/Education Cooperation," Vocational Education, January 1984

"A Catalytic Model for Economic Development," National Council for Occupational Education Annual Conference, Orlando, 1987

"Community Colleges and Economic Development," Journal of Studies in Technical Careers, X, 2 (Spring 1988)

NCOE Newsletter (quarterly), writer and editor, 1987-89

Editor, "The Community College Role in Economic Development" (NCOE Monograph, 1988)

Panelist, "The Forgotten Half: Non-College Youth in America," Pennsylvania State Vocational Education Conference, June 1988

"Directions in Occupational Education," Maryland Academic Deans Conference, March 1990

Panelist, "Tech Prep Models," CORD Conference on Tech Prep, Hagerstown, MD, October 1990

Panelist, Information Literacy Workshop, Middle States Association of Colleges and Schools, April 1991

"The Internationalization of Occupational Education," AACC Annual Conference, Portland 1993

"Accreditation of Business Programs," AACC Annual Conference, Portland 1993

"International Training Systems," NCOE Annual Conference, Atlanta 1993

"Reauthorization of the Perkins Act: Issues for Community Colleges," NCOE Annual Conference, Atlanta 1993

"Occupational Education for a Diverse New Workforce," NCOE Annual Conference, Atlanta 1993

"Preparing a Diverse Workforce for the Twenty-first Century," NCOE Monograph, 1994

"Workforce Development: What Community Colleges Can Do," NCOE Monograph, 1994

Editor, Tech Prep Round Table Proceedings, AACC 1994

Occasional quarterly legislative updates, NCOE *Workplace*, 1997-2000

Criteria for Excellence in Associate in Applied Science Degree Programs, 2000

"Defining the AAS Degree," AACC Annual Conference, Washington 2000

"The Trouble with Outcomes," *Community College Journal*, June-July 2000,

12-15

“Institutional Effectiveness and UI Data,” AACC White Paper and website publication, July 2000

“Defining Quality in Technical Education” (with James Everett, Mary Gershwin, Homer Hayes, and James Jacobs). Commissioned paper for U.S. Department of Education, 2002.

“How Can Colleges Prove They’re Doing Their Jobs? We Need an Honest Conversation” (with Clara Lovett). *The Chronicle of Higher Education*, 3 September 2004, B6-7.

“Communities of Assessment.” *Change* (November-December 2004).

“Weathering the Storm: An Action Agenda for Community Colleges.” AACC Annual Conference, 2005.

“Weathering the Storm: An AAHE Webcast.” May 11, 2005.

“Assessment in the Context of Accreditation” *Assessment of Student Learning in Business Schools*, eds. Kathryn Martell and Thomas Calderon. AIR and AACSB, 2005.

“Whither the Assessment Movement?” Middle States Commission on Higher Education Assessment Conference, September 2005.

“Embracing Accountability.” *American Academic* 2:1 (March 2006), 39-54.

First Responders: Community Colleges on the Front Line of Security. Washington, D.C.: American Association of Community Colleges Press, 2006.

“Ethical Issues in Assessment” HLC Annual Conference 2010

“Helping Institutions to Assess General Education and Institutional Effectiveness” HLC Annual Conference 2010

Various invited presentations at Higher Learning Commission Annual Meetings, 2007- present.

ACTIVITIES IN OCCUPATIONAL AND VOCATIONAL EDUCATION

National Council for Occupational Education

- Board of Directors 1984-1993, 1997-2000
- Treasurer 1988-89
- Vice President for Programs 1989-90
- President 1991-92
- Vice President for Legislation 1997-2000
- Co-chair, Criteria for AAS Degrees Task Force, 1998-2000

American Association of Community Colleges

- Keeping America Working Awards Panel 1986-1990
- Tech Prep/Associate Degree Awards Panel 1991- 1998
- Member, Special Task Force on Accreditation of Business Programs 1990-1993
- Sabbatical work (1993-94): developed white paper on Perkins reauthorization; reviewed legislative drafts, drafted positions, and advised on testimony for the Reemployment Act and the School-to-Work Transition Act; edited proceedings of a tech prep roundtable
- Joint Commission on Legislation 1994-95
- Member and Recorder, Round Table on Outcomes Reporting and UI Data, 2000

Pennsylvania Department of Education

- Perkins Committee of Practitioners 1990-92
- Standards and Measures Task Force 1990-91

Maryland Department of Education

- Testimony on implementation of Associate in Applied Sciences degree, January 1991

U.S. Department of Education

- Invited participant, "The Quality Connection: The School-to-Work Transition," DOL/DOE joint conference, May 1990
Consultant/participant in workshop on professional preparation and development of occupational educators, September 1990
- Member of U.S. Delegation and program session leader, joint United States/European Community conference on occupational education, Noordwijk, The Netherlands, 1992
- Consultant/participant in workshop on defining post-

secondary vocational education, May 2000

Association of Collegiate Business Schools and Programs

- Founding Commissioner, 1990-91
- Accreditation Standards Committee, 1990-91

National Center for Research in Vocational Education

- Reviewer, 1990-92

Lehigh University Educational Partnership

- Instructor/facilitator, seminar on the introduction of technology and technological literacy in the secondary curriculum 1992

AWARDS AND HONORS

Danforth Fellow, 1977

NCOE Board Service Award 1994

Folger Institute Fellow, Folger Shakespeare Library, 1994

Christensen Excellence in Teaching Award (Northampton CC) 1999

Northampton Community College Alumni Educator Award 2004

OTHER PROFESSIONAL ACTIVITIES AND MEMBERSHIPS

Modern Language Association

Milton Society of America

National Council of Teachers of English

Community College Humanities Association

Pennsylvania Association of Developmental Educators

Board of Directors 1979-81

Pennsylvania Chief Academic Officers

Secretary, 1986-88

Chair, 1988-90

Association for the Assessment of Learning in Higher Education

CURRICULUM VITAE

April 2016

NAME: Charlotte Brasic Royeen, PhD, OTR/L, FAOTA

BUSINESS ADDRESS: Rush University Medical Center
College of Health Sciences
Armor Academic Center
600 S Paulina Street
Suite 1001
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LICENSURE/CERTIFICATION: NBCOT # AA341297
Missouri License # 2004034943 (undergoing renewal)
SIPT Certification # 5004
AOTA # 341297

EDUCATION:

1982-1986 **Virginia Polytechnic Institute and State University**
Blacksburg, Virginia
Doctor of Philosophy

Area of concentration was educational research and evaluation as well as statistics with a minor in management. Dissertation topic was entitled *A Comparison of Parametric Versus Nonparametric Statistics in Occupational Therapy Literature*. Areas of study included: intermediate and advanced statistics, regression, factor analysis, survey design, qualitative methods, advanced research design, ethnography, program and policy valuation, nonparametric statistics, SPSS, and SAS; individual and organizational behavior and principles of management.

1978-1980 **Washington University School of Medicine**
St. Louis, Missouri
Master of Science in Occupational Therapy
Graduate Teaching Fellow (Funded by U.S. Department of Maternal and Child Health)

Areas of concentration in occupational therapy, research and neuroscience.

1973-1976 **Tufts University**
Boston, Massachusetts
Bachelor of Science: *Summa Cum Laude*

Areas of concentration in occupational therapy and anatomy.

1971-1973

**Ohio University
Athens, Ohio
Undergraduate Student**

Areas of concentration in psychology and fine arts painting.

PROFESSIONAL EXPERIENCE:

June 2015 to Present Dean of the College of Health Sciences and Professor of Occupational Therapy (with tenure) at Rush University Medical Center, Amour Academic Center, 600 S. Paulina St., 1006 AAC, Chicago, IL 60612
[Charlotte L Royeen@Rush.edu](mailto:Charlotte.L.Royeen@Rush.edu)
 312.942.7120 Tel.
 312.942.2100 Fax.

Provided leadership for the College of Health Science of Rush University Medical Center that includes a complex array of undergraduate and graduate programs within the following departments or programs: (1) audiology, (2) clinical nutrition, (3) doctor of philosophy in health sciences, (4) ethics certificate, (5) BS in health sciences, (6) health systems management, (7) imaging sciences, (8) medical laboratory science, (9) medical physics residency, (10) occupational therapy, (11) perfusion technology, (12) physician assistant studies, (13) research administration, (14) respiratory care, (15) specialist in blood bank certificate, (16) clinical laboratory management program, (17) speech-language pathology program, and (18) vascular ultrasound. Worked with approximately 100 faculty and staff, and approximately 500 students in the development of program operations, sponsored research and scholarship, grant activities and solicitation of external support. Lead organizational change from quarters to semesters requiring curricular redesign design for quality and excellence across all programs. Overall program revenue of approximately one and a half million. RUMC integrates hospital operations with the university that results in the teacher/practitioner/scholar model requiring effective integration with ongoing operations of medical care. Serve as a member of Senior Leadership for the enterprise and responsible to the Provost.

2013 Spring Sabbatical

Fall 2013-

May 2015

**Saint Louis University
Edward and Margaret Doisy College of Health Sciences
St. Louis, Missouri
Professor in Occupational Therapy and Occupational Science**

Responsible for research courses in the masters of occupational therapy curriculum (research 1, 2, and 3). Also taught an on line class to freshman and sophomore studying abroad on human growth and development. Continued service and scholarship work. Average score of 4 plus (on 5 point scale) on all course evaluations from students. Serve as mentor to 17 master's students and four students on probation for academic issues. Continued in scholarly endeavors. Taught graduate level MOT 550 Research Seminar 2 and co-taught sophomore level OCS 257 Human

Growth and Development (on-line across US and Spain). Taught two graduate level courses MOT 546 geriatrics and MOT 656 Research Seminar 3. Student course evaluations averaged 3.85 and 4.85 on a five point scale, respectively. Mentored 19 graduated students in the occupational therapy program. Continued national level service to the Commission on Dental Accreditation and the Commission on Physical Therapist Accreditation. Continued international service as journal peer reviewer for *Journal of Occupational Science* and *Occupational Therapy International*

Conceptualized, operationalized and successfully completed an innovative undergraduate course “Neuroscience Literacy: The brain in activities of daily life” for senior level students in the Bachelor of Science, Health Sciences program in the college. In addition to traditional lecture format, active learning strategies of presentation, food choice with neuroscience implications, and group activities were integrated into the course, culminating in a final creative project. This was the first undergraduate course I had taught in nearly 30 years. Student review revealed: Effectively integrated into the Department of Occupational Science and Occupational Therapy as a positively-orientated, team player. Sponsored a senior level student’s honor project over the summer of 2012 (off contract) and the over the fall of 2013.

Service: Provided on-going service activities as a Commissioner on the Accreditation Councils of the American Dental Association and the American Physical Therapy Association; service to the American Occupational Therapy Association on the Future of Occupational Therapy Education.; and national service as Treasurer for the Society for the Study of Occupation: USA. Provided national expertise as chair of external review committee regarding the development of an occupational therapy doctoral program for the Commonwealth of Massachusetts. Provided nationally recognized expertise as one of three authors of educational residency module for the American Physical Therapy Association. Continued role as editorial board member for *Occupational Therapy International*. Provided specialty guest lecturers in occupational therapy courses. Participated in university service on the Tree committee, in preparation for the university submission for national certification.

Scholarship: *Continued in role of active scholar.* Published an article in one of my areas of interest, ethics, that was national in scope entitled, “Seven step for enriching ethics in academic leadership” in *Academic Leader* (November, 2012, Vol. 28, No. 11, pages 4, 5, and 6).

2008-2012

Saint Louis University

Edward and Margaret Doisy College of Health Sciences

St. Louis, Missouri

Dean

Professor in Occupational Therapy and Occupational Science

Developed new programs within past four years that included masters of magnetic imaging, masters of cross training in radiation therapeutics, as well as magnetic imaging and emerging technologies. As of June 1, 2008, School of Nursing assumed stand alone status as Doisy College of Health Sciences implemented new programs in athletic training (MS), cytotechnology (BS), radiation therapy (BS), an expanded program in dietetic internship (preMS) and a master of science in health informatics and information management. Implemented a new and innovative BS in Health Sciences which has brought in undergraduate student profiles of 28 ACT and 3.8 GPA. Achieved Board of Trustees approval for new research-based, integrated Master of Science in health sciences, a degree for educating faculty of the future. Planned to phase in PhD

based upon success of MS. Developed the college from approximately 800 students in 2003 to nearly 1600 students in 2012, making the college the second largest unit in the university, second only to arts and sciences. Oversaw four associate deans, one business manager, three administrative assistants, one grants specialist, a statistician and nearly 90 faculty and approximately 55 staff. Achieved annual revenues of \$32,000,000 with an average of \$511,290 in annual grant funding. All thirteen professional programs are fully accredited and student pass rates are from 95-100%. Three months post-graduation, employment history of students is 100%. As of 2012, new strategic priority areas are development, public relations, extramural funding and shared governance. Completed strategic plan for the college. At nearly a decade, longest serving dean at the university. Responsible to the Vice President of Academic Affairs.

2005-2008

**Saint Louis University
Edward and Margaret Doisy College of Health Sciences
St. Louis, Missouri
Dean
Professor in Occupational Therapy and Occupational Science**

Appointed by the President to serve as leader for two formerly independent schools (School of Allied Health and School of Nursing). The merged entity, Doisy College of Health Sciences, has approximately 100 faculty and over 1500 students, creating the third largest of Saint Louis University's Schools and Colleges. Coordinated and served as liaison with all service departments of the university. Responsible for fundraising, alumni relations, new academic programs, public relations as well as community liaison work, scholarship and overall financial and administrative management. Facilitated setting strategic initiative for and implementation of interprofessional education and research. Received monies in 2006 from the President's Opportunity Fund to support interprofessional education initiatives within the college. Since 2005, oversaw operations of an innovative college-based cafeteria run by nutrition and dietetics and based upon sustainable food systems and environmental ecology. Assumed, as of fall 2006, teaching responsibility and oversight of four master's projects in occupational therapy. Responsible to the Vice President of Health Sciences and the President.

2003-2004

**Saint Louis University
Edward and Margaret Doisy School of Allied Health
Professions
St. Louis, Missouri
Dean
Professor in Occupational Therapy and Occupational Science**

Provided leadership for the School which includes all undergraduate and graduate programs within the following departments: Clinical Laboratory Science, Health Information Management, Nuclear Medicine Technology, Nutrition and Dietetics, Occupational Science and Occupational Therapy, Physical Therapy, and Physician Assistant. Fostered interprofessional cooperation within the context of shared governance and work directly with faculty to establish and implement goals and direction for the School and its departments and programs. Worked with faculty, staff, and students in the development of sponsored research and scholarship, grant activities and solicitation of external support. Responsible to the Provost.

Responsibilities included serving as research and scholarship facilitator and coordinator. Responsibilities also included chairing of grant review committee, faculty development committee, and serving on search committees. Facilitated interdepartmental coordination between University grants office and interdisciplinary research and training activities across schools. Served as instructor of record in doctoral level courses in occupational therapy and physical therapy. Provided administrative support to the Dean as needed.

1992-1996 **Shenandoah University**
Winchester, Virginia
Founding Chair and Professor, Program in Occupational Therapy

Conceptualized, developed and implemented a new educational program to train occupational therapists at the master's level. Developed innovative curriculum using problem-based learning—the first occupational therapy program in the US to be so grounded. Recruited faculty and students. Facilitated faculty development. Developed, implemented and supervised an infrastructure of research for students and faculty. Participated on university committees. Provided budget oversight. Accreditation status: Program accredited with eleven strengths and no areas of noncompliance.

1988-1992 **Independent Contractor in Research and Therapy Services**
Great Falls, Virginia

Provided expertise and technical assistance to organizations at the local, regional, national and international levels in the areas of habilitation, research and evaluation, testing, program and policy development as well as personnel preparation and training. Selected contracts were:

- Editor for a new and innovative project to develop self study materials for occupational therapists and other professionals. Conceptualized topic areas, developed curriculum, recruited and convened advisory board members, contacted and developed authors, served as content editor, and managed overall project development, implementation, and evaluation as well as served as primary content oriented quality control person. This has proved to be one of the most successful continuing education program offered by this or any other allied health organization. Contractor: American Occupational Therapy Association, Bethesda, MD. The series won The Innovative Programs in Continuing Education Award from the American Society of Association Executives in 1991.
- Technical assistance in research to national organizations such as WESTAT, Inc. (formerly Decision Resources, Inc), Ohio State University, National Institutes of Health, etc. Senior Research Associate Laurie Center for Infants and Children, Rockville, Maryland. Provided research consultation to staff and assist in proposal development. Grant coauthor and Project Co-director for three year, field-initiated, programmatic research effort funded by the National Institute of Disability Rehabilitation Research, U.S. Department of Education, to assess the collaborative process mandated by Public Law 94-457. Funded at approximately one half million dollars.
- Research Consultant to the Neurodevelopmental Treatment Association, Inc., Chicago, Illinois. Conducted a research synthesis of neurodevelopmental treatment studies and

generated research recommendations for the organization. Provided individual research consultation with members.

1988

**U.S. Department of Education
Research Projects and Development Branch
Division of Innovation and Development
Office of Special Education Programs
Washington D.C.
Acting Chief**

Responsible for management and oversight of the research and development agenda authorized by Congress under Part F and Part G of amendments to Public Law 94-142. This included supervision of a professional staff in addition to nonprofessional staff. Expertise in research, service delivery to infants, toddlers, children and youth as well as expertise in research and evaluation are required in day to day management of the branch. Knowledge of long range trends and issues in service delivery as well as research and evaluation necessary for program planning and development of priority announcements as well as for oversight of technical work of professional staff.

1985-1988

**U.S. Department of Education
Research Projects and Development Branch
Office of Special Education Programs
Office of Special Education and Rehabilitation Services
Washington D.C.
Research Analyst**

Administered research activities related to special education involving field-initiated research (FIR) grants, grants and contracts responding to Office of Special Education priorities or congressionally mandated research, contracts related to technology integration in special education as well as special projects focusing on effectiveness and evaluation in special education. Served as agency expert in issues pertaining to related services. Set up systems to manage competitions, monitor projects and organize dissemination of research information. Conceptualized, prepared and justified program plans and requests for proposals, as well as departmental and interdepartmental projects pertaining to special education. Responsible for preparation of personnel employed and needed section of annual report to Congress on the state of special education. Maintained active relationships with leaders in the field of special education, research and related services.

1981-Present

Private Practitioner and Consultant in Occupational Therapy

Provided consultative, educative and direct services to local education agencies, state rehabilitation facilitates, private agencies, as well as national, state and international professional associations and universities. Consultation services include analyzing, developing and recommending program policy related to occupational therapy, rehabilitation and/or research; program evaluation and planning; and program development and implementation. These services require a knowledge of and experience with public and private educational and rehabilitation service delivery systems as well as research and training.

1984-1985 **Virginia Polytechnic Institute and State University**
Department of Education
Graduate Education Center
Falls Church, Virginia
Computer and Research Specialist/Graduate Assistant

Provided research and evaluation design, statistical, measurement, computer expertise, and report preparation consultation to faculty and doctoral level students related to a wide range of policy, program effectiveness, and knowledge production studies. The methodological responsibilities included the identification and development, conduct and assurance of the appropriateness of methodological consideration in conducting the proposed studies. This required expertise in experimental, quasi-experimental, ethnographic and other non-quantitative research and evaluation design; descriptive, univariate, and multivariate statistical procedures; classical test theory; knowledge, and expertise in data base development and management; knowledge and facility with computerized statistical programs; ability to interpret statistical findings.

1980-1981 **Hamilton County Office of Education**
Special Center for Learning
Cincinnati, Ohio
Occupational Therapist

Evaluated and provided direct service for children, aged six through twelve years, with behavioral disorders. Administered departmental affairs.

1977-1981 **Private Practitioner in Occupational Therapy**
Cincinnati, Ohio

Evaluated, diagnosed and treated children and adults, with learning and physical disabilities, referred from community schools, professionals and service agencies.

1977-1978 **Reading Intervention Center**
Cincinnati, Ohio
Occupational Therapist

Evaluated and treated students with learning disabilities.

1976-1977 **Doty House**
School for the Orthopedically Handicapped
Middletown, Ohio
Occupational Therapist

Evaluated and treated children aged six through eighteen years, with physical and multiple disabilities.

1976 **Condon School for the Handicapped**
Cincinnati Public Schools
Cincinnati, Ohio
Occupational Therapist

Treated children with physical disabilities and supervised occupational therapist aides.

ACADEMIC APPOINTMENTS:

June 2015 to Present Professor of Occupational Therapy (with tenure) at Rush University Medical Center, Amour Academic Center, 600 S. Paulina St., 1006 AAC, Chicago, IL 60612
Charlotte.L.Royeen@Rush.edu
312.942.7120 Tel.
312.942.2100 Fax.

2003-2015 (May) **Saint Louis University**
Edward and Margaret Doisy College of Health Sciences,
Professor (with tenure) of Occupational Therapy and
Occupational Science

2014 Served as graduate school advisor for Dr. Hubert Benetiz who completed his dissertation in Higher Education Administration.

2012 Served as senior honor project advisor for Holly Kapraun whose interest was in neuroscience, health literacy, exercise and nutrition.

Appointed as graduate faculty member and provide assistance on doctoral dissertations.

Advisor for Postdoctoral Fellow in Neuro-occupation at Saint Louis University

2003 – 2004 Ivelisse Lazzarini

Advisor of Master's Student Projects: Saint Louis University

2007-2008 Elizabeth Tehaar – Joint AOTA Conference Institute Presentation on Neuro- occupation (peer reviewed)

2007-2008 Teresa Cassini Cassini, T., Royeen, C.B., Barney, K., & Royeen, M. (in

- press) “The occupation of city walking: Crossing the invisible line. Second edition of *Occupational Therapy Without Borders: Learning From the Spirit of Survivors* (Kronnenberg, Simo, Algado & Pollard, Eds)
- 2008 - 2009 Jessica Schultz, - “Tactile Defensiveness and Self Esteem in Typically Developing Children”
- 2009- 2010 Kaitlin Chilman – Case Study using the Self-Discovery Tapestry
Niki Kritikos – Case Study of a Therapeutic Toe Ring
Amy Siemer- Analysis of Occupation in the Popular Media
- 2010-2012 Chetna Sethi: worked on various presentations and publications culminating in a joint presentation at the Annual Meeting of the Society for the Study of Occupation. Ms. Sethi has a fully-funded doctoral scholarship at University of North Carolina.
- 2012 Supervised occupational therapy student Samantha Simons on technical assistant for publication and AOTA conference presentations.
- 2014 - 2015 Supervised masters’ student Casey Provaznik for AOTA presentation and corresponding publication on neuroscience literacy.
- 2014 – 2015 Supervised master’s student Alivia Merton and Julie Stambaugh in working with editor of *Occupational Therapy International* for submission of a manuscript on eudemonia and occupational therapy.

**June 1996 to July 2003 Creighton University School of Pharmacy and Allied Health Professions
Omaha, Nebraska
Professor, Occupational Therapy (with tenure Spring, 1998)**

Served as instructor of record in OTD 511 and OTD 522 fall and spring semesters, covering the evolving theory of Neuro-occupation I and Neuro-occupation II with post-professional occupational therapy doctoral students. Papers published by former students as a direct result of supervision in my classes or mentoring:

1. Howell, D. (1999). Neuro-occupation: Linking sensory deprivation and self-care in the ICU patient. Occupational Therapy in Health Care, 11(4), 75-85.
2. Walloch, C. (1998). Mindful meditation: A neuro-occupation analysis. Occupational Therapy International, 5(3), 238-248.
3. Way, M. (1999). Parasympathetic and Sympathetic Influences in Neuro-Occupation Pertaining to Play. Occupational Therapy in Health Care 12(1):71-86.
4. Lohman, H., and Royeen, C. B. (2002). Post Traumatic Stress Disorder and Traumatic Hand Injuries: A Neuro-Occupational View. American Journal of Occupational Therapy, 56 (5), 527-537.

Served as sponsor for clinical doctoral students doing clinical rotations in teaching and scholarship at Creighton University.

Fall 1997	Maureen Duncan
Fall 1998	Curtis Marti
Fall 1999	Jeff Crabtree
Spring 2000	Ahmad Omar Seyed
Fall 2000	Michelle Fisher
Fall 2000	Heather Goertz
Spring 2001	Heather Goertz
Summer 2002	Ivelisse Lazzarini
Summer 2008	Lou E. Jensen

Advisor for Postdoctoral Fellow in Interdisciplinary Training:

2000	Katherine Barrett
2001	Catherine Spence

1992-1996 **Shenandoah University** (not a tenure granting institution)
Winchester, Virginia
Professor, Program in Occupational Therapy

Served as instructor of record for Master of Science courses for occupational therapy students including neuroscience, introduction to research, sensory integration and cognitive rehabilitation. Developed and implemented all courses.

Served as research advisor on four master's projects including:

- “Exploratory Study into School Based Practice of Occupational Therapists”
- “Needs Assessment for Doctoral Level Study in Occupational Therapy”
- “Investigation of Problem Based Learning”
- “Pilot Investigation into Tactile Defensiveness, Self Esteem and Parental Views”

1991-1990 **Virginia Polytechnic Institute and State University**
Educational Research and Evaluation
Graduate Education Center
Falls Church, Virginia
Visiting Professor

Instructor in Foundations of Educational Research.

1989-1987 **Virginia Polytechnic Institute and State University**
Educational Research and Evaluation
Graduate Education Center
Falls Church, Virginia

Adjunct Associate Professor

Instructor in the following graduate level courses; Foundations of Educational Research and Research Applications in Education.

1982-1984 **Howard University**
Washington, D.C.
Assistant Professor in Occupational Therapy

Instructed undergraduate occupational and physical therapy students in the areas of normal and abnormal human growth and development, neuroscience, and research. Departmental administration, University service, scholarly productivity and student advisement were also conducted. Supervised an award winning senior thesis. Assumed responsibility for fieldwork coordination for one year, including site development, legal coordination, and student assignment and student preparation.

1981-1982 **Howard University**
Washington, D.C.
Instructor in Occupational Therapy

Taught occupational and physical therapy students human development, neuroscience, and kinesiology. Participated in departmental administration and University service.

1979-1980 **Washington University**
School of Medicine
St. Louis, Missouri
Graduate Teaching Fellow

Taught occupational and physical therapy students in gross anatomy laboratory.

1980-1981 **Cincinnati Public Schools**
Cincinnati, Ohio
Clinical Instructor in Occupational Therapy

Taught neuroscience and therapeutic application to occupational therapy interns.

SELECTED CONSULTATIONS:

1981-1982 **Maryland State Department of Education**
Bethesda, Maryland
Pilot Program for Autistic Adolescents

Served as a consultant and practitioner in a model, interdisciplinary program designed to provide day treatment, residential care and vocational training to autistic adolescents.

1984 **Mississippi Band of Choctaw Indians**

**Philadelphia, Mississippi
School Study Consultant**

Performed on site interviewing of high school dropouts for a Bureau of Indian Affairs evaluation.

**1984
Woodrow Wilson Rehabilitation Center
Fishersville, Virginia
Education Specialist**

Studied the organizational structure, efficiency and productivity of the occupational and physical therapy departments as directed by successfully responding to the Request for Proposals to evaluate the departments. Analyzed staffing patterns, personnel selection, training and evaluation of staff and supervisors as well as decision making strategies and procedures, staff development, budgeting and communication patterns. Also evaluated patient treatment, patient evaluation and methods and sites of service delivery.

**1986-1990
Project Director for Sensory Integration and Praxis Test
Certification Exam
Contractor: Sensory Integration International
Torrance, California**

Managed the development and implementation of a certification examination for professionals trained to administer the Sensory Integration and Praxis Test. Coordinated test development and refinement executed at a national level.

**1997
Belmont University
Program in Occupational Therapy
Curricular Consultant**

Provided feedback on curricular design and accreditation planning for a developing Master of Science degree program at this University.

**1998
Eastern Washington State University
Curricular Consultant**

Provided feedback on curricular design for a developing baccalaureate program at this University.

**1999
Medical College of Ohio
School of Allied Health, Department of Occupational Therapy
Toledo, Ohio**

Consultant on design of occupational therapy clinical doctoral program.

2000 **University of Indianapolis**
Indianapolis, Indiana

Consultant on occupational therapy clinical doctoral curriculum design.

2001 **University of South Dakota**
Program in Occupational Therapy
Vermillion, South Dakota

Consultant on research.

March 22-24, 2005 **Sickle Cell Disease Program**
Maternal and Child Health
Health Services and Resource Administration
Department of Health and Human Services

Reviewer

March 28-30, 2005 **Quentin N. Burdick Interdisciplinary Rural Health Program**
Bureau of Health Professions
Health Sciences and Resource Administration
Department of Health and Human Services

Reviewer

March 2, 2006 **Department of Occupational Therapy, Kansas University Medical**
Center

Chaired on-site review team for proposed new program offering a clinical doctorate in occupational therapy.

March 7-8, 2006 **Department of Occupational Therapy, Steinhardt School of**
Education, New York University

On site reviewer for proposed new program offering a clinical doctorate in occupational therapy.

August 2009 **DePaul University**

Provided consultation and provided on site meeting facilitation for merger consideration with Rosalind Franklin Medical Center. Final report generated and accepted.

- April 2009** **University of the Sciences in Philadelphia**
- On site reviewer for the Commonwealth of Pennsylvania to review new program offering a clinical doctorate in occupational therapy.
- Fall 2010** **Rosalind Franklin University**
- Course co-instructor with Dr. Gail Jensen for on-line, interprofessional learning doctoral seminar for PhD program.
- Spring 2012** **Trinity College of Dublin, Ireland**
- Nominated and vetted to serve as external evaluator for the Program in Occupational Therapy, Trinity College, Dublin Ireland, March 30 – April 6, 2012. Final report submitted June, 2012. Served as primary reviewer with Dr. Dalia Sachs of Hebrew University of Israel serving as secondary reviewer.
- Fall 2012**
Fall 2013
Fall 2014
Fall 2015
Fall 2016 **American Physical Therapy Association**
- Developed and revised module and repeated services as expert advisor for APTA Learning Center, Educational Leadership Institute, Module 2: Higher Education, Health Care Systems, and Society. Online publication with on site development for leaders of tomorrow, which now serves as a postdoctoral residency for qualified PT applicants.
- Fall 2012** **Department of Education, Commonwealth of Massachusetts**
- Served as team leader for review of developing doctoral program in occupational therapy.
- Spring 2013** **Arkansas State University**
- Conceptualized, developed, and delineated an entry level occupational therapy doctoral program for this institution based upon regional need and university context. This innovative model program has been approved by the university and the state of Arkansas and is now being implemented as one of the first state schools to develop a new program at the doctoral level of entry.
- January 2015** **University of Sciences in Philadelphia**
- Serving as ACOTE accreditation consultant for the doctoral program in occupational therapy.

January 2015 **University of Southern Florida**
Serving as consultant to the Director of Rehabilitation programs for development of an entry level program in occupational therapy.

PROFESSIONAL SERVICE:

National Organizations:

1987-present	Society for Neuroscience; Member.
1988	American Occupational Therapy Association; Fellow.
1991	Laurie Center for Infants and Children; Advisory Committee.
1991-2001	Office of Special Education and Rehabilitation Services, U.S. Department of Education; Grant Reviewer.
1995-2001	American Occupational Therapy Foundation; Grants Research Advisory Committee.
1995-2002	Sensory Integration International; Grants Reviewer and Advisory Panel Member.
1996	Board of Scientific Counselors, Division of Rehabilitation Medicine, National Institutes of Health; Ad Hoc Reviewer.
1997	U.S. Department of Health and Human Services, Maternal and Child Health; Funded Grant Reviewer.
1997-2000	National Board for Certification in Occupational Therapy; Item Writer and Test Rubric Consultant.
1998-1999	Occupational Therapy Professional Program Director's Council, American Occupational Therapy Association; Chair Elect.
1998-1999	National Board for Certification in Occupational Therapy; Rubric Task Force Member.
1998-2001	Commission on Education, American Occupational Therapy Association; Member and Secretary.
1998-2001	American Occupational Therapy Association, Education Special Interest Section; Chairperson.
1998	U.S. Department of Education, Field Initiated Research of Special Education; Reviewer.
1998	McMaster University, Tufts University & University of Southern California; External Reviewer for Tenure and Promotion.
1998	American Occupational Therapy Association, <i>American Journal of Occupational Therapy</i> ; Ad hoc Reviewer.
1999	Philadelphia College of Pharmacy and Sciences; External Funded Grant Reviewer.
1999	American Occupational Therapy Foundation Consensus Conference, Invited Participant.
1999	American Occupational Therapy Foundation; Funded Grant Reviewer.
2000	American Occupational Therapy Association, Commission on Education, Chairperson-Elect.

- 2001-2004 Chairperson, American Occupational Therapy Association, Commission on Education.
- 2001-2004 Director, Board of Directors, American Occupational Therapy Association.
- 2002-2003 Co-Organizer of the Annual Midwest Deans' Occupational Therapy Research Conference.
- 2004 New York University, Creighton University, University of Miami, University of New Zealand; External Reviewer for Promotion & Tenure.
- 2004 HRSA Federal Grant Review.
- 2004 Specialty reviewer for *American Journal of Occupational Therapy*, 2004.
- 2004 Gesellschaft fur Sensorische Integration-Jean, Ayres, Deutschland und International e.V. (GSID). Review test development funded by Regierung Von Oberbayern.
- 2001, 2004 University of Eastern Kentucky, Program in Occupational Therapy, Lexington, Kentucky. Advisor and consultant to the first endowed Chair position in Occupational Therapy, Dr. Doris Pierce.
- 2005- to present Specialty reviewer for the *American Journal of Occupational Therapy*.
- 2005- to present Reviewer for *Occupational Therapy International*.
- 2005 HRSA Federal Grant Review Panel
- 2005 MCH Federal Grant Review Panel
- 2005 Training for on site accreditation review. Council for Accreditation in Physical Therapy (CAPTE).
- 2006 On site reviewer Council for Accreditation in Physical Therapy (CAPTE) (June).
- 2006 Moderator for "Integrity in Teaching and Research Forum," Office of Research, Saint Louis University, January 12.
- 2006 External evaluator for tenure and promotion review: East Carolina State University, Creighton University.
- 2007 On site reviewer for Council for Accreditation in Physical Therapy (CAPTE) (April).
- 2007 Specialty reviewer for *Occupational Therapy Journal* (May).
- 2007 Editorial Board Member, *Journal of Interprofessional Care*.
- 2007 Creighton University, External Review for Tenure and Promotion.
- 2008 George Washington University; External Reviewer for Promotion and Tenure.
- 2008 On site reviewer for Council for Accreditation in Physical Therapy (CAPTE) (April).
- 2008/2009 Consultant with Saint Louis Zoo regarding sensory processing and chimpanzee behavior
- 2009 Emory University; External Reviewer for Promotion & Tenure
- 2009 On site reviewer for Council for Accreditation in Physical Therapy (CAPTE) (February).
- 2009 Editorial Review Board: *American Journal of Occupational Therapy*, *Journal of Occupational Science*; *Occupational Therapy International*, *Journal of Allied Health*.
- 2009 Annual Doctoral Network, American Occupational Therapy Association
- 2009 Member, Board of Directors, St. Mary's Hospital

- 2010 Editorial Board Review *American Journal of Occupational Therapy, Journal of Occupational Science; Occupational Therapy International, Journal of Allied Health.*
- 2010 Annual Doctoral Network, American Occupational Therapy Association
- 2010 Member, Board of Directors, St. Mary's Hospital.
- 2010 On site reviewer for Council for Accreditation in Physical Therapy (CAPTE) (March).
- 2011 Editorial Board Review *American Journal of Occupational Therapy, Journal of Occupational Science; Occupational Therapy International, Journal of Allied Health.*
- 2010 SSM St. Mary's Health Center Community Advisory Board, Richmond, MO.
- 2011-2015 Council of Accreditation, Commission on Accreditation for Physical Therapy Education (Administrative Representative); Member
- 2010-2012 Society for the Study of Occupation: USA; Treasurer.
- 2011-2012 SSM St. Mary's Health Center Community Advisory Board, Richmond, MO.
- 2011-2015 Public member, Council for Dental Accreditation
Member of ad hoc task force developing standards for dental therapist accreditation.
- 2011 External evaluation for Rank and Tenure, University of Texas at Galveston.
- 2012 SSM St. Mary's Health Center Community Advisory Board, Richmond, MO.
- 2012 Editorial review board member *Occupational Therapy International*, ad hoc reviewer for *Journal of Occupational Science.*
- 2012-2015 Appointed member of Dental Therapy Educational Standards Group, American Dental Association.
- 2012-2013 Member, Ad hoc task force of national leaders on the Future of Occupational Therapy Education (FOTE)
- 2011-2013 Appointed ad hoc member of Innovation in physical therapy education group, Commission for Accreditation of Physical Therapist Education.
- 2013 Editorial Review *American Journal of Occupational Therapy, Journal of Occupational Science; Journal of Allied Health.*
- 2013 Editorial Board Member: *Occupational Therapy International*
- 2012-2014 Society for the Study of Occupation: USA; Treasurer. (Second Term)
- 2014 Member of American Occupational Therapy Association Task Force on the Future of Education
- 2014 External rank and tenure reviewer for Creighton University and University of Texas at El Paso.
- 2014-2015 Editorial Reviewer *Journal of Occupational Science.*
- 2015 External rank and tenure reviewer for Creighton University.
- 2016 Editorial Reviewer for *Journal of Allied Health*
- 2016 External rank and tenure reviewer for Trinity College, Dublin, Ireland.
- 2016 Completed editorial service to *Occupational Therapy International.*
- 2016 Editorial Board Member, *Open Journal of Occupational Therapy.*

2016 Editorial Reviewer Board Member, Open Journal of Occupational Therapy

Memberships:

1976-present American Occupational Therapy Association
 1979-present Society for Neuroscience
 1984-present American Education Research Association
 1996-2003 Nebraska Minority Health Association; Member
 1996-2003 Nebraska Occupational Therapy Association; Member

Rush University Medical Center Committees

2015-2016 Executive Leadership Council
 2015-2016 University Executive Council
 2015-2016 University Council
 2015-2016 Rush University Interprofessional Initiative
 2015-2016 College of Health Sciences Chair's Council

Saint Louis University Committees:

2003-2004 University Undergraduate Affairs Committee

2004–2005 University Technology Committees
 University Academic Accommodations Committee
 Council of Academic Deans and Directors

2005-2006 University Strategic Plans for Information Technology
 University Technology Committee
 University Academic Accommodations Committee
 Council of Academic Deans and Directors
 Dean's Coordinating Committee, Doisy College
 Chairs Discussion Group, Doisy College
 Chair, Search Committee, Dean of Engineering

2006-2007 Director, Interprofessional Strategic Initiatives Committee
 University Strategic Plan for Information Technology
 University Undergraduate Academic Affairs Committee
 University Technology Committee
 University Academic Accommodations Committee
 Council of Academic Deans and Directors
 Dean's Coordinating Committee, Doisy College
 Chairs Discussion Group, Doisy College
 Doisy Accommodations Committee
 Ad Hoc University Committee on Online Course Evaluation

2008-2009	Council of Academic Deans and Directors Dean's Coordinating Committee, Doisy College Council of Dean's Advisory on Interprofessional Education
2009-2010	Council of Academic Deans and Directors Dean's Coordinating Committee, Doisy College Council of Dean's Advisory on Interprofessional Education
2010-2011	Council of Academic Deans and Directors Dean's Coordinating Committee, Doisy College Interdisciplinary Study of Pain NCAA Accreditation Review Report
2011-2012	Voted as Dean's Representative to the University Undergraduate Academic Affairs Committee
2010-2014	Tree Committee, SLU
2014-2015	Member, entry level OTD curriculum planning committee

Creighton University Committees:

1996-2003	Creighton University, School of Pharmacy and Allied Health Professions; Executive Committee
1996-2003	Creighton University, School of Pharmacy and Allied Health Professions; Administrative Committee
1996-2003	Creighton University, School of Pharmacy and Allied Health Professions; Strategic Planning/Implementation Committee
1996-2003	Creighton University, School of Pharmacy and Allied Health Professions; Program Assessment Committee
1996-2003	Creighton University, School of Pharmacy and Allied Health Professions; Faculty Development Committee
1996-2003	Creighton University, School of Pharmacy and Allied Health Professions; OT Admissions Committee
1996-2003	Creighton University School of Pharmacy and Allied Health Professions; OT Curriculum Committee
1996-2003	Creighton University; Health Sciences Research Committee
1998-1999	Creighton University, Center for Practice Improvement and Outcomes Research; Research Advisory Committee
1999-2000	Creighton University, Creighton Medical Associates; Clinical Strategic Planning Committee
2000, 2001	Creighton University, Research Compliance Committee
2000-2003	Creighton University, Research Advisory Committee.
2000-2003	Creighton University Carnegie Academy for Teaching and Learning.
2001-2003	Academic Affiliation Council, Creighton University and Alegent Health

2001-2003	Biomedical Research Grant for Health Sciences, Creighton University
2001	Steering Committee Member, Carnegie Academy for Teaching and Learning, Creighton University.
2001	Strategic Planning Committee for Technology, Creighton University.
2002	Responsible Conduct in Research Committee, Creighton University
2002	Cancer & Smoking Disease Research Program Internal Advisory Committee, Creighton University

HONORS AND AWARDS:

- 1983** **Doctoral Fellowship.** Awarded jointly by the American Occupational Therapy Association and the American Occupational Therapy Foundation in recognition of a doctoral student displaying superior skills in clinical practice, consultation, supervision, education, and research.
- 1985** **Instructional Fee Scholarship.** Awarded by Virginia Polytechnic Institute and State University for academic excellence in doctoral level study.
- 1986** **Quality Step Increase.** Awarded for outstanding service in the federal government.
- 1988** **Fellow, American Occupational Therapy Association.** Honored to receive this award based upon work in research and scholarly activity in pediatric occupational therapy and research methodology.
- 1989** **Faculty Emeritus, Sensory Integration International.** Granted to faculty members of this organization in recognition of development of theory and practice in sensory integration.
- 1990** **Outstanding Innovation in Continuing Education.** Awarded to the Self Study Series, for which I served as Editor, by the American Society of Association Executives.
- 1992** **Certificate of Appreciation for Leadership in NDT Research.**
Awarded by the Neurodevelopmental Treatment Association, May.
- 1997** **Bill Burian Memorial Keynote Lecture.** Invited keynote speaker at the 10th Annual Midwest Dean's Occupational Therapy Research Day, Western Michigan University, Kalamazoo, MI, March 15.

- 1998** **Jean Ayres Research Award.** A scholarly award presented by the American Occupational Therapy Foundation for exemplary and sustained contributions in the development and application of theory (April 4th, Baltimore, MD, AOTA Annual Conference.)
- 2001** **Service Award** from the American Occupational Therapy Association for chair, Education Special interest Section, 1998-2001.
- 2002** **Eleanor Clarke Slagle Lectureship Award.** Presented by the American Occupational Therapy Association. Award presented in 2002. Lectureship presented in 2003. This is the highest academic or scholarly award bestowed by the American Occupational Therapy Association.
- 2002** **Nebraska Occupational Therapy Association Contributor of the Year Award.** In honor of outstanding contributions in occupational therapy education, research and practice. April 29, 2003.
- 2004** **Service Award** from the American Occupational Therapy Association for Chair of the Commission on Education, 2001-2004
- 2006** **Alpha Sigma Nu Jesuit Book Award.** “Educating for Moral Action: A Sourcebook for Health and Rehabilitation Ethics,” by R. Purtilo, G.M. Jensen, & C.B. Royeen (Editors) was selected as a winner in the category for the sciences. There were 44 editors from 15 Jesuit institutions.
- 2007** Granted honorary membership in the **National Jesuit Honor Society** (Alpha Sigma Nu) for outstanding scholarship, loyalty and service by Alpha Sigma Nu Student Leadership.
- 2007** **J. Warren Perry Distinguished Author Award,** for “Guiding Principles in a Merger of Allied Health and Nursing,” from the American Association of Schools of Allied Health, *Journal of Allied Health*, William Siler and Charlotte Royeen, authors.
- 2012** **Founders Award** for outstanding contribution to rehabilitation ethics from the Dreamcatchers Visionary Ethics Consortium, June 9, 2012.
- 2012** **Service Award** from the Society for the Study of Occupation: USA for (2) terms as Treasurer (2010-2012) (2012-2014)
- 2015** **Certificate of Appreciation,** from the American Dental Association, in recognition as a member of the Dental Committee on Predoctoral level education (August) (2012-2015)

- 2015** **Certificate of Appreciation**, from the American Dental Association, in recognition as a member of the Commission Dental Education (August) (2012-2015)
- 2015** **Certificate of Appreciation**, from the American Physical Therapy Association. In recognition as a member of the Commission on Physical Therapy Education (2011-2015)
- 2016** **Leaders & Legacy Society** of the American Occupational Therapy Association. Awarded in recognition of sustained leadership in occupational therapy.
- 2016** **Inaugural Chair, A. Watson Armour III Presidential Professor**, Rush University, whereas it is customary among institutions of higher learning to create chairs recognizing special excellence in the pursuit of knowledge, and whereas Charlotte Royeen, PhD, has demonstrated exemplary accomplishment as an academic leader in the biomedical sciences, and whereas generous philanthropy made possible the establishment of a presidential chair in 2011, Charlotte Royeen, PhD, be known as the A. Watson Armour III Presidential Professor at Rush University.

GRANTS:

1. Royeen, C.B. (PI). Instrument development for assessing tactile defensiveness in children.” American Occupational Therapy Foundation, (\$4,700, Spring, 1977).
2. DeGangi, G., Royeen, C.B. “Three year programmatic research investigation into implementation of the federally mandated IFSP process.” Field Initiated Research Competition, National Institute of Disability Rehabilitation Research, U.S. Department of Education. (\$481,000, May, 1991-April, 1993).
3. Royeen, C. B. (PI). “Innovation in Occupational Therapy Education: Phase I.” Education Research Project, U.S. Dept. of Education. (\$4,800, December, 1992).
4. Royeen, C. B. (PI). “Problem based learning for occupational therapy curriculum Phase II.” Education Research Project, U.S. Dept. of Education. (\$5,000, March, 1993).
5. Royeen, C.B. (PI). “An Innovative Approach to Education of the Rural School Based Occupational Therapist” Division of Personnel Preparation, U.S. Department of Education (\$281,000, February, 1994-January, 1997).
6. Hammel, J., Royeen, C.B. “AOTF/AOTF Research Symposium into Technology.” American Occupational Therapy Association. (\$10,000, Fall, 1994).
7. Royeen, C.B. “Medicaid billing patterns for occupational therapy and physical therapy in the public schools.” Seed money from Center for the Study of Children’s Issues of

- Creighton University (\$900, January, 1997).
8. Royeen, C.B, Jensen, G. "Building Community: Collaboration among Occupational Therapists and Physical Therapists with Native Americans" Bureau of Health and Human Services, 9/30-98-6/30/2000, \$417,155.
 9. Zardetto-Smith, A., and Royeen, C.B. (Primary Administrator and Director of Evaluation). "Kids Judge! Neuroscience", a project to increase literacy in neuroscience among clinicians, educators, and the general public. National Institute of Drug Abuse, NIH, (Science Education Drug Abuse Partnership Program) (\$50,000, September, 1998-June, 2000).
 10. Jensen, G., Royeen, C.B. "Continuous Connection: Consortium for Rural, Interdisciplinary Training", Bureau of Health and Human Services. 7/1/99-6/30/02, \$444,370.
 11. Zardetto-Smith, A., Royeen, C.B. (Primary Administrator and Director of Evaluation). "Brain Rule! Neuroscience Exposition." A five year project to increase science literacy and prevent drug abuse. National Institute of Drug Abuse, NIH (Science Education Drug Abuse Partnership Program). (Funding October, 2000-September, 2004, 1.2 million).
 12. Monaghan, M., Royeen, C.B. (Project Evaluator). "Using Performance-based Assessments to Evaluate Curricular Effectiveness in Pharmacy Education." Fund for the Improvement of Postsecondary Education (FIPSI), October 1, 2000 through September 30, 2003, \$156,630.
 13. Royeen, C.B., Jensen, G. "Allied Health Leadership in Generational Health and Ethics." Department of Health and Human Services, Health Resources & Services Administration. 7/1/01-6/30-04, \$486,000.
 14. Royeen, C.B. President's Opportunity Fund for development of interprofessional education, Saint Louis University, 2006, \$287,000. In 2007, this initiative became part of Doisy College's base budget and eventually become part of the Office of the Provost base budget for interprofessional education.

PUBLICATIONS:

Books:

1. Royeen, C.B. (1988). Research tradition in occupational therapy: Process, philosophy and status. Thorofare, N.J.: Slack Publishing Co. (with a chapter by Gail Hills Maquire)
2. Royeen, C.B. (1988). Guest editor for a special issue of the American Journal of Occupational Therapy entitled, "Special Issue on Occupational Therapy in the Schools", Volume 42, Issue 11.

3. Royeen, C.B. (Ed.). (1989). Assessing function. Bethesda, MD: American Occupational Therapy Association, Inc.
4. Royeen, C.B. (Ed.). (1989). Clinical research handbook: An analysis for the service professions. Thorofare, N.J.: Slack Publishing Co.
5. Royeen, C.B. (Ed.) (1990). Neuroscience foundations of human performance. Bethesda, MD: American Occupational Therapy Association.
6. Royeen, C.B. (Ed.). (1991). School based practice for related services. Bethesda, MD: American Occupational Therapy Association.
7. Royeen, C.B. (Ed.). (1992). Classroom applications for school based practice. Bethesda, MD: American Occupational Therapy Association.
8. Royeen, C.B. (Ed.). (1993). Cognitive rehabilitation. Bethesda, MD: American Occupational Therapy Association.
9. Royeen, C.B. (Ed.). (1994). Putting occupation back into therapy. Bethesda, MD: American Occupational Therapy Association.
10. Royeen, C.B. (Ed.). (1995). Hands on: A guide to rehabilitation of the hand. Bethesda, MD: American Occupational Therapy Association.
11. Royeen, C.B. (Ed.). (1996). Stroke. Bethesda, MD: American Occupational Therapy Association.
12. Crist, P., and Royeen, C.B. (Eds.). (1997). Infusing occupation into practice: A comparison of three clinical approaches in occupational therapy. Bethesda, MD: American Occupational Therapy Associations.
13. Royeen, C.B. (1997). A research primer. Bethesda, MD: American Occupational Therapy Association.
14. Royeen, C.B. (Ed.). (1997). Neuroscience and occupation: Links to practice. Bethesda, MD: American Occupational Therapy Association.
15. Royeen, C.B. (Ed.). (1998) Guest editor for a special issue of Occupational Therapy International, "Sensory Integration," Volume 5, Issue 4.
16. Crist, P.A., Royeen, C.B., and Skade, J.K. (2000) Infusing occupation into practice: Second edition. Bethesda, MD: American Occupational Therapy Association.
17. Kramer P., Hinojosa J. & Royeen, C.B. (Eds.) (2003). Perspectives in human occupation: Participation in life. Philadelphia, PA: Lippincott/Williams & Wilkins

18. Royeen, C.B. (Ed.) (2003). Pediatric issues in occupational therapy: A compendium of leading scholarship. Bethesda: AOTA.
19. Purtle, R.B., Jensen, G.M., and Royeen, C.B. (Eds.) (2005). Educating for moral action: A sourcebook in health and rehabilitation ethics. Philadelphia: F.A. Davis. Alpha Sigma Nu Book Award, 2006.
20. Royeen, C.B., Jensen, G.M., and Harvan, R. (Eds.) (2009) Leadership in Interprofessional Health Education and Practice. Sudbury, MA: Jones Bartlett Publishers.
21. Royeen, C.B., & Luebben, A.L. (Eds) (2009). A compendium of leading scholarship in sensory integration. Bethesda: American Occupational Therapy Association.
22. Hinojosa, J., Kramer, P. & Royeen, C.B. (Eds.) Second Edition: Perspectives in human occupation. Philadelphia, PA: FA Davis. (Submitted into production).
23. Swisher, L.L. & Royeen, C.B. (Eds.) Rehabilitation Ethics. Sudbury, MA: Jones Barlett Publishers. (In development).

Book Chapters:

1. Neville, P., Royeen, C.B., & Keilhofner, G. (1985). Childhood, in G. Keilhofner (Ed.), A model of human occupation: Theory and application. Baltimore: Williams and Wilkins.
2. Royeen, C.B. (1989). Program evaluation in pediatric occupational therapy. In P.N. Clark (Ed.), Occupational therapy for children, (2nd Ed.). New York: C.V. Mosby.
3. Royeen, C.B., Lane, S. (1991). Tactile functions. In: Sensory integration theory and practice. A. Fisher and B. Murrey (Eds.) Philadelphia: FA Davis Co.
4. Royeen, C.B., Coutinho, M. (1991). What special education administrators need to know about occupational therapy. In: Pediatric Occupational Therapy: Facilitating Effective Service Provision. W. Dunn (Ed.). Thorofare NJ: SLACK, Inc., pp.307-317.
5. Royeen, C.B. (1997). Play as an indicator of health and wellness. In: The Essence of Play, B.E. Chandler (Ed.). Bethesda, MD: American Occupational Therapy Association.
6. Royeen, C.B. and Richards, J. (1998). Nonstandardized assessment tools. In: Assessment in Occupational Therapy, J. Hinojosa and P. Kramer (Eds.). Bethesda, MD: American Occupational Therapy Association.
7. Royeen, C.B. and Duncan, M. (1999). Acquisitional Frame of Reference. In: Frames of Reference for Pediatric Occupational Therapy, P. Kramer and J. Hinojosa (Eds). Philadelphia: Lippincott Williams and Wilkins. (2nd Ed.) pp. 377-400.

8. Royeen, C.B., Duncan, M., and McCormack, G. (2001). Reconstruction of the Rood Approach for Occupation Based Treatment, Chapter 33. In: Occupational Therapy: Practice Skills for Physical Dysfunction, Pedretti, S. (Ed.), 5th Edition, St. Louis: C. V. Mosby, p. 576-587.
9. Mu, K., Royeen, C., Paschal, K. A., and Zardetto-Smith, A. M. (2001). Promoting Awareness of Occupational Therapy in Physical Therapy in Young School Aged Children: An Interdisciplinary Approach. In: Interprofessional Collaboration in Occupational Therapy, Paul, S. and Peterson, C. Q. (Ed's). New York: Haworth Press, p. 89-100.
10. Royeen, C.B. (2005) Appendix F: Ongoing wisdom after the lecture: "Her-story": A polemic for action or a pink-collar call for feminist development in occupational therapy. In Rene Padilla (Ed). A professional legacy: The Eleanor Clarke Slagle Lecturers in Occupational Therapy, 1955-2004, 2nd Edition. Bethesda: AOTA.
11. Luebben, A., Royeen, C.B. (2005). Nonstandardized testing. Chapter revision for 2nd Edition of Assessment in Occupational Therapy, J. Hinojosa and Paula Kramer, Eds. Bethesda: AOTA.
12. Royeen, C.B. (2005). The ephemeral ethics of evidence-based practice. In RB Purtilo, GM Jensen, and CB Royeen (Eds.), Ethics for moral action: A sourcebook for health and rehabilitation ethics. Philadelphia: F.A Davis.
13. Jensen, G.M., Harvan, R., and Royeen, C.B. (2009). Interprofessional education: Context, complexity and challenge. Chapter 1 in C.B. Royeen, G.M. Jensen and R. Harvan (Eds.) Leadership in Interprofessional Health Education and Practice. Sudbury, MA: Jones Bartlett Publishers.
14. Royeen, C.B., Terharre, E., and Walsh, S. (2009). Interprofessional education: History, review, and recommendations for professional accreditation agencies. Chapter 3 in C.B. Royeen, G.M. Jensen and R. Harvan (Eds.) Leadership in Interprofessional Health Education and Practice. Sudbury, MA: Jones Bartlett Publishers.
15. Harvan, R., Royeen, C.B., and Jensen, G.M. (2009). Grounding interprofessional education in theory. Chapter 4 in C.B. Royeen, G.M. Jensen and R. Harvan (Eds.) Leadership in Interprofessional Health Education and Practice. Sudbury, MA: Jones Bartlett Publishers.
16. Royeen, C.B., Jensen, G.M., and Harvan, R. (2009). Where do we go from here? Chapter 27 in C.B. Royeen, G.M. Jensen and R. Harvan (Eds.) Leadership in Interprofessional Health Education and Practice. Sudbury, MA: Jones Bartlett Publishers.

17. Royeen, C.B. (2010). Dynamical Systems Theory and Occupational Therapy Management. Chapter 5 in McCormack's (Ed.) Occupational Therapy Manager. Bethesda: American Occupational Therapy Association.
18. Jensen, G.M., & Royeen, C.B. (2010). Education of professionals: Health related. In International Encyclopedia of Education (2nd Ed.) New York: Elsevier
19. Goulet, C., Doll J., Cochran T., Jensen, G.M. and Royeen, C.B. (2010). Interprofessional scholarship, service and action: A sustainable model for scholarship of engagement. In Participatory Partnerships for Social Action and Research. Chapter in Harter, Hamel-Lambert, and Millesen (Eds.); Dubuque, IA: Kendall Publishing Company, Dubuque, Iowa.
20. Luebben, A.L., & Royeen, C.B. (2010). Chapter 8, "Nonstandardized testing" (pages 157-158) in J. Hinojosa, P. Kramer and P. Crist (Eds.), Evaluation: Analyzing and interpreting data. Bethesda, MD: AOTA
21. Cassini, T., Royeen, C.B., Barney, K., & Royeen, M. (2011). Chapter 42, "The occupation of city walking: Crossing the invisible line. Occupational Therapy Without Borders: Volume 2. Towards an Ecology of Occupation-Based Practices. St. Louis, MO.
22. Royeen, C.B., and Kramer, P. (2013). Professional Preparation for Practice. Chapter in Joy Higgs, Will Letts (Canada/OZ), Dale Sheehan (NZ), Julie Baldry-Currens (UK), and Gail Jensen (USA). Realising Exemplary Practice-Based Education. Sense Publishers, Rotterdam, The Netherlands.
23. Luebben, A.L., & Royeen, C.B. (2014). Chapter revision, "Nonstandardized testing" (pages 157-158) in J. Hinojosa, P. Kramer and P. Crist (Eds.), Evaluation: Analyzing and interpreting data. Bethesda, MD: AOTA

Journal Articles:

1. Royeen, C.B. (1980). Test-retest reliability of the Southern California Postrotary Nystagmus Test. American Journal of Occupational Therapy, 34(1), 37-39.
2. Royeen, C.B., Lesinski, G., Ciani, S., & Schneider, D. (1981). The Southern California Sensory Integration Tests, The Southern California Postrotary Nystagmus Test and clinical observations accompanying them to evaluations in otolaryngology, ophthalmology and audiology. American Journal of Occupational Therapy, 35(7), 443-450.
3. Royeen, C.B. (1982). Roughness perception in children. Perceptual and Motor Skills, 54, 323-330.

4. Royeen, C.B. (1982). Comments upon "The Southern California Postrotary Nystagmus Test: Test-retest reliability for preschool children." (Letter to the editor). Occupational Therapy Journal of Research, 2(2), 125-126.
5. Royeen, C.B., & Kannegieter, R.A. (1984). Fingertip textural perception in normal children. Occupational Therapy Journal of Research, 4(4), 261-270.
6. Royeen, C.B. (1984). Incidence of atypical responses to vestibular stimulation among behavioral disordered children. Occupational Therapy Journal of Research, 4(3), 59-60.
7. Royeen, C.B. (1984). Initial profile of therapists seeking certification in sensory integrative testing. American Journal of Occupational Therapy, 38, 44-45.
8. Royeen, C.B. (1985). Domain specification of the construct tactile defensiveness. American Journal of Occupational Therapy, 39(5), 596-599.
9. Royeen, C.B., & Fortune, J.F. (1985). Data modification commands for summated scale reliability analysis using SPSS. Journal of Occupational Therapy Research, 5(4), 257-258.
10. Royeen, C.B. (1985). Adaptation of Likert scaling for use with children. Occupational Therapy Journal of Research, 5(1), 59-69.
11. Royeen, C.B., & Little, L. (1985). Autistic adolescents: Developmental milestones and a model program. Article appears jointly in Occupational Therapy and Adolescents with Disability (The Hawthorn Press, 1985) and Occupational Therapy in Health Care, 2(3), 59-69.
12. Royeen, C.B. (1986). Evaluation of school based occupational therapy programs: Need, strategy and dissemination. American Journal of Occupational Therapy, 40(12), 811-813.
13. Royeen, C.B. (1986). Commentary on "Preliminary report of a methodology for determining tactile localization in adults." Occupational Therapy Journal of Research, 6(4), 207-210.
14. Royeen, C.B. (1986). The boxplot: A test for screening research data. American Journal of Occupational Therapy, 40(8), 569-571.
15. Royeen, C.B. (1986). Development of a touch scale for elementary school aged children. American Journal of Occupational Therapy, 40(6), 414-419.
16. Royeen, C.B. (1986). Entry level education in occupational therapy. American Journal of Occupational Therapy, 40(6), 425-427.
17. Royeen, C.B., & Seaver, W.F. (1986). Promise in nonparametrics. American Journal of Occupational Therapy, 40(3), 191-193.

18. Royeen, C.B. (1987). Test-retest reliability of touch inventory for elementary school aged children. Physical and Occupational Therapy in Pediatrics, 7(3), 45-52.
19. Royeen, C.B. (1987). TIP: Touch inventory for preschoolers. Physical and Occupational Therapy in Pediatrics, 7(1), 29-40.
20. Royeen, C.B. (1988). Review of the Degangi-Berk test of sensory integration. Physical and Occupational Therapy for Pediatrics, 8(2/3), 71-75.
21. Royeen, C.B., & Marsh, D.M. (1988). Promoting occupational therapy in the schools. American Journal of Occupational Therapy, 42(11), 713-717.
22. Royeen, C.B. (1988). Nationally speaking - occupational therapy in the schools. American Journal of Occupational Therapy, 42(11), 697-700.
23. Royeen, C.B. (1989). Commentary on "Tactile functions in learning disabled and normal children: Reliability and validity considerations." Occupational Therapy Journal of Research, (9)1:16-23.
24. Royeen, C.B., Fortune, J.C. (1990). TIE: Tactile inventory for school aged children. American Journal of Occupational Therapy, 44(2), 155-160.
25. Royeen, C.B. (1990). Occupational therapy in a nontraditional setting. American Journal of Occupational Therapy, 44(2), 172-74.
26. Royeen, C.B., Koomar, J., Cromack, R. & Fortune, J. (1991). Development of the sensory integration and praxis tests competency exam: Exploration of validity and reliability. Occupational Therapy Journal of Research, 6(11), 1-6.
27. Hanft, B. & Royeen, C.B. (1991). Commentary: Efficacy of therapeutic intervention intensity with infants and young children with cerebral palsy. Infants and Young Children, 4(2), 8-10.
28. Royeen, C.B. & Gorga, D. (1991). Occupational therapy in pediatric rehabilitation. Pediatrician, 17:278-282.
29. DeGangi, G., Royeen, C.B., & Wietlisbach, S. (1992). How to examine the individualized family service plan process: Preliminary findings and a procedural guide. Infants and Young Children, 5(2), 42-56.
30. Royeen, C.B., DeGangi, G., & Poisson, S. (1992). Development of the individualized family service plan Anchor Guide. Infants and Young Children, 5(2), 57-64.
31. Royeen, C.B. (1992). A glimpse of the human experience: Parenting infants and toddlers who are disabled. Infants and Young Children, 5(2), 65-67.

32. DeGangi, G.A., Wietlisbach, S. & Royeen, C.B. (1994). A look at cross cultural issues in early intervention. Topics in Early Childhood Special Education, 14(4), 503-520.
33. DeGangi, G.A. & Royeen, C.B. (1994). Current practice among neurodevelopmental treatment association members. American Journal of Occupational Therapy, 48(9), 803-809.
34. Royeen, C.B. (1995). A new focus in occupational therapy education. American Journal of Occupational Therapy, 49(4), 338-346.
35. Royeen, C.B. (1996). Third party prescription for school based occupational therapy. American Journal of Occupational Therapy, 50(9), 750-751.
36. Royeen, C.B., Cromack, T., DeGangi, G., Poisson, S. & Wietlesboch, S. (1996). Parent and Professional Attitudes about the Individualized Family Service Plan: A Preliminary Report. Occupational Therapy Journal of Research, 16(2), 111-139.
37. Royeen, C.B. & Furbush, R. (1996). A pilot study of needs assessment for school based practice. American Journal of Occupational Therapy, 50(9), 747-749.
38. Royeen, C.B. & Salavatori, P. (1997). Comparison of problem-based learning curricula in two occupational therapy programs. Canadian Journal of Occupational Therapy, Oct., 197-202.
39. Stephens, C. & Royeen, C.B. (1998). Investigation and tactile defensiveness and self esteem in typically developing in children. Occupational Therapy International, 5(4), 273-280.
40. Hotz, S.D. & Royeen, C.B. (1998). Perception of behaviors associated with tactile defensiveness: An exploration of the differences between mothers and their children. Occupational Therapy International, 5(4), 281-291.
41. Hammel J, Royeen C, Bagatell N, Chandler S, Jensen G, Loveland J & Stone G. (1999). Student Perspectives on Problem Based Learning in an Occupational Therapy Curriculum: A Qualitative Study. American Journal of Occupational Therapy, 53:199-206.
42. Threlkeld, A.J., Jensen, G. & Royeen, C.B. (1999). The clinical doctorate: A framework for analysis in physical therapist education. Physical Therapy, 79(6):567-581.
43. Royeen, C.B., & Stohs, S. (1999). Should the clinical doctoral degree be the standard of entry into the practice of occupational therapy? Innovations in Occupational Therapy Education, 1(1):171-177.
44. Royeen, C.B., Zardetto-Smith, A.M., Duncan, M.E.M. (1999). Preliminary study of learning through discussion in occupational therapy education. Innovations in Occupational Therapy Education, 1(1):13-26.

45. Cochran, T., Jensen, G. M., Duncan, M. & Royeen, C. (1999). Cultural incompetence: when your best efforts are challenged. Physical Therapy, 79, S78.
46. Royeen, C.B., Mu, K., Barrett, K. & Luebben, A. (2000). Pilot Investigation: Evaluation of clinical reflective reasoning before and after workshop intervention. Innovations in Occupational Therapy Education. (p. 107-115)
47. Zardetto-Smith, A., Mu, K., Ahmad, S.O. & Royeen, C.B. (2000). A model program for bringing neuroscience to children: An informal neuroscience education program. The Neuroscientist, 6(3), 159-168.
48. Royeen, C.B., Duncan, M., Crabtree, J., Richards, J., Frolek & Clark, G. (2000). Effects of billing Medicaid for occupational therapy services in the schools: A pilot study. American Journal of Occupational Therapy, 54(4), 429-433.
49. Jensen, G.M. & Royeen, C.B. (2001). Analysis of Academic-Community Partnerships using the integration matrix. Journal of Allied Health Professions, 30, 168-175.
50. Crabtree, J. L., Royeen, C. B. & Mu, K. (2001). The effects of learning through discussion in a course in occupational therapy: A search for deep learning. Journal of Allied Health, 30(4), 243-247.
51. Galt, K. A., Barr, C. C., Young, W. & Royeen, C.B. (2002). Are Doctor of Pharmacy students prepared for high technology learning? Pharmacy Education, (1), 145-157.
52. Royeen, C.B. (2002). Occupation reconsidered. Occupational Therapy International, 9(2), 112-121.
53. Royeen, C.B., Zardetto-Smith, A., Duncan, M. & Mu, K. (2001). What do young school-age children know about occupational therapy? An evaluation study. Occupational Therapy International, 8(4), 263-272.
54. Lohman, H. & Royeen, C. B. (2002). Post Traumatic Stress Disorder and Traumatic Hand Injuries: A Neuro-Occupational View. The American Journal of Occupational Therapy, 56(5), 527-537.
55. Zardetto-Smith, A., Mu, K., Phillips, C., Houtz, L. E. & Royeen, C. B. (2002). Brains Rule! Fun = Learning = Neuroscience Literacy. The Neuroscientist, 8(5), 396-404.
56. Mu, K., Royeen, C.B., Paschal, K. & Zardetto-Smith, A. (2001). Promoting awareness and understanding of occupational therapy and physical therapy in young school aged children: An interdisciplinary approach. Occupational Therapy in Health Care, 15(3/4), 89-99.
57. Royeen, C.B. & Luebben, A. J. (2003). Annotation bibliography of chaos for occupational therapy. Occupational Therapy in Health Care, 16(1), 63-80.

58. Royeen, C.B. & Mu, K. (2003). Stability of tactile defensiveness across cultures: European and American children's responses to the Touch Inventory for Elementary School Aged Children (TIE). Occupational Therapy International, 10(2), 166-175.
59. Royeen, C.B. (2003). Chaotic occupational therapy: Collective wisdom for a complex profession. 2003 Eleanor Clarke Slagle Lecturer. American Journal of Occupational Therapy, (57), 609-624.
60. Houtz, L.E., Kosoko-Lasaki, O., Zardetto-Smith, A., Mu, K. & Royeen, C.B. (2004). Teacher education professionals as partners in health science outreach. Journal of Allied Health, 33(3), 174-177.
61. Royeen, C. B. (2004). Trajectory towards the strange attractor of academic administration: Top ten vectors for plotting. Occupational Therapy in Health Care, (18), 188-190.
62. Mu, K., Chao, C.C., Jensen, G.M. & Royeen, C.B. (2004). Effects of interprofessional rural training on students' perceptions of interprofessional health care services. Journal of Allied Health, 33(2), 125-131.
63. Mu, K. & Royeen, C.B. (2004). Facilitating participation of students with severe disabilities: aligning school-based occupational therapy practice with best practices in severe disabilities. Physical and Occupational Therapy in Pediatrics, 24(3), 5-22.
64. Mu, K. & Royeen, C.B. (2004). Interprofessional or transprofessional services in school-based occupational therapy practice. Occupational Therapy International, 11(4), 244-247.
65. Siler, W.L. & Royeen, C.B. (2007). Guiding principles in a merger of allied health and nursing schools. Journal of Allied Health, 36 (1): 24-29.
66. Royeen, C.B. & Lavin, M.A. (2007). A contextual and logical analysis of the Clinical Doctorate for Health Practitioners: Dilemma, Delusion or Defacto. Journal of Allied Health, 36 (2): 101-106.
67. Luebben, A.J. & Royeen, C.B., (2007). Toward verstehen: An etymological and historical wave of the terms *habit*, *routine*, *occupation*, and *participation*. OTJR: Occupation, Participation and Health, Volume 27, Supplement, fall, 865s-866s.
68. Royeen, C.B. (2010). *Carpe Diem*: Towards an emerging understanding of morning routines. Irish Journal of Occupational Therapy. 37 (2), 25-29.
69. Royeen, C.B. (2010). Confessions of an occupational therapist who became an artist (Ode to Yerxa 2000). Irish Journal of Occupational Therapy, 37(2), 37 – 42.

70. Royeen, C.B., Jensen, G.M., Chapman, T.A., & Ciccone, T. (2010). Editorial: Is interprofessionality a threshold concept for education and health care practice? Theme issue on interprofessional education for Journal of Allied Health, 39(3 pt 2), 252-253.
71. Jensen, G.M., Royeen, C.B. & Purtilo, R.B. (2010). Interprofessional ethics in rehabilitation: The dreamcatcher journey. Theme issue on interprofessional education for Journal of Allied Health, 39(3 pt2), 247-251
72. Ruebling, I. & Royeen, C.B. (2010). Description of a model program: Saint Louis University Interprofessional Education (SLU-IPE). Theme issue on interprofessional education for Journal of Allied Health.
73. Eichler, J.R., Hoevet, R., & Royeen, C.B. (2015). OTonCampus©: A partnership between occupational therapy and the counseling center. Mental Health Special Interest Section Newsletter, Col 38, No. 4, pages 1-3.
74. Royeen, C.B., Brasic, J.R., Sethi, C., Dvorak, L, Provazniak, C., Seyed, O., (accepted for publication). “Brain Tells” as signals of brain dysfunction affecting daily life. Journal of Allied Health Education.
75. Royeen, C.B., Stein, F., Murtha, A., & Stambaugh, J. (submitted). Eudemonic care: A future path for occupational therapy? Occupational Therapy Health Care.
76. Royeen, C.B. (submitted) A short vignette on ponderings and wandering about qualitative inquiry: Drawings regarding the journey on reflexivity while conducting self-referenced case study research. AERA Qualitative SIG Newsletter.

OTHER PUBLICATIONS

1. Royeen, C.B., Slavik, B. & Garreton, I. (1991). Handbook of Sensory Integration for Parents. Cincinnati, Ohio: Southpaw Industries. Distributed by the American Occupational Therapy Association.
2. Royeen, C.B. (1992). Viewpoint: A personal experience with family centered care. In: “Foundations for Practice in the NICU and EI.,”E. Vergara (Ed.). Rockville, MD: American Occupational Therapy Association.
3. Consulting Editor, “Foundations for Practice in the NICU and EI” by E. Vergara (1992). Rockville, MD: American Occupational Therapy Association.
4. Royeen, C.B. (1994). Problem based learning in action: Key points for practical use. Education Special Interest Section Newsletter. Rockville, MD: American Occupational Therapy Association.
5. Royeen, C.B. (1996). Viewpoints: 20 years of occupational therapy: As much as things change, some things stay the same. OT WEEK, No. 7, page 60.

6. Royeen, C.B. (1998). Editorial: Four areas of sensory integrative scholarship for the next millennium. Occupational Therapy International, 5(4), 249-251.
7. Royeen, C.B. (1999). From the chairperson. Education Special Interest Section Quarterly, 9(3):1.
8. Royeen, C.B. (1999). Scholarship revisited: Expanding horizons and guidelines for evaluation of the scholarship of teaching. Innovations in Occupational Therapy Education, 1(1):x-xi.
9. Royeen, C.B. (2000). Theory to practice in occupational therapy education. Foreword in: Innovations in Occupational Therapy Education. (pp. vii-viii).
10. Kracher, B. & Royeen, C.B. (2000). Evaluation of the USWEST Academic Development and Technology Center's eFellows Program.
11. Reistetter, T. & Royeen, C.B. (2001). Report on a needs assessment for doctoral level education in occupational therapy. Education Special Interest Section, Vol. 11, No. 1, March, 1-4.
12. Royeen, C.B. (2001). Invited forward "I saw a bald eagle fly" for the text Interactive Reasoning in the Practice of Occupational Therapy, Schwartzberg, S., Prentice Hall: Saddle River, NJ
13. Royeen, C.B. (2002). Reflections on education and learning in occupational therapy for the 21st century. Invited essay for theme issue on education, Occupational Therapy in Health Care, 15(1/2), p 209-213.
14. Royeen, C.B. (2005). E-management: A survival guide. Academic Leader 21(10), 3-8.
15. Royeen, C.B. (2006). Integrity in research, teaching and service. Academic Leader, 22(4), p 6.
16. Royeen, C.B. (2009). Preface for *Eating Saint Louis: The Gateway City's Unique Food Culture*. Reedy Press: Saint Louis.
17. Royeen, C.B. (2009). Preface for *Frames of Reference in Pediatric Occupational Therapy* (2nd Edition) by Paula Kramer and Jim Hinojosa (Eds.).
18. Royeen, C.B. (2012) Seven steps for enriching ethics in academic leadership. Academic Leader, Volume 28, Number 11, pages 4, 5, and 6, November.

PRESENTATIONS:

1. Presented eighteen scholarly papers and workshops at the national level from 1976-1984.

2. Royeen, C.B. (1985). "Training Occupational Therapy Educational Managers for the Schools." A four-day workshop for occupational therapists in the schools sponsored by the District of Columbia Occupational Therapy Association, (Falls, Church, VA, August).
3. Royeen, C.B. (1985). P.L. 94-142: "Ten Years Later." Invited paper presentation at a commemorative conference sponsored by New York University for business and academia, (New York, NY, October).
4. Royeen, C.B. (1985). "Tactile Inventory for Preschoolers." Invited paper presentation for the Annual Conference for Physical and Occupational Therapy in the Schools, sponsored by the Virginia Department of Education, (Richmond, VA, November).
5. Royeen, C.B. (1986). "Instrumentation in Occupational Therapy." Invited paper presentation at a Maternal and Child Health funded workshop at Children's Hospital of Los Angeles, (Los Angeles, CA, January).
6. Royeen, C.B. (1986). "Comparison of Parametric versus Nonparametric Statistics." Paper presentation at the Educational Statisticians section of the Annual Conference of the American Educational Research Association, (San Francisco, CA, April).
7. Royeen, C.B. (1986). "Single Case Studies: Design, Methods and Analysis." Invited half-day workshop for the Army Medical Specialist Corps Research Course, (Leesburg, VA, August).
8. Royeen, C.B., & Fortune, J. (1987). "Purposive Sampling in Clinical Research." Paper presentation at the research section of the American Educational Research Association Annual Conference, (Washington, D.C., April).
9. Royeen, C.B. (1992). "Tactile Defensiveness: Advanced Concepts." Two day invited presentation to therapists. Paper presentation at the Research Forum of the Annual Conference of the American Occupational Therapy Association, (Indianapolis, IN, April).
10. Royeen, C.B. (1992). "Tactile Defensiveness Advanced Concepts." Two day invited presentation to International Society for Pediatrics, (Brixen, Italy, July).
11. Royeen, C.B. (1992). "Neurodevelopmental Treatment and the Clinician/Researcher." Invited workshop at the Fall Northeastern Regional Conference of the NDTA Association, (Mt. Laurel, NJ, and November 7).
12. Royeen, C.B. (1993). "Program Evaluation in Occupational Therapy." Invited presentation to the Fieldwork Council for University of Southern California Program in Occupational Therapy, (Los Angeles, CA, April 25).
13. Royeen, C.B. (1993). "Education in Occupational Therapy: What now, what next?" Invited presentation at the 75th Anniversary of Washington University Program in Occupational Therapy. (St. Louis, MO, May 6).

14. Royeen, C.B. (1993). "Educationally Oriented Therapy in the Schools." Two day workshop presentation sponsored by Garden State Therapy Services, (Cherry Hill, NJ July 22 and 23).
15. Royeen, C.B. (1994). "Educationally Oriented Therapy: What Next?" Two day workshop presentation sponsored by Professional Education Programs, (Kansas City, MO September 30 and October 1).
16. Royeen, C.B. (1994). "Allied Health/Occupational Therapy Workforce Issues". Invited presentation to the Task Force on Developmental Disabilities of the National Conference of State Legislators, (Washington, D.C., May 5).
17. Royeen, C.B. (1994) Moderator for Research Forum, American Occupational Therapy Association Annual Conference, (Boston, MA, July 11.)
18. Royeen, C.B., and Chandler, B.C. (1994). "Problem based learning at Shenandoah University." Paper presentation at the American Occupational Therapy Association Annual Conference, (Boston, MA.)
19. Royeen, C.B. (1995). "School Based Therapy." Two day invited workshop presentation at the Detroit Institute for Children. (Detroit, MI, March 7 and 8)
20. Royeen, C.B., and Salvatore, P. (1995). "Comparison of problem based learning in two occupational therapy curricula." Paper presentation at COE, American Occupational Therapy Association Annual Conference, (Denver CO , April 7)
21. Royeen, C.B., and Chandler, B. (1995). "An Innovative Training Program for School Based Therapists." Paper presentation at the American Occupational Therapy Association Annual Conference, (Denver, CO, April 10)
22. Royeen, C.B. (1995). "Discussant of Life Role Development after Spinal Cord Injury." Research Forum of the American Occupational Therapy Foundation 15th Annual Forum, (Denver, CO, April 10).
23. Royeen, C.B. (1995). "School Based Therapy." Two day workshop presentation at the annual conference of the New York Occupational Therapy Association. (Upstate, New York, October 7 and 8).
24. Royeen, C.B. (1995). "Sensory Diet for Infants and Children." Invited presentation to the Continuing Education Pediatric Group of Winchester Medical Center. (Winchester, VA, November 29).
25. Royeen, C.B. (1995). "School Based Therapy." Two day workshop presentation for Lewin Seminars. (Ellicott City, Maryland, December 1 and 2).

26. Royeen, C.B. (1996). "Sensory Integration Theory and Research Overview and Update." Two day workshop for the International Society for Pediatrics. (Munich, Germany, May 16 and 17).
27. Royeen, C.B. (1996). "School Based Practice for Occupational and Physical Therapists." Invited one day institute for the Philadelphia Public School Systems. (Philadelphia, PA, June 8).
28. Royeen, C.B. (1996). "A Case-Base Approach to Clinical Reasoning in School Based Practice." Sponsored by OT and PT Five County Task Force, Maryland State Board of Education and Howard Community College, (Columbia, MD, October 25).
29. Royeen, C.B. (1997). Invited workshop presentation on "The Tangled Web of Policy and Research: A How to Guide", Western Michigan University, (Kalamazoo, MI, March 15).
30. Royeen, C.B. (1997) Invited keynote speaker on "Research and Policy: Empirical Persuasion", 10th Annual Midwest Dean's Occupational Therapy Research Day, College of Health and Human Services and the Department of OT, Western Michigan University, (Kalamazoo, MI, March 14).
31. Royeen, C.B., Jensen, G., and Royeen, M. (1997). "Building Community: Collaborative Interdisciplinary Training among OT and PT with Native Americans in Rural Nebraska", State of Nebraska Minority Health Conference, Creighton University, (Omaha, NE, September 25).
32. Royeen, C.B. (1997). Invited address "Neuro-occupation" for annual conference of Nebraska State Occupational Therapy Association, Omaha, September 18.
33. Royeen, C.B., and Zardetto-Smith, A. (1997). Poster presentation of "Teaching Neuroscience using Learning Through Discussion." 27th Annual Meeting of the Society of Neuroscience, New Orleans, LA, October 21.
34. Royeen, C.B. (1997). Invited workshop presentation on "Playing with Neuroscience Knowledge." Special Interest Section Practice Conference of AOTA, Phoenix, AZ, November 16.
35. Royeen, C.B. (1997). Invited workshop presentation on "Clinical Reasoning Applied to School Based Practice." Special Interest Section Practice Conference of AOTA, Phoenix, AZ, November 16.
36. Royeen, C.B. (1998). "Clinical Reasoning in School-based practice." Afternoon presentation to Therapy providers of Omaha Public Schools. January 16.
37. Royeen, C.B. and Crabtree, J., and Baber B. (1998) One day institute at the AOTA Annual Conference, "Occupation DeClaimed: Decussion of Doing and Discovery." (Baltimore, MD) (April)

38. Royeen, C.B. (1998). "Scholarship Revisited." Invited keynote presentation at the 3rd Annual Interdisciplinary Conference, University of Southern Indiana School of Health Professions, (Evansville, IN, October 18).
39. Royeen, C.B. (1998). "Clinical Reasoning in school-based practice." Two day workshop presentation to Department of Education, State of Florida, Occupational and Physical Therapy Services. (Orlando, FL, December 5 & 6).
40. Jensen, G., and Royeen, C.B. (1998). Poster presentation in "Building Community among Native Americans." 1998 Leadership and Collaborative Practice Conference, HRSA and PPHR, HHS, Washington, D.C.
41. Jensen, G.M., Royeen, C.B., Galt, K., Turner, P., Cochran, T. & Duncan, M. (1999). "Outcomes research – from whose perspective? Deconstructing practice outcomes across health care professions." Presentation, Reconstruction of Outcomes Research, Advances in Qualitative Methods, (Edmonton, Alberta, Canada. February, 1999).
42. Jensen, G., Cochran, T., and Royeen, C.B. (1999). "Writing Case Reports." One-half day, pre-conference workshop at the Nebraska Physical Therapy Association Annual Conference, (Omaha, NE, March 25).
43. Royeen, C.B. (1999). "Tactile system processing and autism: Review and Research Update." International Society for Pediatrics, (Munich, Germany, June 1-8).
44. Royeen, C.B. and Jensen, G. (1999). "Current Successes in Collaboration Interactive Workshop." Invited presentation at the Department of Health and Human Services, Division of Associated, Dental and Public Health Professions (DADPHP) Cross Program Conference, (Las Vegas, June 28).
45. Royeen, C., Jensen, G., Cochran, T. & Duncan, M. (1999). "Integration matrix: Analysis of human service initiatives." Presentation at DADPDP Cross Program Grantee Conference, (Las Vegas, NV, June, 1999).
46. Cochran, T., Jensen, G.M., Duncan, M., & Royeen, C.B. (1999). "Cultural incompetence: When your best efforts are challenged." Presentation, American Physical Therapy Association Scientific Meeting and Exposition, (Washington, DC. June, 1999).
47. Royeen, C.B., Jensen, G., Duncan, M., Cochran, T. (1999). Poster Presentation in "Synergistic Strategies: Promoting Academic-Community Partnerships and Cultural Competence Across Disciplines." Department of Health and Human Services, Division of Associated, Dental and Public Health Professions (DADPHP) Cross Program Conference, (Las Vegas, June 28).
48. Royeen, C.B, and Duncan, M. (1999). Poster Presentation in "Neuro-occupation as a teaching heuristic. Society for Neuroscience Annual Meeting, (Miami, FL, October 25).

49. Stohs, S.J., and Royeen, C.B. (1999). Poster Presentation in “An Entry Level Clinical Doctorate in Occupational Therapy (OTD).” Association of Schools of Allied Health Professions Annual Meeting, (Atlanta, GA, October 22).
50. Royeen, C.B., Jensen, G., Duncan, M., Cochran, T. (1999). Poster Presentation in “Synergistic Strategies: Promoting Academic-Community Partnerships and Cultural Competence Across Disciplines.” St. Albert’s Day Ceremony, Creighton University, (Omaha, NE, November 2).
51. Jensen, G., Royeen, C.B. (1999). Poster Presentation in: Continuous Connection: Consortium for Rural Interdisciplinary Training”, St. Albert’s Day Ceremony, Creighton University, (Omaha, NE, November 2).
49. Crabtree, J.L., Royeen, C.B., and Mu, K. (2000) Poster Presentation in: “A Search for Deep Learning.” American Occupational Therapy Association, Inc. Annual Conference, (Seattle, WA, March 31-April 3).
50. Abreu, B., Florey, L., and Royeen, C.B. (2000) Workshop: “Putting Occupational Based Practice Into Fieldwork.” American Occupational Therapy Association, Inc. Annual Conference, (Seattle, WA, March 31-April 3).
51. Mu, K., Royeen, C.B., and Barrett, K. (2000) “Self-Assessment of Clinical Reasoning: A Way to Assess Clinical Reasoning.” Paper presentation, American Occupational Therapy Association, Inc. Annual Conference, (Seattle, WA, March 31-April 3).
52. Royeen, C.B. (2000). “The Pragmatical, Prairie Perspective: An Argument for Blended Methods in Occupational Therapy Research.” Panel Presentation at the 13th Annual Midwest Dean’s Research Day. University of Wisconsin-Milwaukee, (Milwaukee, WI, May 19-20).
53. Royeen, C.B. (2000). “Elaborating upon Occupation Using Chaos.” Paper presentation at The Canadian Association of Occupational Therapists Tri-Joint Congress, (Toronto, Canada, May 24-27).
54. Royeen, C.B. (2000). “Chaotic Elaboration on Occupation.” Paper presentation at the 10th Annual International Conference of the Society for Chaos Theory in Psychology and Life Sciences, University of Pennsylvania, (Philadelphia, PA, July 20-23).
55. Royeen, C.B. (2000). “Reconstructing Occupation Using Chaos.” Paper presentation at the VIth European Congress of Occupational Therapy, (Paris France, September 27-29).
56. Royeen, C.B. (2000). “European Update on Sensory Integration, 2000.” Gesellschaft for sensorische Integration – Jean Ayres – Deutschlund, (Munich, Germany, October 2-5).
57. Royeen, C.B., Mu, K., and Zardetto-Smith, A.M. (2000). Poster presentation in: “Brains Rule! Neuroscience Expositions.” Society for Neuroscience Annual Meeting, (New Orleans, LA, November 5-10).

58. Zardetto-Smith, A.M., Mu, K., Ahmad, S.O. and Royeen, C.B. (2000) Poster Presentation in: "When the Subject Matter is Grey Matter: How Neuroscientists and Health Professionals Engage Children's Learning About the Brain and Nervous System." Society for Neuroscience Annual Meeting, New Orleans, LA, November 5-10.
59. Phelps, C.L., Royeen, C.B., and Zardetto-Smith, A.M. (2000). Poster Presentation in: "An Interactive Web Site to Teach Kids the Science of the Brain." Society for Neuroscience Annual Meeting, New Orleans, LA, November 5-10.
60. Duncan, M., and Royeen, C.B. (2000). Poster Presentation in: "Grounded Learning in Context: Neuro-Occupation." Society for Neuroscience Annual Meeting, New Orleans, LA, November 5-10.
61. Royeen, C.B., and Zardetto-Smith, A. (2000). Ancillary Event, "First Annual Neuro-Occupation Social." Presentations by Maureen Duncan and Christine Block. Society for Neuroscience Annual Meeting, New Orleans, LA, November 7.
62. Royeen, C.B., Mu, K., and Zardetto-Smith, A.M. (2000). Poster presentation in: "Brains Rule! Neuroscience Expositions." Creighton University St. Albert's Day and American Association for Advancement of Science Annual Midwest Meeting, Omaha, NE, November 20.
63. Zardetto-Smith, A.M., Mu, K., Ahmad, S.O. and Royeen, C.B. (2000) Poster Presentation in: "When the Subject Matter is Grey Matter: How Neuroscientists and Health Professionals Engage Children's Learning About the Brain and Nervous System." Creighton University St. Albert's Day and American Association for Advancement of Science Annual Midwest Meeting, (Omaha, NE, November 20).
64. Phelps, C.L., Royeen, C.B., and Zardetto-Smith, A.M. (2000). Poster Presentation in: "An Interactive Web Site to Teach Kids the Science of the Brain." Creighton University St. Albert's Day and American Association for Advancement of Science Annual Midwest Meeting, (Omaha, NE, November 20).
65. Duncan, M., and Royeen, C.B. (2000). Poster Presentation in: "Grounded Learning in Context: Neuro-Occupation." Creighton University St. Albert's Day and American Association for Advancement of Science Annual Midwest Meeting, (Omaha, NE, November 20).
66. Kracher, B., and Royeen, C.B. (2000). "Evaluation of an Innovative faculty Program for Information Technology in Teaching." Creighton University, College of Business Administration, (Omaha, NE, December 1)
67. Royeen, C.B. (2001). "Terror of technology in research." Invited research series, University of South Dakota, (Vermillion, SD, February 22).

68. Royeen, C.B. (2001). "Cross cultural perception of tactile defensiveness using the Touch Inventory for Elementary School Aged Children (TIE): A Pilot study." 14th Annual Midwest Dean's Occupational Therapy Research Conference, (Milwaukee, WI, March 9-10).
69. Royeen, C.B., Jensen, G., Lyons, K.J. (2001). "Academic-Community Partnerships: A "Hands-on: How-to" Guide. Institute 07, The American Occupational Therapy Association Annual Meeting, (Philadelphia, PA, April 18).
70. Royeen, C.B. (2001). "Annotated Bibliography of Chaos for Occupational Therapy." A Poster Presentation at the American Occupational Therapy Association Annual Meeting, (Philadelphia, PA, April 20).
71. Royeen, C.B. (2001). "MetaEmotion of Occupation: A New Twist for Mental Health." A Poster Presentation at the American Occupational Therapy Association Annual Meeting, (Philadelphia, PA, April 20).
72. Royeen, C.B. (2001). "Sensory Integration across Disciplines: An Update." A presentation given at the Pediatric Rehabilitation Therapy Update, Childrens National Medical Center, (Washington, DC, June 8 & 9).
73. Royeen, C.B. (2001). "Cross-Cultural Perceptions of Tactile Defensiveness Using Touch Inventory of Elementary and School-Aged Children (TIE): A Pilot Study." A presentation given at the Pediatric Rehabilitation Therapy Update, Childrens National Medical Center, (Washington, DC, June 8 & 9).
74. Jensen, G. M., Cochran, T.C., Royeen, C. B. & Duncan, M. (2001). "Insights into student experience in a cross cultural interdisciplinary setting: Role of qualitative methods." Presentation, American Physical Therapy Association Annual Conference and Exposition, (Anaheim, CA, June).
75. Zardetto-Smith, A. M., and Royeen, C. B. (2001). Poster presentation "Fun Plus Interest = Learning: Do fun activities teach children about neuroscience?" Presented at the 31st Annual Meeting of the Society of Neuroscience, (San Diego, CA, November 10-15).
76. McCormick, J. B., Dickerson, M.R., Smith, P.A., Royeen, C., and Zardetto-Smith, A. M. (2001). Poster presentation: "The 1st Annual Ann Arbor BrainsRule! Neuroscience exposition." Presented at the 31st Annual Meeting of the Society of Neuroscience, (San Diego, CA, November 10-15).
77. Royeen, C. B. (2002). Poster presentation: "Students on line: Time on task for a 3 semester hour class." Presented at the 15th Annual Midwest Deans' Occupational Therapy Research Conference, (Omaha, NE, March 8-9).
78. Jensen, G., Royeen, C., Arndt, J. (2002). "A Qualitative approach to best practice in interdisciplinary, rural health care." National Academies of Practice (NAP) and the Interdisciplinary Health Care Team (IHCT) Conference, (Arlington, VA, April 12-13).

79. Monaghan, M. S., & Royeen, C. B. (2002). "Formative assessment of the initiation of a web-based entry-level pathway for the Doctor of Pharmacy degree." *Disciplinary Styles in the Scholarship of Teaching and Learning*, (Kansas City, MO, April 19-20).
80. Royeen, C. B. (2002). "Occupation Reconsidered." American Occupational Therapy Association Annual Conference, (Miami Beach, FL, May 5).
81. Royeen, C. B. (2002). "Making Sense of the Sensory Integrative Literature 1998-2001." American Occupational Therapy Association Annual Conference, (Miami Beach, FL, May 3).
82. Royeen, C. B. (2002). Poster presentation: "Cross Cultural Examination of Tactile Defensiveness via Touch Inventory for Elementary School Aged Children." American Occupational Therapy Association Annual Conference, (Miami Beach, FL, May 2).
83. Royeen, C. B. (2002). Short course: "OTA: Future Directions." American Occupational Therapy Association Annual Conference, (Miami Beach, FL, May 5).
84. Royeen, C. B. (2002) Poster presentation: "Making Sense of the Sensory Integrative Literature 1998-2001." 13th World Congress of Occupational Therapists, (Stockholm, Sweden, June 23-28).
85. Royeen, C. B. (2002) Paper presentation: "Rood Reconsidered." 13th World Congress of Occupational Therapists, (Stockholm, Sweden, June 23-28).
86. Royeen, C. B. (2002) Paper presentation: "Reconstruction of Occupation Using Chaos." 13th World Congress of Occupational Therapists, (Stockholm, Sweden, June 23-28).
87. Royeen, C. B. (2002). "Tactile defensiveness: Preliminary Research on Cross Cultural Dimensions and Self Esteem in Children." Invited speaker at "Sensory Integration Today: Research, Theory and Practice: A Tribute to Ginny Scardina," at the Cincinnati Children's Hospital Medical Center, Cincinnati, Ohio. Sponsored by the Ohio Occupational Therapy Association, Xavier University and Cincinnati Children's Hospital Medical Center, August 24-25, 2002.
88. Zardetto-Smith, A., Mu, K., Royeen, C. (2002). "Brains Rule!" Presentation at Bio China 2002 China International Biology Projects Fair, (Beijing, China, August 28-31).
89. Royeen, C. B. (2002). "Practice Based Evidence and Natural Environments: Looking to the Past for Best Practice in the Future." Keynote address at the Contemporary Practices in Early Intervention for Pediatric Therapists. Sponsored by Thomas Jefferson University and Early Intervention Technical Assistance, Department of Public Welfare, US Department of Health and Human Services, (September 27-28).
90. Royeen, C. B. (2002). "Tactile Defensiveness: Cultural Stability, Parental View and Self Esteem in Children." Invited presentation at the Contemporary Practices in Early

- Intervention for Pediatric Therapists. Sponsored by Thomas Jefferson University and Early Intervention Technical Assistant, Department of Public Welfare, US Department of Health and Human Services, (September 27-28).
91. Royeen, C. B. (2002). "Evidence based practice: Good for most of the people, most of the time, but may be limited in applicability for a reason person at any point in time . . . "Roundtable discussion at the Contemporary Practices in Early Intervention for Pediatric Therapists. Sponsored by Thomas Jefferson University and Early Intervention Technical Assistant, Department of Public Welfare, US Department of Health and Human Services, (September 27-28).
 92. Zardetto-Smith, A. M., Royeen, C. B., Houtz, L., Mu, K., and Phelps, C. L. (2003). Poster presentation: "Brains Rule! Neuroscience Expositions: A Model Project Defines and Increases Neuroscience Literacy." AAAS Annual Meeting, (San Diego, Ca Feb 14 – 18).
 93. Zardetto-Smith, A. M., Royeen, C. B., Duncan, M., Mu, K., and Houtz, L. (2003). Poster presentation: "Cultural adaptation of a neuroscience education outreach project: Brains Rule! Neuroscience Expositions at the Omaha and Winnebago Nations." AAAS Annual Meeting, (San Diego, CA, February 14-18).
 94. Royeen, C. B. (2003). Plenary Speaker: "Chaotic Occupational Therapy." 16th Annual Midwest Deans' Occupational Therapy Research Conference. Creighton University, (Omaha, NE, March 7-8).
 95. Royeen, C. B. (2003). "Chaotic Occupational Therapy." Invited speaker at Nebraska Occupational Therapy Association Meeting, (Omaha, NE, April 29).
 96. Royeen, C.B. (2003). "Linking Academia and Practice for Research." Presented at the Ninth Annual Summer Institute of Psychosocial Trauma, University of Missouri, (Columbia, MO, July 13).
 97. Royeen, C.B. (2004). Herstory: Then and Now. Paper presentation at the AOTA Annual Conference (Minneapolis, MN, May 22).
 98. Royeen, C.B. (2004). Play and sensory integration treatment. Gesellschaft fur sensorischi Integration – Jean Ayres, Deutschland und International e. V. (GSID), Symposium, June 26, 2004.
 99. Siler, W. & Royeen, C.B. (2004). The realities of academic mergers: Arranged marriages, marriages of convenience, and true love. Paper presentation at the 2004 Annual Conference Association of Schools of Allied Health Professions, (Tampa, FL, Thursday, October 31).
 100. Royeen, C.B., Purtilo, R., & Jensen, G. (2004). Ethics, ethos and evaluation: Towards the next generation of Moral Reasoning. Poster presentation at the 4th Hispanic Congress of Health Related Professions; 1st Multidisciplinary Clinical Research Conference;

- Annual Meeting of NACNAH, (San Juan, Puerto Rico, November 21).
101. Royeen, C.B. (2005). Leadership, Chaos Theory and Quilting. Invited keynote presentation at the Kentucky Occupational Therapy Annual Conference, (Paducah, KY, August 15).
 102. Royeen, C.B., Jensen, G.M., Purtilo, R. (2005). "Preparing practitioners for a Lifetime of Moral Action. Paper presentation at the 2005 ASAHP Annual Conference, Friday, Houston, TX, October 21).
 103. Royeen, C.B., Jensen, G.M., and Harvan, R. (2005). "Expanding Allied Health Roles: Leadership in Rural, Interprofessional Practice." Poster presentation at the 2005 ASAHP Annual Conference, (Houston, TX, October 20).
 104. Royeen, C.B., and Lavin, M.A. (2005). Expanding roles of Allied Health Practitioners via the Clinical Doctorate: Dilemma, Delusion or Defacto. Paper presentation at the 2005 ASAHP Annual Conference, (Houston, TX, October 19).
 105. Sayre-Stanhope, D., Cook, K. and Royeen, C.B. (2005). Is evidence enough? Educator roundtable forum presentation at Association of Physician Assistant Programs (APAP) Annual Meeting, (Las Croabas, Puerto Rico, November 6).
 106. Royeen, C.B. and Lavin, M.A. (2006). Interprofessional thought as fabric: A philosophical analysis. Paper presentation at All Together Better Health, Imperial College, (London, England, April 11).
 107. Royeen, C.B. and Luebben, A.J. (2006). Leadership in a complex world: Surfing the edge of chaos. Poster presentation at America Occupational Therapy Association Annual Conference, (Charlotte, NC, April 29).
 108. Royeen, C.B. (2006). Evidence based practice: The tyranny of the majority over the "n-of-1". Paper presentation at the World Federation of Occupational Therapists 14th Congress, (Sydney, Australia, July 23-28).
 109. Royeen, C.B. (2006). Neuro-occupation: Occupational shaping of the brain. Poster presentation at the 14th World Federation of Occupational Therapists Congress, (Sydney, Australia, July 23-28).
 110. Royeen, C.B. (2006). An inquiry based approach to evaluation. Invited lecture to a grant writing course co-sponsored by Doisy College and the Graduate School. (St. Louis, Missouri, September 28).
 111. Royeen, C.B. (2006). Words as determinants of ideas in interprofessional practice. Paper Presentation at ASAHP Annual Conference, (Chicago, IL, October 18-20).

112. Royeen, C.B., and Ruebling, I. (2007). Interprofessional Curriculum for Health Care Professionals, The Third Conference on Safety Across High-Consequence Industries, Saint Louis University, (St. Louis, MO, March 13).
114. Royeen, C.B., and Luebben, A.L. (2007). Towards verstehen: An etymological and historical web of the terms Habit, Routine, Occupation, Participation, and Rehabilitation. Poster presentation at Habit and Rehabilitation Promoting Participation. Asilomar Conference Center, (Pacific Grove, CA, January 31 – February 4).
115. Royeen, C.B., and Terhaar, Elizabeth (2007). Neuro-occupation: Occupational Shaping of the Brain. Paper presentation at the American Occupational Therapy Association Annual Conference, (St. Louis, MO, April 20).
116. Royeen, C.B., (2007). Panelist for “Defining yourself in occupational therapy: Life’s journey professionally and personally. Doctoral Network meeting at the American Occupational Therapy Annual Conference, (St. Louis, MO, April 19).
117. Royeen, C.B. (2007). Power, passion and politics: The wisdom of the Eleanor Clarke Slagle Lecturers. Occupational Therapy Annual Conference, St. Louis, MO, April 20.
118. Luebben, A.L. and Royeen, C.B (2007). Routine redesign: changing habits one at a time. Poster presentation at Occupational Therapy Annual Conference, (St. Louis, MO, April 21).
119. Kyler, P., Luebben, A.L., Royeen, C.B., and Wells, S. (2007). Educating for Moral Action: The teaching of ethics and the ethics of teaching. Workshop presentation at Occupational Therapy Annual Conference, (St. Louis, MO, April 23).
120. Jensen, G., and Royeen, C.B. (2007). Workshop presentation in Case Study Methodology, 13th Annual Qualitative Health Research Conference, EWHA Woman’s University, (Seoul, Korea, June 20).
121. Royeen, C.B., and Jensen, G. (2007). Keynote presentation on “Looking beyond the challenges and opportunities of qualitative research. 13th Annual Qualitative Health Research Conference, Ewha Woman’s University, (Seoul, Korea, June 21).
122. Royeen, C.B., and Ruebling, I (2007). Paper presentation on Saint Louis University Hybrid Model of Interaction Education, American Association of Schools of Allied Health Professions, (San Diego, CA, October 19).
123. Royeen, C.B. (2007). Considering applied anthropology and occupational science: Themes, theory and threat. Paper presentation at the American Anthropology Association 106th Annual Meeting, (Washington, D.C., November 6).
124. Royeen, C.B., and Cochran, T. (2008). Using action research. Invited presentation at Catholic Health Care Conference. Saint Catherine’s University; St. Catherine University. (St. Paul, MN, April 20).

125. Royeen, C.B. (2008). Invited, all day workshop for 10th Anniversary of Shenandoah University Department of Occupational Therapy, on Neuro-occupation. (Winchester, VA, October 25).
126. Royeen, C.B. (2008). Invited, all day workshop for faculty of Creighton University Department of Occupational therapy on Neuro-occupation. (Omaha, NE, February 5).
127. Royeen, C.B. (2008). Virtue ethics as a foundation for peace. Paper presentation at the 13th Annual World council for Curriculum and Instruction, (Antalya, Turkey, September 2).
128. Royeen, C.B. (2008). Paper presentation. Interprofessional health education and practice: History, review and recommendations for professional education agencies. American Association of Schools of Allied Health, (Baltimore, MD, October 30).
129. Royeen, C.B. (2009). Synthesis of the sensory integration literature 2003-2008. Key note presentation Gesellschaft fur sensorische Integration – Jean Ayres, Deutschland und International e. V. (GSID), Symposium, (Munich, Germany, November 15).
130. Royeen, C.B. (2009). Invited, all day workshop for at Louisiana State University Academic Health center on Neuro-occupation. (Shreveport, LA., January 25).
131. Luebben, A.L. & Royeen, C.B. (2009). The Hero approach: A new dawning for occupation based intervention. Peer reviewed short course presentation at the Annual Conference of the American Occupational Therapy Association. (Houston, TX, April 24).
132. Royeen, C.B. (2009). Invited Keynote Lecture: Confessions of an occupational therapist who became an artist. Association of Occupational Therapists of Ireland, (Kilkenny, Ireland, April 29).
133. Royeen, C.B. (2009). Invited workshop: Tactile defensiveness and self esteem in children. Association of Occupational Therapists of Ireland, (Kilkenny, Ireland, April 29).
134. Goulet, C., Cochran, T.M., Jensen, G.M., Royeen, C.B., & Harvan, R.A. (2009). Paper presentation: The integrative and interactive relationships between IPE and practice. Collaborating Across Borders II: An international dialogue on interprofessional health education, research, policy and practice. (Halifax, Nova Scotia, May 20).
135. Jensen, G.M., Royeen, C.B., Purtilo, R., Swisher, L., & Natlette, E. (2009). Paper presentation: Working together to learn together: A model for building collaborative learning community in rehabilitation ethics. Collaborating Across Borders II: An international dialogue on interprofessional health education, research, policy and practice. (Halifax, Nova Scotia, May 21).
136. Swisher, D., Natlette, E., Jensen, G.M., and Royeen, C.B. (2009). Teaching Ethics in the

- Curricula. Peer reviewed institute presentation for the combined sections meeting of the American Physical Therapy Association, (San Diego, CA, February).
137. Royeen, C.B. (2010). Mixed methods for occupational therapy research. Invited keynote for the Midwest Deans Annual Conference, (St. Louis, MO, March).
 138. Royeen, C.B. (2010). Complexity and Dynamical Systems in Quality Occupational Therapy Management. American Occupational Therapy Association Workshop, (Orlando, FL, May).
 139. Royeen, C.B. (2011). Interprofessional education: Here, now and evermore. Quinnipiac University Workshop (full day) (Hamden, CT, January).
 140. Royeen, C.B. (2011). Engagement in Occupation is Participation. Virginia Occupational Therapy Association School System Symposium, (Richmond, VA, March).
 141. Royeen, C.B. (2011). Keynote speaker for the 75th Anniversary of the School of Pharmacy and Health Professions, Creighton University, Omaha, NE.
 142. Royeen, C.B., and Sethi, Chetna (2011). “Of human bondage – A neglected construct in occupational science: The relationship of pain to occupational deprivation. Paper presentation at the 10th Annual Meeting of the Society for the Study of Occupational Science (SSO): USA, Park City, Utah, October 21.
 143. Royeen, C.B., Seyed, O., and Sethi, C. (2011). Publication oriented neuroscience literacy: A functional approach introducing a heuristic for “early warning” of brain dysfunction affecting daily life. Paper presentation at the Association of Schools of Allied Health Professions Annual Conference, New Orleans, October, 2011.
 144. Luebben, A., Peters, C., Pierce, D., Price, P., and Royeen, C.B. (2012). Drivers of change: A vision for the future of occupational therapy in 2050. American Occupational Therapy Association Annual Meeting, 3 hour workshop, Indianapolis, April 2012.
 145. Kramer, P.K, and Royeen, C.B. (2013). Innovations in developing practioners in the field. American Occupational Therapy Educational Innovation Institute paper presentation, Atlanta, BA, Nov., November 11.
 146. Royeen, C.B., (2014). Mentoring – pass it on. Keynote presentation sponsored by the occupational therapy program for OT Month at the University of Texas Pan-Am. Edinburg, TX, April 23.
 147. Harvin, R., and Royeen, C.B.(2014). Interprofessional Education: The Plexus for the next generation. Key note presentation at the MCPHS in Boston, MA, May 6.
 148. Muir, S., and Royeen, C.B. (2015). Collaborative or team teaching in action. Rheinert Center for Teaching and Learning, Saint Louis University, January 8.

149. Royeen, C.B. Provazniak, C., & Seyed, O. (2015). Neuroscience literacy and Brain Tells, American Occupational Therapy Association Annual meeting, 3 hour workshop, Nashville, TN, April 2015).
150. Royeen, C.B. (2015) Renaissance of adolescence in the third stage of life: A self-referenced case study. Annual Meeting of the Society for the Study of Occupational Science (SSO): Fort Lauderdale, FL October 21, 2015.
151. Royeen, C.B., Royeen L. & Provaznik, C. (2016). Advancing Occupational Therapy Practice Past, Present and Future: Snapshots of occupational therapy from 1976, 2016 and 2066. Poster presentation, AOTA Annual Meeting Chicago, IL April 2016.

AREAS OF ONGOING RESEARCH AND SCHOLARSHIP:

- Sensory processing and function/occupation
- Neuroscience literacy
- Leadership in education and administration
- Qualitative and quantitative research design/program evaluation
- Accreditation and curriculum development (including on-line learning)

Dr. Deborah Waddill—BIO, 2016

Dr. Deborah Waddill is a proven leader and skilled communicator who leverages her expert knowledge, collaborative spirit, and technology acumen to develop leaders through designing and delivering customized instruction. Dr. Waddill is the Director of Leadership Courseware at The George Washington University School of Medicine and Health Sciences where she is also an Adjunct Associate Professor. Additionally, Dr. Waddill teaches for GWU's School of Education and Leadership and Rutgers University's School of Management and Labor Relations. Her commitment to learning earned the Alpha Eta Award in recognition of "high attainments in the areas of scholarship, service and fellowship among health professionals" (2012).

As President of Restek Consulting LLC, Dr. Waddill develops mentoring, coaching and executive development programs for delivery online, face-to-face and in blended environments such as the leadership course for the American Physical Therapy Association's Educational Leadership Institute. She offers practical skills of Human Resources digital strategic design, program evaluation and re-design, and project-based design of online, blended, and face-to-face instruction. Deborah guides clients through the selection of Human Resource technologies customized to the organization including, most recently, Panasonic North America. Dr. Waddill delineates her technology selection approach in the book she co-authored entitled *The e-HR Advantage* (2011). Speaking at conferences and publishing scholarly articles complete Deborah's portfolio; she addresses topics such as emerging leadership theories, empowering HR technologies, leadership development through Action Learning, and leading edge performance management methods.

CURRICULUM VITAE

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Creighton University
Dean, Graduate School and College of Professional Studies
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EDUCATION

1969-1973 B.S., Education, University of Minnesota, Minneapolis, MN
1974-1978 M.A., Physical Therapy, Stanford University, Stanford, CA
1982-1987 Ph.D., Education, Curriculum and educational evaluation; minor field: sociology, Stanford University, Stanford, CA (Dissertation chair; Dr. Lee Shulman)

1978-79 Postgraduate Course in Proprioceptive Neuromuscular Facilitation, Kaiser Foundation Rehabilitation Center, Vallejo, California

1995-97 Georgetown University, Kennedy Institute of Ethics, Washington, DC
Intensive Bioethics Course XXI. June 4-10, 1995
Advanced Bioethics Course VII. March 9-13, 1996
Advanced Bioethics Course VIII. March 9-13, 1996

2000-2001 USWest Technology Fellowship, Creighton University
2006 Summer Institute for Women in Higher Education Administration
Bryn Mawr College

PROFESSIONAL LICENSURE

(1993-present) Nebraska Physical Therapist: PT #1183
(1978-present) California Physical Therapist: PT #008685

EMPLOYMENT

- 1993-Present Creighton University, Omaha, Nebraska.
- Dean, Graduate School and College of Professional Studies, Vice Provost for Learning and Assessment; Professor of Physical Therapy, Faculty Associate, Center for Health Policy and Ethics.
 - Associate Dean for Faculty Development and Assessment, October 2002- July 2006; School of Pharmacy and Health Professions
 - Professor, Department of Physical Therapy, 2000-present
 - Director, Transitional Doctor of Physical Therapy Program, September 1999-October 2002
 - Founding Director, Office for Interprofessional Service and Scholarship, August 2001-May 2003; Administrative liaison 2003-present
 - Interim Vice Chair, Department of Physical Therapy, August 2001-October 2002
 - Faculty Associate, Center for Health Policy and Ethics, January 1999-present
 - Teaching Associate, Office of Excellence in Teaching, Learning, and Assessment, Creighton University, 2002-2004
 - Associate Professor/Professor, (joint appointment) Department of Occupational Therapy, July 1996-present
 - Associate Professor, Department of Physical Therapy, August 1993-1999
- 1991-1993 Samuel Merritt College, Oakland, California
- Associate Professor and Research Coordinator, Department of Physical Therapy
 - Visiting Associate Professor, Department of Physical Therapy, Samuel Merritt College. 1993-94
- 1988-1991 The University of Alabama at Birmingham, School of Health-Related Professions, Birmingham, Alabama
- Associate Professor(tenured); Director Post-professional master's degree program, Division of Physical Therapy, 1989-91
 - Assistant Professor, Division of Physical Therapy, 1988-1989
 - Scientist, UAB Division of Immunology and Rheumatology, School of Medicine, Multipurpose Arthritis Center, and Injury Prevention Research Center, 1989-1991
 - Visiting Associate Professor, UAB Division of Physical Therapy, 1992-96
- 1987 Temple University, College of Allied Health Professions, Philadelphia, PA
- Assistant Professor, Department of Physical Therapy, 1987
 - Physical Therapist, Philadelphia Institute for Physical Therapy, Philadelphia, summer 1987

- 1985- 1986 Stanford University Hospital, Physical and Occupational Therapy Dept, Outpatient Services, Stanford, California
- Clinical Specialist
- 1981-1985 Stanford University, Division of Physical Therapy, Stanford University School of Medicine, Stanford, California
- Senior Lecturer, 1983-1985
 - Lecturer (full time faculty member)

Clinical Physical Therapist Positions:

- 1993-1997 Physical Therapist- Biweekly consultation and clinical service delivery; Omaha Tribe Carl T. Curtis Health Center (Macy, NE) and Winnebago Tribe - Winnebago US Public Health Hospital (Winnebago, NE)
- 1982-1985 Physical Therapist, Brady Physical Therapy - Sports Medicine Clinic, Foster City, CA; Menlo Medical Clinic, Menlo Park, CA; summers (part-time).
- 1981-1985 Physical Therapist, Stanford University Hospital, Stanford, CA
- 1980-1981 Staff therapist (half-time); Lecturer, (part-time), Division of Physical Therapy, Stanford University School of Medicine
- 1978-1979 Physical Therapist, Kaiser Foundation Rehabilitation Center Vallejo, CA
- 1979-1980 Physical Therapist, Menlo Medical Clinic, Menlo Park, CA,
- 1973-1976 Physical Education Teacher, St. Paul Academy and Summit School, St. Paul, Minnesota

Adjunct Faculty Appointment:

- 2013-present Adjunct Professor, Charles Sturt University, Education for Practice Institute, Sydney, Australia

PUBLICATIONS

Articles

Jensen GM, Nordstrom T, Segal R, McCullum C, Graham C, Greenfield B. Education Research: Visions of the Possible, *Phys Ther* (accepted for publication/June 2016)

Furze J, Tichenor CJ, Fisher B, Jensen GM, Rapport MJ. Physical therapy residency and fellowship education: reflections on the past, present and future. *Phys Ther*. 2016;96: DOI: 10.2522/ptj.20150473

Greenfield B, Jensen GM, Delany C, Mostrom E. The Power and Promise of Narrative for Advancing Physical Therapist Education and Practice. *Phys Ther* ; 2015; 95; 95: 924-933.

Furze J, Black L, Hoffman J, Barr JB, Cochran T, Jensen G. Exploration of S Reasoning Development in Entry-Level Physical Therapy Education. *Journal of Physical Therapy Education*; 2015; 29(3): 22-33.

Furze J, Black L, Cochran T, Gale J, Jensen G. Clinical Reasoning: Development of a Grading Rubric

for Student Assessment. *Journal of Physical Therapy Education*. *Journal of Physical Therapy Education*; 2015; 29(3): 34-45.

Furze J, Kenyon L, Jensen GM. Connecting Classroom, Clinic, and Context: Clinical Reasoning Strategies for Clinical Instructors and Academic Faculty. *Pediatric Physical Therapy*. 2015; 27(4):368-375.

Furze JA, V M\ " \ = 'U 'u " K'K '8U)
Process of Clinical Reasoning: A Pediatric Case Study Utilizing a Model of Enablement. *Physiotherapy Theory and Practice*. 2013; 29: 222-231. .

Hayward LM, Black LL, Mostrom E, Jensen GM, Ritzline PD, Perkins J. The first two years of practice: A longitudinal perspective on learning and professional development of promising novice physical therapists. *Phys Ther*. 2013; 93: 369-383.

Greenfield B, Jensen GM. Phenomenology: A Powerful Tool for Patient-Centered Rehabilitation. *Physical Therapy Reviews*. 2012; 17:417-424

Jensen GM, Greenfield B. Ethics Education: Developing Habits of Mind Through Pedagogical Content Knowledge. Invited paper. 2012; *Phys Ther Reviews*. 17:149-156

Jensen GM, Randall AD, Wharton M. Cognitive Impairment in the Older Adult: The Role of Ethical Mindfulness. Invited paper. *Topics in Geriatric Rehabilitation*. 2012; 28: 163-170.

Furze JA, Black L, Peck K, Jensen G. Student Perceptions of a Community Engagement Experience: Exploration of Reflections on Social Responsibility and Professional Formation. *Physiotherapy Theory and Practice*. August 2011; 27(6):411-421.

Doll J, Packard K, Furze J, Hugget K, Jensen G, Jorgensen D, Wilkin M, Hardeep C, Maio A, Yongue Q. Reflections from an Interprofessional Education Experience: Evidence for the Core Competencies for Interprofessional Collaborative Practice. *Journal of Interprofessional Care*. 2012; 1-3.

Packard K, Hardeep C, Maio A, Doll J, Furze J, Huggett K, Jensen G, Wilken M, Youngue Q. Interprofessional Team Reasoning Algorithm: A Tool for Case Study Analysis with Health Professions Students. *Journal of Research in Interprofessional Practice Education*. 2012; 2.3: 250-263.

Jensen G.M. Forty-Second Mary McMillan Lecture. Learning: what matters most. *Phys Ther*, 2011; 91;1674-1691.

Black L, Jensen G, Mostrom E, Perkins J, Hayward L, Ritzline P, Blackmer B. Exploration of the Development of Novice Physical Therapists. *Phys Ther*. 2010 ;90 :1758-1773.

Jensen GM, Royeen CB, Purtilo RB. Interprofessional Ethics in Rehabilitation : The Dreamcatcher Journey. *J Allied Health*. 2010 ;39(3): 246-250

Royeen CB, Jensen GM, Chapman T, Ciccone T. Is Interprofessionality a Threshold Concept for Education and Health Care Practice ? *J Allied Health*. 2010 ;39(3) : 251-252.

Greenfield B, Jensen G. Understanding the Lived Experience of Patients : The Application of a Phenomenological Approach to Ethics. *Phys. Ther.* 2010 ; 90 : 1185-1197.

Greenfield B, Jensen G. Beyond a Code of Ethics : Phenomenological Ethics for Everyday Practice. Invited paper. *Physiotherapy Research International*. 2010 ; 15(2) : 88-95.

Delany C, Edwards I, Jensen G, Skinner E. Closing the gap between ethics knowledge and practice through active engagement : an applied model of physical therapy ethics. *Physical Therapy*. 2010; 90: 1068-1078.

Hughes M, Laubscher K, Black L, Jensen GM. Use of Deconstructed Cases in Physical Therapist Ethics Education : An Assessment of Student Learning. *Journal of Physical Therapy Education*. 2009 ;23 (1):22-28. (recipient of the Stanford Award for outstanding paper in 2010)

Jensen GM, Richert A. Reflection on the Teaching of Ethics in Physical Therapist Education: Integrating Cases, Theory and Learning. *Journal of Physical Therapy Education*. 2005;19(3): 78-83

Haddad A, Jensen GM. Scholarship of Teaching and Learning in Physical Therapist Education. Guest editorial. *Journal of Physical Therapy Education*. 2005;19(3): 3,4.

Edwards I, Jones M, Higgs J, Trede F, Jensen GM. What is Collaborative Reasoning? *Advances in Physiotherapy Practice*, 2004;6:70-83.

Edwards I, Jones M, Carr J, Braunack-Mayer A, Jensen GM. Clinical reasoning strategies in physical therapy. *Physical Therapy*. 2004; 84: 312-335.

Jensen GM. Editorial: Wisdom of Practice. *Advances in Physiotherapy*. 2004; 6:1-2.

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Perceptions on Interprofessional Health Care Services. *Journal of Allied Health*. 2004; 33:125-131.

Stohs S, Jensen GM, Paschal K. Clinical Doctoral Education in Physical Therapy: The Case of Creighton University. *Journal of Physical Therapy Education*. 2003; Vol 17 (3): 44-51.

Resnik L, Jensen GM. Use of Clinical Outcomes to Explore the Theory of Expert Practice in Physical Therapy. *Physical Therapy*. 2003; 83: 10990-1106

Thomas S, Turner K, Jensen GM, Goulet C 'h 'u 'h ' ' 'Motivational Factors and Barriers to Pursuing a Transitional DPT Degree, *Journal of Physical Therapy Education*. 2003;17(2): 38-43.

Paschal K, Jensen GM, Mostrom E. Building Portfolios: A Means for Developing Habits of Reflective Practice.(invited paper) *Journal of Physical Therapy Education*. 2003;16(3): 38-53.

Jensen GM, Royeen CB. Improved Rural Access to Care: Dimensions of Best Practice. Invited paper. *Journal of Interprofessional Care*. 2002;6: 117-128.

Jensen GM, Royeen CB. Reflections on Building Community: Analysis of the Academic-Community Partnerships using the Integration Matrix. *Journal of Allied Health Professions*. 2001;30:168-175.

Noll E, Key A, Jensen GM. Clinical Reasoning of an Experienced Physical Therapist: Insights into Clinical Decision Making in Low Back Pain. *Physiotherapy Research International*. 2001;6(1):40-51.

Jensen GM, Paschal KA, Habits of Mind: Facilitating Student Transition Toward Virtuous Practice. Invited paper. *Journal of Physical Therapy Education*. Special issue on Moral and Ethical Development in Physical Therapy Education and Practice. *Journal of Physical Therapy Education*. 2000; 14(3): 42-47.

Jensen GM, Wharton MA. Guest editors, Gerinotes, Special issue on Ethics and Contemporary Practice. Section on Geriatrics, American Physical Therapy Association. *GeriNotes*: 2001; 8 (2), 2001

Jensen GM, Wharton MA. Reflections on Geriatric Practice: Collaboration, Context and the Moral Community. Guest editorial, *GeriNotes*, 2001;8(2):5,6.

Wharton MA, Jensen GM. Ethical Issues in Geriatric Physical Therapy Practice.*GeriNotes*. 2001;8 (2):11-16.

Cochran T, Jensen GM. Building Community with Native Americans: Balancing Wisdom and Vulnerability. *GeriNotes*. 2000;Vol 7 (6): 17-23.

Bradley-Popovich G, Frounfelter G, Abshire K, Crookston C, Jensen GM. Self-adapted Resistance Exercises for an Individual with Paraplegia. *Physical Therapy Case Reports*. 2000;3(3): 141-147,

Jensen GM, Gwyer J, Shepard KF, Hack LM. Expert Practice in Physical Therapy. *Physical Therapy*, 2000; 80 (1): 28-43.

Jensen GM (Guest Editor). Special Issue on Patient Education. *Journal of Physical Therapy Education*. 1999;13 (3).

Jensen GM, Givens D. Clinical Reasoning: Linking Theory to Practice and Practice to Theory. Invited paper special issue on clinical decision making, *Neurology Report*. 1999;23(4):137-144,

Shepard KF, Hack L, Gwyer J, Jensen GM. Describing Expert Practice in Physical Therapy.

Qualitative Health Research. 1999; 9 (6): 746-758.

Threlkeld J, Jensen G, Royeen CB. The Clinical Doctorate: An Analysis Framework for Physical Therapy. *Physical Therapy*. 1999;79: 567-581.

Deitweiler B, Baird D, Jensen GM, Threlkeld J. Doctorate of Physical Therapy: A Survey of Practicing Physical Therapists. *Journal of Physical Therapy Education*. 1999;13(1): 44-52.

Milidonis M, Godges J, Jensen G. Clinical Practice in Orthopedic Physical Therapy: A Descriptive and Theoretical Analysis. *J Ortho & Sports PT*. 1999; 29(4):240-247.

Hammel J, Royeen C, Bagatell N, Chandler S, Jensen G, Loveland J, Stone G, . Student Perspectives on Problem Based Learning in an Occupational Therapy Curriculum: A Qualitative Study. *American Journal of Occupational Therapy*, 1999; 53:199-206.

Coppard B, Jensen G, Custard C. Teaching Reflection: Integrating Clinical Reasoning with Narrative Cases. *OT Practice*. 1997;12:30-35

Tichenor CJ, Davidson J, Jensen G: Cases as Shared Inquiry: A Model for Reflection, invited paper, *Journal of Physical Therapy Education*, 1995;9 (2):57-62.

Schoensee S, Jensen G, Nicholson G, Gossman M, Katholi C: The Effect of Mobilization on Cervical Headaches. *J of Orth and Sports Phys Therapy*. 1995; 21(4):184-196.

Jensen G, Lorish C: Promoting Patient Cooperation with Exercise Programs: Linking Research, Theory and Practice. *Arthritis Care and Research*. 1994;7(4):181-189.

Serlin-Troxler J, Henoach B, Jensen G, Evans P: Therapists' Perception of the Role of Holism in Physical Therapy, *Physical Therapy Practice*. 1994;3(4):247-260.

Jensen G, Saylor C: Portfolios and Professional Development in the Health Professions *Evaluation and the Health Professions*; 1994;17(3):344-357.

Graly J, Yi S, Jensen G, Gibson M, Laborde T: Factors Influencing Return to Work for Clients in a Work Hardening Center. *Work: A Journal of Assessment, Prevention, and Rehabilitation*. 1994; 4(1):9-21.

Shepard K, Jensen G, Schmoll B, Hack L, Gwyer J: Alternative Approaches to Research in Physical Therapy: Positivism and Phenomenology, *Physical Therapy*, 1993;73:88-97.

Farrell J, Jensen G: Manual Therapy: A Critical Assessment of Role in the Profession, *Physical Therapy*, 1992; 72:843-854.

Jensen G, Shepard K, Gwyer J, Hack L: Attribute Dimensions which Distinguish Between Master and Novice Clinicians in Orthopedic Settings, *Physical Therapy*, 1992;72:711-722.

Gandy J, Jensen G: Group Work and Reflective Practicums in Physical Therapy Education: Models for Professional Behavior Development, *Journal of Physical Therapy Education* 1992; 6(1):6-10.

Raz P, Jensen G, Walter J, Drake M: Perspectives on Gender and Professional Issues Among Female Physical Therapists, *Physical Therapy*, 1991;71:530-540.

Jensen G, Denton B: Teaching Physical Therapy Students to Reflect: A Suggestion for Clinical Education. *Journal of Physical Therapy Education*, 1991;5(1)33-38.

Gale J, Brotherton F, Jensen G: Rehabilitation of Clients with Chronic Pain: Application of Behavioral Theory in a Multi disciplinary Setting. *Work: Journal of Prevention, Assessment and Rehabilitation*, 1991; 1(2):29-36.

Shepard K, Jensen G: Physical Therapy Curricula for the 1990's: Educating the Reflective Practitioner for Physical Therapy Practice, *Physical Therapy*, 1990;70:566-572.

Jensen G, Shepard K, Hack L: The Novice versus Experienced Clinician: Insights into the Work of the Physical Therapist, *Physical Therapy*, 1990; 70:314-323.

Jensen, G: Qualitative Methods in Physical Therapy Research: A Form of Disciplined Inquiry. *Physical Therapy*, 1989; 69:492-500.

Jensen, G: The Work of Accreditation On-Site Evaluators: Enhancing the Development of Profession, *Physical Therapy*, 1988; 68:1517-1525.

Einkauf, D, Gohdes, M, Jensen, G, and Jewell, M: Changes in Spinal Mobility with Increasing Age in Women, *Physical Therapy*, 1987;67:370-375.

Elton, K, McDonough, K, Savinar, E, Jensen, G: A Preliminary Investigation: History, Physical, and Isokinetic Exam Results versus Arthroscopic Diagnosis of Chondromalacia Patella, *Journal of Orthopaedic and Sports Physical Therapy*, 1985; 7:115-121.

Molumphy, M, Unger, B, Jensen, G, Lopopolo, R: The Incidence of Work-Related Low Back Pain in Physical Therapists, *Physical Therapy*, 1985; 65:482-486.

Bach, D, Green, D, Jensen, G, Savinar, E: A Comparison of Muscular Tightness to Low Back Pain in Runners, *Journal of Orthopaedic and Sports Physical Therapy*, 1985; 6:315-323.

Spence, S, Jensen, G, Shepard, K: A Comparison of Methods of Teaching Children Proper Lifting Techniques, *Physical Therapy*, 64: 1984;1055-1061.

Ponte, D, Jensen, G, Kent, B: A Preliminary Study: McKenzie Protocol vs Williams Protocol in the Treatment of Low Back Pain, *J Orth and Sports PT*, 1984;6:130-139.

Oshima, T, Green, T, Jensen, G, Lopopolo, R: The Effect of Varied Hip Angles on the Generation of Internal Tibial Torque in Normal Subjects, *Med Science in Sports and Exercise*, 1983;15:529-534.

Chamberlain, G, Jensen, G: Cyriax's Friction Massage: A Review, *Journal of Orthopaedic and Sports Physical Therapy*, 1092;4:16-24.

Jensen, G: Biomechanics of the Lumbar Intervertebral Disk: A Review, *Physical Therapy*, 1980; 60:765-773.

Jensen, G, Wilson, K: Horizontal Postrotatory Nystagmus Response in Females with Adolescent Idiopathic Scoliosis, *Physical Therapy*, 1979;59:1226-1233.

Invited Commentaries

Jensen GM. Invited Commentary on: Wottrich AW, Koch L, Tham K. The meaning of Rehabilitation in the home environment after acute stroke from the perspective of a multiprofessional team, *Physical Therapy*. 87: 788-791, 2007.

Jensen GM. Invited Commentary on: Smith K, Tichenor C, Schroeder M. Orthopedic k u o i g h *Journal of Orthopedic and Sports Physical Therapy*. 29(11): 652-654, 1999

Jensen G, Brown K: Invited Commentary, Article: Cover Bias in the Evaluation of h u o # h *Physical Therapy*.77:165,166,1997.

Jensen G: Invited Commentary, Article: Research and the Cumulation of Knowledge in Physical Therapy. *Physical Therapy*. 75(3):233,234, 1995

Guest Editor/Special Issues

Haddad A, Jensen GM.(Guest Editors). Special issue Scholarship of Teaching and Learning in Physical Therapy Education. 10 articles; co-authored physical therapy educators with Carnegie Scholars, *Journal of Physical Therapy Education*. 19 (3), 2005.

Jensen GM (Guest Editor). Special Issue on Patient Education. *Journal of Physical Therapy Education*. 13 (3), 3-56; 8 articles, special issue. 1999.

Farrell J, Jensen G: (Guest Editor) Manual Therapy; Special Issue. *Physical Therapy*, 72:1992

Books

Jensen GM, Nordstrom T, Hack L, Gwyer J, Mostrom E. *Excellence in Physical Therapist Education*. Slack Pub, (under contract)

Higgs J, Jensen GM, Christensen N, Loftus S.(eds) *Clinical Reasoning in the Health Professions*, 4th ed. Elsevier Pub, (under contract)

Jensen GM, Mostrom E. (eds). *Handbook of Teaching for Physical Therapists*. 3rd ed. (3rd edition, 2013; Elsevier Pub. (author/co-author 7 chapters out of 16 chapter text)

Higgs J, Sheehan D, Baldry Currens J, Letts W, Jensen GM (eds). *Realizing Exemplary Practice-based Education*. 2012 Rotterdam, Netherlands, Sense Pub.

Chapter Author:

Jensen GM, Purtilo R. Learning for Practice

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Christensen N, Black L, Jensen GM. Physiotherapy Clinical Placements and Learning to Reason.

Royeen C, Jensen G, Harvan R. (eds). *Leadership in Interprofessional Education, Research and Practice*. Jones and Bartlett Publishers, Boston, MA. 2009. (author/co-author: 5 chapters out of 27 chapter text)

Jensen G, Gwyer J, Hack L, Shepard K. *Expertise in Physical Therapy Practice: Applications for Professional Development and Life Learning*. 2nd ed. Elsevier; Saunders Publishing Company, 2007.

Purtilo R, Jensen G, Royeen C. (eds). *Educating for Moral Action: A Sourcebook in Health and Rehabilitation Ethics*. FA Davis Company, 2005; (received the Alpha Sigma Nu National Jesuit Book Award for the health sciences in 2006)

Shepard K, Jensen G (eds): *Handbook of Teaching for Physical Therapists*, 2nd ed; Butterworth-Heinemann Pub, Boston, MA, 2nd ed, 2002

Jensen G, Gwyer J, Hack L, Shepard K: *Expertise in Physical Therapy Practice*. Butterworth-Heinemann Publishers, 1999.

Shepard K, Jensen G (eds): *Handbook of Teaching for Physical Therapists*; Butterworth-Heinemann Pub, Boston, MA, 1997; (author/co-author 4 chapters)

Melvin J, Jensen G. (eds) Volume 1, *Evaluation and Management of Arthritis in Rehabilitation*. First volume in Rheumatologic Rehabilitation Series, 17 chapter text, American Occupational Therapy Association, Bethesda,MD, 1998

McKwen I (ed) *Writing Case Reports*: 2nd ed; American Physical Therapy Association, Dept of Publications, Jensen G; core contributor; American Physical Therapy Association, 2001

McKwen I (ed) *Writing Case Reports*: contributor, American Physical Therapy Association, Dept. of Publications, 1996. Jensen G; core contributor; author: 2 chapters; American Physical Therapy Association, 1996

Book Chapters

Jensen GM, Patton N. Developing Capability for Ethical Courage in Clinical Workplaces. *Developing Practice Capability: Transforming Workplace Learning Spaces*. Patton N, Higgs J, Trede F (eds). Sense Publishers (in press)

Jensen GM, Delany C. The Discourse on Ethics and Expertise in Professional Practice. *Professional Practice Marginalia*. Higgs J, Trede F (eds). Sense Publishers, 2016

Jensen GM, Royeen C. *Chapter on Education of Professionals: Professions-Health-related, International Encyclopedia of Education*. 3rd edition. Baker, McGraw, Peterson (eds). Elsevier, 2010

Goulet C, Doll J, Cochran T, Jensen G, Royeen C. Interprofessional Scholarship, Service and Education: A Sustainable Model for Scholarship of Engagement. In Harter L, Hamel-Lambert J, Millesen J (eds). *Participatory Partnerships: For Social Action and Research*. Kendall-Hunt Pub, Dubuque, IA, 2011

Jensen G, Resnik L, Haddad A. Expertise and Clinical Reasoning. Invited chapter. In Higgs J, Jones M, (eds). *Clinical Reasoning in the Health Professions*. 3rd edition, Elsevier Pub, 2008, pp. 123-136.

Jones M, Jensen G, Edwards I. Book Chapter- Clinical Reasoning in Physiotherapy, In: *Clinical Reasoning in the Health Professions*, Higgs J, Jones M (eds). 3rd ed. Elsevier Pub, 2008, pp. 245-256.

Gwyer J, Jensen G, Hack L, Shepard K. Book Chapter- Using a Multiple Case Study Research Design to Develop an Understanding of Expert Practice in Physical Therapy. In: *Evidence-Based Rehabilitation: Informing Practice through Qualitative Research*. Hammell K, Carpenter C (eds). Harcourt Health Pub, 2004, pp. 103-115

Jones M, Jensen G, Edwards I. Book Chapter- Clinical Reasoning in Physiotherapy, In: *Clinical Reasoning in the Health Professions*, Higgs J, Jones M (eds). 2nd ed. Butterworth-Heinemann Pub, pp 117-127, 2000

Jones M, Jensen G, Rothstein J. Book Chapter- Clinical Reasoning in Physiotherapy, In: *Clinical Reasoning in the Health Professions*, Higgs J, Jones M (eds). Butterworth-Heinemann Pub, pp. 72-87, 1995

Anderson M, Richards J, Stevens B, Jensen G: Musculoskeletal System: Cervical Complex, for Myers R (ed) *Saunders Manual for Physical Therapy Practice*. WB Saunders, pp 727-787, 1995

Jensen, G: Musculoskeletal Analysis:Introduction -Chapter 19 (pp326-339);Musculoskeletal Analysis: The Thoracic Spine -Chapter 26(pp 429-437); In Scully R, Barnes M,(eds) *Physical Therapy*, Scully R, Barnes M.JB Lippincott Pub. 1989.

Jensen, G: Fieldwork 2: Assessing Quality On-Site, Chapter 4 in *Assessing the Quality of Physical Therapy Educational Programs* by Tammivaara, J; Yarbrough, P; and Shepard, K; Department of Education, APTA, October,1986.

GRANT ACTIVITIES

Jensen GM, (PI) Gwyer J, Hack L, Mostrom E, Nordstrom T. (co-investigators). *Physical Therapist Education for the Twenty-First Century (PTE-21): Innovation and Excellence in Physical Therapist Academic and Clinical Education*. National study of excellence in physical therapist education patterned after Carnegie Foundation Study of Professions project, Funded by American Physical Therapy Association (APTA); 2 year grant;\$65,000; (2011-present); additional funding 2013: \$45,000

Jensen G, Coppard B, Cochran T, Ryan-Haddad,A (Co-investigators). *Circles of Learning: Community and Clinic as Interdisciplinary Classroom*. Quentin Burdick Rural Health Interdisciplinary Program. DDHS; HRSA; Grant #1 D36 HP 03158; Funded, 3 year project; 7/1/04-07; \$560,000

Royeen C(PI), Jensen G (Co-PI). *Dreamcatchers and the Common Good: Allied Health Leadership in Community Intergenerational Health*. Allied Health Project Grant; DHHS; HRSA Grant # D37 AH00634-01, Funded July 1, 2001; \$486,000; 7/1/01-04

Coppard B, Jensen GM, Keefner K, Malone P, Schwery L, Chapman T. *Creation of an Electronic Portfolio: A Multi-disciplinary Program Assessment Plan for Web-based Educational Programs in the Health Professions*, Funded # _____ y _____ Office of Institutional Research and Assessment, summer 2002, \$8,000

Jensen GM (PI), Royeen C, Monaghan M (Co-PIs). *Continuous Connection: Consortium for Rural, Intedisciplinary Training*. Quentin Burdick Rural Health Interdisciplinary Program. DDHS; HRSA Grant # 1 D36 AH 10082-01, Funded, \$454,000; 7/1/99-02

Royeen C(PI), Jensen G (Co-PI/Project Director). *Building Community:Collaboration among Occupational Therapists and Physical Therapists with Native Americans in Rural Nebraska*. Allied Health Special Project Grant; DHHS; HRSA Grant # D37 AH00634-01, Funded, \$417,155; 9/1/97-2000

Jensen G, Gandy J. *Knowledge and Clinical Teaching:Cases from Physical Therapy and Pharmacy*. Health Future Foundation, Creighton University, \$6,916, funded, July 1994

Shepard K(Principal Investigator)Jensen G, Gwyer J, Hack L (co-investigators)
The Development of Expert Performance in Physical Therapy Clinicians. The Foundation for
Physical Therapy Direct Annual costs: \$67,523 (funded; July 1,1993-95)

Brown K, Sirles A, Hilyer J, Jensen G (5% effort) (nursing;principal and co-
investigators) *Worksite Education/Exercise for Back Injury Prevention*, at University of
Alabama at Birmingham, Birmingham, Alabama; National Institute of Nursing
Research; \$428,000, funded 1994-96

Jensen G, (PI) Lorish C (mentor); *Assessment of Patient-Practitioner Views on Cooperation to
Treatment: Phase One of Testing Practitioner Use of Cooperation Enhancement Strategies -
Arthritis Health Professions New Investigator Grant*, November, (Funded: 7/1/89-6/30/91;
\$30,000)

Brown K, Sirles A (nursing; principal and co-principal investigators), Jensen
G(investigator;10%) *Injury Prevention Research Center - UAB Worksite Education/Exercise for
Back Injury Prevention* (seed grant request - \$4500; funded)

PROFESSIONAL ACTIVITIES

American Physical Therapy Association: (Member; 1976-present)

1993-present	Nebraska Chapter, APTA
1991-1993	California Chapter APTA, Golden Gate District
1988-1991	Alabama Chapter, APTA
1987	Pennsylvania Chapter, APTA, Southeastern District
1978-present	APTA Sections: Education, Orthopaedics, and Research; Health Policy Section 1998-present; Geriatric Section, 2008-present
1976-1986	California Chapter, APTA, San Jose District,

Other Professional Associations:

1983-present	American Educational Research Association (AERA), Member of Divisions: B- Curriculum Studies, J-Postsecondary Education, I-Education in the Professions
1996-present	American Society for Bioethics and Humanities, member
1995-2004	Kennedy Institute of Ethics, member
1990-present	Sigma Xi
1987-2006	Association of Rheumatology Health Professionals
1983-present	National Society for the Study of Education (NSSE)
1982-93	Society of Orthopaedic Medicine: Full member
1984-93	Society of Orthopaedic Medicine, Teaching Fellow
1999-2004	American Association for Higher Education (association discontinued- 2004)

NATIONAL ACTIVITIES

Editorial Board Activities:

2012-present	Editorial Board, Irish Physiotherapy Journal
2007-present	Editorial Board, Qualitative Health Research
1999-present	Deputy Editor, Physiotherapy Research International
2002-present	Associate Editor, Physiotherapy Theory and Practice
2003-present	International Advisory Board, Physiotherapy (Journal of the British Physiotherapy Association, appointed December 2003)
1998-1999	Associate Editor, Physiotherapy Research International
1993-99	Editorial Board Member, Journal of Physical Therapy Education Guest Editor, Special Issue on Patient Education, Fall 1999 Guest Editor, Special Issue on Scholarship of Teaching and Learning, Winter 2006
1992	Co-Guest editor, Physical Therapy, Special Issue on Manual Therapy
1990-1993	Book Review Editor, Journal of Physical Therapy Education
1990-1995	Editorial Board Member, Physical Therapy, Work: A Journal of Prevention, Assessment and Rehabilitation
1987-1994	Editorial Board Member, PHYSICAL THERAPY
July 1987	Panel Reviewer for Special Issue (Physical Therapy) on Clinical Decision Making

Manuscript Reviewer :

1999-present	Journal of Orthopedics and Sports Physical Therapy
1998-present	Physiotherapy Research International
1993-present	Journal of Physical Therapy Education
1993-present	Qualitative Health Research
1991-2003	Arthritis Care and Research
1985-present	Physical Therapy
2001-present	Physiotherapy Theory and Practice
2001-present	Journal of Allied Health
2005-present	Journal of Interprofessional Care

ACCREDITATION

CAPTE:

1995-present	Commission on Accreditation in Physical Therapy Education (CAPTE), Team Leader
1992-present	Reader Consultant for developing educational programs
1989	Project Board Member, APTA, Department of Accreditation, Grant on Aging
1985-present	Commission on Accreditation in Physical Therapy Education (CAPTE), On-site Reviewer

Institutional Accreditation

Higher Learning Commission/NCA:

2012-present	Member, Institutional Actions Committee
2009-present	Team leader
2007-2011	Readers Panel/Review Committee,

2003-present Consultant Evaluator, Higher Learning Commission/North Central Accreditation

American Physical Therapy Association:

Section Activities:

1989-1993 Section on Research, Secretary, member, Strategic Planning
2004-2007 Awards committee
2001-2010 Co-chair, Qualitative Research Special Interest Group
1990-1993 Section for Education, Nominating committee
1991-92 Abstract review committee
1997-2001 Secretary, 1997-2001

APTA Committees/Task Force/Consultant groups:

2013-present Catherine Worthingham Fellows Awards Review Committee
2011-12 Invited member, Task Force, Developing Mentorship Manual for Clinical Residency and Fellowship Education, APTA
2009 Invited member, Vitalizing Research through Practice and Practice through Research, Philadelphia, December 2-4, 2009
2008-09 Task Force, Revise APTA Code of Ethics
August 2005 Member consultant, APTA, Strategic Planning for Education, Alexandria, VA
May 2003 Member consultant, APTA, Coalition Consensus: Planning an Educational Research Agenda, Alexandria, VA
June 2002 Member consultant, APTA, Coalitions Consensus: A Shared Vision for Professionalism in a Doctoring Profession. Arlington, VA
June 2001 Member consultant, APTA, Coalition for Consensus for Transitional DPT Programs Curricular Guide, Alexandria, VA
January 2001 Member consultant, APTA, Coalition for Transitional DPT Programs- Core Competencies Alexandria, VA
1995-1996 Task force group that developed, Manual for Case Reports
April 1994 Member consultant, APTA Coalitions for Consensus; conference-for normative model for PT education, Alexandria, VA.
1997-1998 Chair, Advisory Panel on Research
1994-1998 Advisory Panel on Research
1989-1993 Committee on Screening Abstracts

NATIONAL ACTIVITIES/OTHER PROFESSIONAL ORGANIZATIONS

2013-present Member, Board of Directors, American Interprofessional Health Collaborative
2012 Member, AOTA working committee, Education and Professional Identity for Occupational Therapists
1994-1999 American Educational Research Association (AERA), Division I
Abstract reviewer for Annual meeting; 2008
1994-1995 Association of Rheumatology Health Professionals (ARHP), Chair, Membership committee, member of Governing Board, member of

1991-1997	Program committee
2004-2006	Abstract review committee
2005-2009	American College of Rheumatology/ARHP, Committee on Ethics and Conflicts of Interest
2005-present	Department of Health and Human Services, Federal Advisory Committee on Community Based Linkages. Health Resources Services Administration, Appointed by Secretary Leavitt, June 2005.
2006	Higher Learning Commission/ North Central Association of Schools and Colleges, Appointed as an Assessment mentor for the Commission Institutes on Assessment of Student Learning
2006	American Education Research Association; Task Force; Proposal Development for Research Handbook for Division I: Education in the Professions

STATE/LOCAL ACTIVITIES

1997-present	Chair, APTA Nebraska Chapter, Ethics Committee,
1996	Member APTA Nebraska Chapter, Ethics Committee
1992-1993	Research Special Interest Group, APTA California Chapter (Chair, program committee)
1989-1991	Chair, Research Committee, APTA Alabama Chapter
1986	Delegate, APTA House of Delegates, Chicago
1983-1986	Delegate, California Chapter APTA Assembly of Representatives
1981-1984	Treasurer, San Jose District, APTA

UNIVERSITY SERVICE

Creighton University

Department of Physical Therapy

2000-2001	Member, Ad-hoc committee for Clinical Residency Education
2000-2006	Member, Program Assessment Committee
2002-2004	Member, Admissions Committee
1999-2001	Member, Curriculum committee, (co-chair, 99-01)
1999-2001	Member, Task force for accreditation self-study
1998-2002	Chair, Steering Committee for transitional DPT program
1993-1996	Chair, Curriculum Committee
1993-1995	Member, Admissions committee
1993-1994	Awards committee

Department of Occupational Therapy

2000-2002	Member, Steering committee for distance education OTD
1997-1998	Member, Admissions Committee
1996-1997	Chair, Admissions Committee
1996-1999	Member, OTD Curriculum Committee

School of Pharmacy and Health Professions

2004-2005	Member, Pharmacy self-study committee
2004-2006	Member, Strategic Planning Committee
2002-2006	Chair, School Assessment Committee

2002-2006	Chair, School Faculty Development Committee
2002-2006	Member, Assessment committees (OT, PT, Pharmacy)
2001-2006	Member, Administrative committee
2002-2006	Member, Executive Committee
2003-2006	Research Advisory Committee
2002-2004	Member, Alegent Health/Creighton University Academic Affiliation Council
1998-2002	Member, Rank and Tenure Committee
1996-1997	Member, Task force for revising policy on Scholastic Standing
1996-1997	Member, Health Care Administration Planning Committee
1994-99	Chair, Program Evaluation Committee
1999-2002	Member, Program Assessment Committee
1993-1994	Member, Faculty and Staff development Committee
1993-1994	Member, Student Assistance Network Committee
1993	Member, Task force for Alumni Open House

Institution/University Committees/Creighton

2014-present	Co-Chair, Task force for HLC institutional accreditation
2013	Chair, Search Committee, School of Medicine Dean Search
2012-present	Co-vice chair, University Strategic Planning Committee
2009-2010	Co-chair, President appointed task force on Graduate and Adult Education
2006-present	Member (ex-officio), University Tenure and Promotion committee
2006-present	Chair, Graduate Board
2007-08	Chair, President appointed Graduate Education Task Force
2007-present	Co-Chair, University Research Advisory Committee
2006-present	Member, h Council
2004-2005	Member, Search Committee, Director Center for Health Policy Ethics
2003-2005	Member, Health Future Foundation grant review committee
2002-2006	Member, Advisory Board, Cardoner Project/Lily Foundation grant
2003	Member, Search committee for Assistant Vice President position for Office of Excellence in Teaching, Learning and Assessment
2003-present	Member, University Assessment Committee
2003	Chair, Ad-hoc Interdisciplinary OT/PT Curriculum committee
2002	Member, University Rank and Tenure committee (elected, unable to serve with move to Associate Dean position in SPAHP)
2001-2002	Member, Academic Council
2000-2002	Member, Task force for planning teaching and learning center
1999-2002	Member, Faculty Task Force on Assessment
1998-1999	Member, Long range strategic planning committee: Interdisciplinary Programs
1994-1996	Member, Steering Committee for North Central Accreditation Self-Study

Samuel Merritt College

Department of Physical Therapy

1991-1992	Chair, Accreditation Self-Study Steering Committee
<i>Institution</i>	
1992-1993	Member, Task force for Sabbatical leave
1992	Member, Search Committee for Academic Dean
1991-1993	Member, Curriculum Committee
1991-1993	Member, Faculty Rank and Promotion Committee
1991-1993	Member, Task force for Graduate MSN Program
1991-1992	Member, Strategic Planning Committee

University of Alabama at Birmingham

Division of Physical Therapy

1990-1991	Curriculum Committee
1990-1991	Chair, Accreditation Self-Study Steering Committee
1989-1990	Co-Chair, Curriculum Committee
1989-1991	Member, Admissions Committee
1988-1991	Member, Graduate Council - Graduate School
1988	Chair, Curriculum Evaluation Committee (new curriculum)

Temple University

Department of Physical Therapy

1987	Chair, Curriculum Committee for the Master's of Physical Therapy program
1987	Tenure and Promotion Committee
<i>College of Allied Health Professions</i>	
1987	Research and Study Leaves Committee
1987	Graduate Council
1987	University Disciplinary Committee

Stanford University

Division of Physical Therapy

1982-1984	Undergraduate advisor, pre-physical therapy students
1982-1983	Chairperson, Alumni Association Task Force
1982-1983	Curriculum Committee
1981-1982	Faculty Practice Plan Committee
1980-1982	Admissions Committee

CONSULTANT/GRANT REVIEWER ACTIVITIES

2009-2012	Advisory Board, PTA program, Southeast Nebraska Community College
November 2008	Peer grant review panel member, Department of Veterans Affairs, Office of Research and Development, Research on Educational Interventions for Health Professionals
September 2008-present	U k # \ ‡ 7
September 2005-2008	° " U o U # 'EdD Program development

March 2005- 2008	Advisory Committee on Interdisciplinary, Community-Based Linkages, US Dept of Health and Human Services, Health Resources and Services Administration, Appointed by Secretary of Health
August 2005	Invited consultant member, American Physical Therapy Association Education Strategic Planning Meeting, Alexandria, VA.
May 2005	Peer grant review panel member, Bureau of Health Professions, Division of Public Health and Community Health, Geriatric Education Center Reviews; Health Resources and Services Administration, Bethesda, MD
October 2004	Consultant, Massachusetts General Hospital, Rehabilitation Department
June 2002	Curriculum/program consultant, Department of Physical Therapy, The Ohio State University, Columbus, OH
April, 2002	Peer grant review panel member, Bureau of Health Professions, Division of Public Health and Allied Health, Health Resources and Services Administration, Rockville, MD, April 2002
April, 2001	Peer grant review panel member, Bureau of Health Professions, Division of Public Health and Allied Health, Health Resources and Services Administration, Rockville, MD, April 2001
1999-2001	Consultant, Physical therapy, Butterworth-Heinemann Publishers.
2000-01	Invited curriculum consultant, Combined Task Force for the APTA Orthopedic Section and American Academy of Orthopedic Manual Therapists, development of a model curriculum for clinical residency education
July 21-23, 2000	Invited Expert Consultant, DHHS, Health Resources and Services Administration grant, National Conference for Chiropractic Research Workshop V, qualitative research methods. Chicago, IL.
January 1998	Invited peer reviewer, National Board of Medical Examiners Medical Education Research Fund grants program.
June 18-20, 1998	Invited member of Planning Committee, DHHS, HRSA, National Conference for Research Agenda III.
June 19-22, 1997	Invited Expert Consultant, DHHS, Health Resources and Services Administration grant, National Conference to Establish the Chiropractic Research Agenda, member of educational research panel; Washington, DC, Workshop II.
July 1996	Invited Expert Consultant, DHHS, Health Resources and Services Administration grant, National Conference to Establish the Chiropractic Research Agenda, member of educational research panel; Washington, DC; Workshop I.
July 1994 - 97	Physical Therapy Clinical Consultant; Winnebago Public Health Service/Indian Health Service Hospital; Winnebago, Nebraska; Creighton University; Department of Physical Therapy PT Service and Educational Agreement; 2 days per month.
July 1993	Curriculum consultation, Department of Physical Therapy; University of Kansas, Kansas City, MO.
May-August 1993	Consultant; American Academy of Orthopedic Manual Physical Therapists; review of educational materials.

May 17-20, 1993	Consultant; Course in Qualitative Research Methods; taught by K Shepard, PhD; offered by Legitimerade Sjukgymnasters Riksforbund for Physical Therapy Faculty; Stockholm, Sweden.
November 1992	Consortium member, California Consortium for Clinical Education (CCCER) for Rancho-APTA Clinical Education Research Grant.
June, November 1992	Curriculum consultation, Department of Physical Therapy; Creighton University, Omaha, Nebraska.
1985 - present	Visiting Lecturer/Academic Faculty, Orthopaedic Physical Therapy and Clinical Residency Program, Kaiser-Permanente Hayward, CA; Research Foundations Course.
1988, 1989, 1990	Clinical Consultant/Clinical practice: Birmingham, AL: Montclair Orthopaedic, Physical Therapy, Summer, 1988, 1990; UAB Sports Institute, spring, summer 1989; UAB Pain Treatment Center, summer 1989.
1984-1986	Blue Cross of California, design of musculoskeletal promotional materials, Healthsteps Program.
1984-1986	Stanford Arthritis Center, Arthritis Success Manual, NIH grant #AM 20610.
1985	Stanford University Hospital, design of Back School
1981	Chair, Comm on Clinical Education, DeAnza College Physical Therapist Assistant Program.

INVITED LECTURES

Commencement address, Jensen GM. *We Believe in You*. Emory University, May 9, 2016. Atlanta, GA

Jensen GM. *Reflection: Taking a Deeper Dive*. Plenary Speaker. Rutgers University Health Science Symposium. Newark, NJ, March 18, 2015

Jensen GM. *Charting Your Professional Journey*. University of Incarnate Word, San Antonio, TX, September 2013.

Jensen GM. *Your road to mindful practice*. University of South Florida, School of Rehabilitation Sciences. Professionalism ceremony. Tampa, FL, October 2012.

Jensen GM, Furze J. *Clinical Reasoning in Entry-Level Pediatric Education*. APTA Pediatric Summit, July 19, 2012, Alexandria, VA

Jensen GM. *Who will you become? The Professional Formation of a UVM Physical Therapist*. University of Vermont, Department of Rehabilitation Sciences. Burlington, VT, October 2011.

Jensen GM. *Shaping the Life of the Mind for Practice: Cultivating Reasoning and Reflection*. Rehabilitation Grand Rounds. Emory University Medical Center, Atlanta, GA, July 2010.

Jensen G, Greenfield B. *The Role of Narratives in Clinical Practice: Clinical Narratives as a Tool for Exploring and Fostering Professional Development and Critical Reflection*. Emory University, Department of Rehabilitation Sciences, Atlanta, GA, July 2010

Jensen GM. *Shaping the Life of the Mind for Practice: Exploring the Role of Reasoning and Reflection*. Strulowitz Research Colloquium. Department of Rehabilitation and Movement Sciences. University of Medicine and Dentistry of New Jersey. Newark, NJ. September 2010.

Jensen G. *Challenges and Opportunities in Developing Professionalism with DPT Students*. University of Colorado Health Sciences, Department of Physical Therapy. October 2010.

Jensen G. *Learning to Practice*. University of Colorado Health Sciences, Anschutz Medical Campus, Academy of Medical Educators. October 2010.

Jensen G. *The Professional Formation of a Physical Therapist: Insights into your CMU Journey*; Central Michigan University, Mt. Pleasant, MI, September 8, 2009

Jensen G: *Exploration of Practical Reasoning: Third Millennium Strategies for Bridging the Liberal Arts with the Professions*. y # h u o h o Conference. February 27, 2009.

Jensen G: *Becoming an Academician: Strategies, Tools and Lifelines*. Widener University, Scholarship of Teaching and Learning Conference. March 21, 2009.

Jensen G. *Expertise and Novice Development: Making Connections*. Invited Research Day speaker, Cleveland State University, Cleveland, OH. October 2007

Jensen G: *Challenges Facing Physical Therapy: Emerging and Maturing as a Profession*. Invited speaker. Cleveland State University, October 2007.

Jensen G. *Expertise and Physical Therapy Practice*: Invited speaker. University of Wisconsin Clinics and Hospitals. Madison, WI. October 2007

Jensen G. *Professional Competence and Expertise: What is the Relationship*. Grimsby Competence Forum. San Diego, CA. August 2007

Keynote Presentation, Qualitative Health Research Conference: Human Understanding and Science, O # \ j k June 20-23, 2007, Seoul, Korea

Commencement address, *Your Professional Journey: Visions of the Possible* University of Arizona School of Health Sciences. AT Still University, Phoenix, AZ, March 11, 2007

Keynote speaker, American Board of Physical Therapy Clinical Specialists. American Physical Therapy Association, Section on Research. *Unveiling Excellence in Clinical Practice: The Many Faces of Expertise*. Combined Sections Meeting, Boston, MA, February 14, 2007

Invited Speaker, *Developing and Implementing an Educational Research Agenda: Lessons Learned*. Health Professions Educational Research Symposium, Nova Southeastern University, Ft. Lauderdale, FL, January 13, 2007

Invited speaker, Research Day, *Expertise in Physical Therapy Practice*, Chapman College, Pittsburgh, PA, May 2006

Programmatic Assessment: Strategies for Going the Distance. Invited speaker. Virtual Frontier:

Developing and Delivering Health Science Education from a Distance. Creighton University, Omaha, NE. June 21, 2005

Twenty third Eugene Michels Research Forum. American Physical Therapy Association, Section on Research. *Research Strategies for Exploring Expertise*; Combined Sections Meeting, New Orleans, February 2005

Theory, Practice and the Development of Expertise: Insights into the MGH Experience, Massachusetts General Hospital Rehabilitation Grand Rounds, Boston, MA, October 7, 2004

The Wisdom of Practice: The Critical Role of Reflective Thought. Massachusetts General Hospital Interdisciplinary Grand Rounds, Boston, MA, October 8, 2004.

Mindfulness in Physical Therapy Practice. American Physical Therapy Association National Clinical Education Conference, St. Louis, MO, October 10, 2004

Commencement address, Department of Physical Therapy and Human Movement Science, Northwestern University, Chicago, Illinois, December 6, 2003

2003 Distinguished Lecture for the Department of Physical Therapy, St. Louis University. *Development of Clinical Reasoning Expertise: Implications for Education and Practice*, Edward and Margaret Doisy School of Allied Health Professions, St. Louis University. April 3, 2003

Scanning the Landscape: The Future of Qualitative Research in Physical Therapy. Invited Speaker. Symposium session on qualitative research. World Confederation of Physical Therapy. Barcelona, Spain, June 10, 2003

Academic-Community Partnerships: Key Elements of Best Practice. Invited speaker. Diversity Conference: Research Agenda Conference VIII, Association of Chiropractic Colleges, sponsored by HRSA, Bureau of Health Professions/HRSA, New Orleans, LA, March 13, 2003.

15th Annual Development of the Expertise -to Guide. Creighton University, Omaha, NE, March 8,9 2002

Professional development seminar. University of East London, Department of rehabilitation sciences. *Expert practice, qualitative research and clinical doctoral education*, London, England, August 24, 2000

Show me the Evidence: Reflections on Inquiry, Knowledge and Practice. Minneapolis, MN, May 5, 2000.

Annual Research Lecture, Northwestern University, Department of Physical Therapy. *Expertise in Physical Therapy Practice*, Chicago, IL, October 27, 1999

Annual Green Research Lecture. Springfield College, *Expertise in Physical Therapy Practice: What, why and so what?* Springfield, MA, March 8, 1999

Invited Scholar, *State of the Art in Patient Adherence and Low Back Pain*, Los Angeles College of Chiropractic, 10th Annual Interdisciplinary Symposium on the Lumbar Spine, October 10-11, 1998, Los Angeles, CA

Ethics 2000: Demands for Reflective Practice. (Invited plenary speaker). Kansas State American Physical Therapy Association Meeting. Lawrence, KS, November 2, 1996,

Invited speaker; *Meet the Expert Session: Qualitative Research Methods.* National meeting for Association of Rheumatology Health Professionals. San Francisco, CA, October 24, 1995

Invited speaker: *Moving PT/PTA Students Toward Professional Competency; 2) Reflection as a Clinical Teaching Tool; 3) Expertise and the Master Clinician: Insights from Research;* Alabama PT Conf; Point Clear, AL, Jan 21-23, 1994;

The Scientific Paradigm and Qualitative Research, invited speaker, Arthritis Health Professions Association National Meeting, Boston, MA, November 20, 1991

PROFESSIONAL PRESENTATIONS

Kirkpatrick D, Kohn P, Kohn P, Kohn P. *Workplace Learning: Blurring Classroom and Practice Boundaries,* American Educational Research Association, Chicago, IL April 2015,

Jensen GM, Gwyer J, Hack L, Nordstrom T, Mostrom E. *National Study of Excellence in Physical Therapist Education: Emerging Findings,* APTA Combined Sections Meeting, Indianapolis, IN, February 2015

Greenfield B, Jensen G, Blanton, S, Swisher L, Carey J. *Humanities in Physical Therapy: Are We Ready?* APTA Combined Sections Meeting, Indianapolis, IN, February 2015

Furze J, Jensen G, Christensen N, Rapport M, Briggs M. *Domains of Professional Competence: Looking Across the Educational Continuum,* APTA Combined Sections Meeting, Indianapolis, IN, February 2015

Hack L, Gwyer J, Mostrom E, Jensen G, Nordstrom T. *Promoting Excellence in Clinical Education: Preliminary Findings from the Physical Therapist Education for the 21st Century Study.* APTA Educational Leadership Conference, Kansas City, KS, October 11, 2014.

Kirkpatrick D, Kohn P, Kohn P, Kohn P. *Moving the Strategic Plan beyond the Shelf and Into Action.* Higher Learning Commission Annual Meeting, Chicago, IL, April 14, 2014

Tichenor C, Jensen G, Matsui I, Hartley G: *Mentoring the Clinician Beyond Entry-Level: Skills, Knowledge and Behaviors for Successful Residency and Fellowship Mentoring* APTA Combined Sections Meeting, Las Vegas, NV, February 2014

Swisher L, Edwards I, Gessell G, Jensen GM. *Linking Clinical and Ethical Reasoning in Physical Therapy Education: Preparing Students for the Certainty and Uncertainty of Practice,* APTA Combined Sections Meeting, Las Vegas, NV, February 2014

Greenfield B, Jensen G, Jampel A., Knab M. *Clinical Narratives as a Tool for Exploring and Fostering Professional Development and Critical Reflection- workshop,* APTA Combined Sections Meeting, Las Vegas, NV, February 2014

Christensen N, Black L, Jensen G. *Clinical Reasoning: Making the Invisible Visible*. APTA Combined Sections Meeting, San Diego,CA, January 2013

Tichenor C, Jensen G, Matsui I, Hartley G: *Mentoring the Clinician Beyond Entry-Level: Skills, Knowledge and Behaviors for Successful Residency and Fellowship Mentoring* APTA Combined Sections Meeting; San Diego,CA, January 2013

Chapman T, Jensen GM, Danielson MA. Building Organizational Capacity for Distance Education: Conducting a Gap Analysis. Higher Learning Commission Annual Meeting, Chicago, IL, April 6, 2013.

Jensen GM. Expertise in Physical Therapy Practice: Implications for Professional Development, Distinguished Lecturer Series, University of Las Vegas Nevada, Department of Physical Therapy, Las Vegas, NV, June 9, 2013.

Furze J, Jensen G. Clinical Reasoning in Pediatrics Part 1: Laying the Foundation for Facilitating Reasoning Abilities in Students. Section on Pediatrics Annual Conference, Anaheim, California, November 8, 2013.

Furze J, Jensen G. Clinical Reasoning in Pediatrics Part 2: Strategies and Tools for Assessing Student Learning in Entry-Level Education. Section on Pediatrics Annual Conference, Anaheim, California, November 8, 2013.

Tichenor C, Jensen G, Matsui I, Hartley G: *Mentoring the Clinician Beyond Entry-Level: Skills, Knowledge and Behaviors for Successful Residency and Fellowship Mentoring* APTA Combined Sections Meeting; Chicago, IL, February 2012

Greenfield B, Jensen G. *Capturing Practical Knowledge in Clinical Practice through Narrative Inquiry: Clinical Narratives as a Tool for Exploring and Fostering Professional Development and Critical Reflection*, APTA Combined Sections Meeting; Chicago, IL, February 2012

Furze J, Nelson K, Jensen G *Clinical Reasoning in Pediatrics: Tools for Entry- Level and Residency Education*. APTA Combined Sections Meeting; Chicago, IL, February 2012

Jensen GM. Forty *Second Mary McMillan Lecture. Learning What Matters Most*. American Physical Therapy Association Annual Meeting, National Harbor, MD, June 11, 2011.

Jensen GM. *Interprofessional Education: Ethics, Policy and Care*. In *Interprofessional Education: All on Board*. Gandy J, Jensen GM, Brand B, Gilbert J, Schmidt M. American Physical Therapy Association Annual Meeting, National Harbor, MD, June 10, 2011.

Swisher L, Jensen GM Delany C, Adel Ahmad, Praestegaard J, Edwards I. Focused Symposium. *Forging Links to Moral Actions: Reaching Beyond Boundaries*. World Confederation of Physical Therapy. Jensen G *Ethical implications of social determinants*. Amsterdam, Netherlands. June 2011.

Sullivan M'K. *Healthy People 2020: Physical Therapist Roles in Health and Wellness across the Life Stages*. Multi-section Program. APTA Combined Sections Meeting; New Orleans, LA, February 2011.

Jensen GM, Mostrom E, Nordstrom T, Gwyer J, Hack L. *Advancing Physical Therapist Education: What can we Learn from the Carnegie Foundation Comparative Studies of the Professions*. APTA Combined Sections Meeting; New Orleans, LA February 2011.

Tichenor C, Jensen G, Matsui I, Ciolek C: *Mentoring the Clinician Beyond Entry-Level: Skills, Knowledge and Behaviors for Successful Residency and Fellowship Mentoring* APTA Combined Sections Meeting; New Orleans, LA February 2011.

Swisher L, Wharton M, Jensen G, Purtilo R, Nelson L, Davis C, Nalette E, Royeen C. *Teaching Ethics Education* . Combined Sections Meeting; San Diego, CA, February 2010.

Furze J, Black L, Barr J, Ekstrum J, Laubscher K, Jensen G. *Beyond our Box: A Clinical Reasoning Progression Tools for Entry-level, Clinical and Residency Education*. APTA Combined Sections Meeting; San Diego, CA, February 2010.

Tichenor C, Jensen G, Matsui I, Ciolek C: *Mentoring the Clinician Beyond Entry-Level: Skills, Knowledge and Behaviors for Successful Residency and Fellowship Mentoring*; Jensen G: *Defining Mentoring within the Context of Professional Competence and Developing Expertise*. APTA Combined Sections Meeting; San Diego, CA, February 2010.

Mostrom E, Jensen G, Jampel A, Sullivan M, Knab M, Grove C, Greenfield B. *Capturing Practical Knowledge in Clinical Practice through Narrative Inquiry: Clinical Narratives as a Tool for Exploring and Fostering Professional Development and Critical Reflection*. APTA Combined Sections Meeting; San Diego, CA, February 2010.

Danielson M, Jensen G. *Building Organizational Capacity in Assessment: A Case Example*. Higher Learning Commission, Assessment Workshop, Lisle, IL, February 2010.

Jensen G, Huggett K, Haddad A., Sullivan W. Peck K. *Practical Reasoning and Faculty Formation: Bridging the Liberal Arts and the Sciences with the Professions*. American Educational Research Association Meeting, Denver, CO, April 2010.

Danielson M, Jensen G. *Building Organizational Capacity for Assessment: A Case Example*. 115th Annual Meeting Higher Learning Commission/NCA National Meeting, Chicago, April 2010.

) 'U 'K '8 '# 'u '\ U '# ''*From Silos to Seeds: Coordinating and Building Capacity for Online Learning*. 115th Annual Meeting Higher Learning Commission/NCA National Meeting, Chicago, April 2010.

Goulet C, Cochran T, Jensen G, Royeen C, Harvan R. *The Integrative and Interactive Relationships between IPE and Practice*. Collaborating Across Borders II. International Conference on Interprofessional Education. Nova Scotia, Canada. May 20, 2009.

Swisher L, Jensen G, Purtilo R, Nalette R. *Interprofessional Group Formation and Development: The Dreamcatchers Experience*. Collaborating Across Borders II. International Conference on Interprofessional Education. Nova Scotia, Canada. May 20, 2009.

Jensen G, Royeen C, Swisher L, Purtilo R, Nalette E. Working Together to Learn Together: A Model for Building a Collaborative Learning Community in Rehabilitation Ethics. Collaborating Across Borders II. International Conference on Interprofessional Education. Nova Scotia, Canada. May 21, 2009.

Jensen G: Creating and Effective Learning Environment. Scholarship of Teaching and Learning Conference. Widener University, Philadelphia, PA. March 21, 2009

Jensen G: Developing Clinical Expertise. Scholarship of Teaching and Learning Conference. Widener University, Philadelphia, PA. March 21, 2009

Furze J, Peck K, Black L, Cochran T, Jensen G: Student Formation to Professional Obligation: Applying Key # K 8 h h t f Self- Where is Physical Therapy?. APTA Combined Sections Meeting, Las Vegas, NV, February 2009

Tichenor C, Jensen G, Matsui I, Ciolek C: Mentoring the Clinician Beyond Entry-Level: Skills, Knowledge and Behaviors for Successful Residency and Fellowship Mentoring; Jensen G: Defining Mentoring within the Context of Professional Competence and Developing Expertise. APTA Combined Sections Meeting, Las Vegas, NV, February 2009.

Jensen G, Gwyer J, Mostrom E, Nordstrom T. Planning for a National Study of Physical Therapist Education: Connecting to the Carnegie Study of the Professions. APTA Educational Leadership Conference. Phoenix, AZ. October 2008

Jensen G. Assessing General Education Outcomes; and Evidence of Student Learning. Higher Learning Commission/NCA Making a Difference in Student Learning: Assessment as Core Strategy. October 22-24, 2008, Chicago, IL

Black L, Mostrom E, Hayward L, Jensen G: *A Multisite Investigation of the Learning and Professional Development of Promising Novice Physical Therapists*. APTA Combined Sections Meeting; *Role of Mixed Methods in Qualitative Research*; Nashville, TN, February 2008.

Mostrom E, Black L, Jensen G, Hayward L. The First Year of Practice: An Investigation of the Professional Development of Promising Young Novice Physical Therapists. APTA Combined Sections Meeting, Boston, MA February 2007

7 K" O# u K 8 = K7 o h # - Contribution to Authentic Curriculum. APTA Combined Sections Meeting, Boston, MA February 2007

Jensen G. Role of IDEA in Faculty Development and Teaching Effectiveness. Higher Learning Commission Annual Meeting. Chicago, IL. April 2007.

Goulet C, Cochran T, Jensen G, Voltz J. Core Values to the Forefront: Professional Formation and Social Responsibility: What and Why? APTA Annual Conference and Exposition. Denver, CO, June 2007

Cochran T, Jensen G, Goulet C. Interprofessional Education and the Common Good: Challenges and Opportunities for Promoting Social Justice in Physical Therapy Education. World Confederation for

Physical Therapy. Vancouver, BC, Canada, June 2007

Purtilo R, Jensen G, Swisher L, Mostrom E, Edwards I, Delany C. Educating for Moral Action: Creating a Global Dialogue Exploring Student Learning in the Teaching of Ethics. World Confederation for Physical Therapy. Vancouver, BC, Canada, June 2007

Jensen G, Hayes K, Plack M, Dunfee H, Woods M, Gandy J. Educational Research: The Road to Excellence Educational Research in Physical Therapy. 2007 APTA Educational Leadership Conference. Minneapolis, MN. October 2007.

Jensen G, Haddad A, Huggett K, Gabriel L, Chadwick S. *Affective Development and Student Learning: Uncovering the Evidence*. International Society for the Scholarship of Teaching and Learning, Washington, DC, November 7, 2006

Chapman T, Schwery L, Jensen G. *Evaluating and Documenting Teaching Effectiveness*. Professional and Organizational Development Organization. Portland, OR, October 24, 2006.

Lenz T, Keekner K, Jensen G, Schwery L. *Deliberative Curriculum in Pharmacy Education*. American Association of Pharmacy Education, San Diego, CA, July 11, 2006.

Cochran T, Jensen G, Van Leit B, Daniels Z, Cummings D, Voltz J. *Educating Health Professionals for the 21st Century*. National Rural Health Conference, Reno, NV, May 2006

Cochran T, Jensen G, Gale J, Voltz J, Ryan-Haddad A, Cross P. *Practice and Educational Innovation: Revision of Rehabilitation Role to Extend Services*. National Rural Health Conference, Reno, NV, May 2006

Cross P, Voltz J, Parker D, Jensen G, Cochran T, Coppard B, Ryan-Haddad A. *Defeating diabetes and transforming students into caring professionals*. Centers for Disease Control Diabetes and Obesity Conference, Denver, CO, May 2006

Morse J, Mostrom E, Jensen G. *Developing Clinical Practice Knowledge: Evidence and Theory through Qualitative Inquiry*. Symposium session. American Physical Therapy Association, Combined Sections Meeting, San Diego, CA, February 4, 2006.

Jensen GM, Hack L, Hayes K, Rogers M, Levangie P, Selleck M. *Research and Physical Therapy: Best Practice Strategies for Facilitating Research Productive Departments*. American Physical Therapy Association, Combined Sections Meeting, San Diego, CA, February 4, 2006.

Hughes M, Laubscher K, Jensen G. *The Role of Deconstructed Cases in Ethics Education: How do Students Learn?* American Physical Therapy Association, Combined Sections Meeting, San Diego, CA, February 3, 2006.

Royeen C, Jensen G, Purtilo R. *Preparing Practitioners for a Lifetime of Moral Action*. Assoc of Schools of Allied Health Profs Conference. Houston, TX, October 21, 2005

Royeen C, Jensen G, Harvan R. *Expanding Roles of Allied Health Practitioners through Innovative*

Leadership Training. Association of Schools of Allied Health Annual Conference. Houston, TX, October 22, 2005.

Purtilo R, Jensen G. *Practical Tools for Ethical Decision Making: Critical Strategies for Clinicians*, Nebraska Physical Therapy Association Meeting, Lincoln, NE, September 10, 2005

Jensen GM, Haddad A, Mostrom E, *Taking Learning Seriously: Tools for Implementing the Scholarship of Teaching and Learning in Physical Therapy*. Three hour education session, Annual Conference of the American Physical Association (APTA). Boston, MA, June 11, 2005.

Boyd S, Jensen G, Cochran T, Coppard B, Voltz J: # O h k @
Healthcare in Native American Communities. Poster presentation. American Association of Colleges of Pharmacy, Cincinnati, OH, July 2005.

Jensen GM, Tanner D. *Successes and Challenges: Developing Clinical Site in Medically Underserved Communities*. Invited roundtable. BHP/HRSA All Grantee Meeting, Washington, DC, June 2, 2005.

Jensen, G, Purtilo R, Swisher D, Hack L. *Catching the Dream: Preparing Clinicians for a Lifetime of Moral Action*. Symposium session, American Physical Therapy Association, Combined Sections Meeting, New Orleans, LA, February 26, 2005.

Jensen G, Cochran T, Voltz J, Coppard B, Boyd S. (presented by Voltz). *Organizational Ethics as a Framework for Teaching and Learning about Social Justice*. First International Congress of Qualitative Inquiry; Champagne, IL; May 2005

Cochran T, Jensen G, Coppard B, Boyd S, Voltz J. *Learning from Experience: Exploring meaning in complex communities using a case analysis model*. First International Congress of Qualitative Inquiry; Champagne, IL; May 2005

Jensen GM (symposium organizer), Monaghan M, Paschal K, Cochran T, Gandy J: *Defining and Assessing Professional Competence*, American Physical Therapy Association, Combined Sections Meeting, Nashville, TN, February 2004.

Jensen GM (symposium organizer), Monaghan M, Haddad A, Jones R, Wadelin J, McGaghie W. *Implementing Performance-Based Assessment in Pharmacy Education: A Model for Health Professions Education*. American Educational Research Association, San Diego, CA, April 2004.

Coppard B, Jensen G, Paschal K. *Program Assessment: Integrating Performance Assessment Across the Health Professions*. American Association of Higher Education, Denver, CO, June 2004.

Jensen GM, Coppard B, Chapman T, Schwery L. *Dusting off the Data: Reflections on Building a Culture of Assessment*, 2003 Assessment Institute, Indiana University-Purdue University Indianapolis, November 4, 2003.

Jensen GM, Cochran T: *Balancing the Art and Science of Physical Therapy Clinical Knowledge: Uncovering the clinical wisdom (evidence) embedded in practice*

Nebraska Physical Therapy Association State meeting, Lincoln, NE, September 20, 2003

Royeen CB, Jensen GM, Cochran T, Coppard B, Morlok M. *Who, What, and How: Lessons Learned in Developing Interprofessional Service and Scholarship*. American Society of Allied Health Professions, Toronto, Canada, October 2003

Jensen GM, Chapman T, Coppard B, Schwery L. *Classroom to Online Teacher, Professional and Organizational Development Network in Higher Education*, Denver, CO, October 9, 2003

Jensen, GM. *Developing and Managing Clinical Expertise in Physical Therapy Practice*, Invited presentation for Rehab Partners Methodist Health System, Omaha, NE, August 14, 2003

Jensen GM. *Scanning the Landscape: The Future of Qualitative Research in Physical Therapy. Invited Speaker*. Symposium session on qualitative research. World Confederation of Physical Therapy. Barcelona, Spain, June 10, 2003

Jensen G, Eaton L, Crofts D. *Exploration of Ethical Decision Making in Clinical Practice: Case Study Comparison of Novice and Experienced Physical Therapy Clinicians*. World Confederation for Physical Therapy, Barcelona, Spain, June 11, 2003

Goulet C, Jensen G, Schwery L, Stohs S. *Web-Based Clinical Doctoral Education for Practitioners: Reflections on Program Development and Implementation*. World Confederation for Physical Therapy, Barcelona, Spain, June 7, 2003

Cochran TM, Cross PS, Morlok M, Jensen GM, Royeen CM, Sandstrom RW (2003). *Generational partners: partnering with American Indian elders to meet wellness needs*. Platform presentation, World Confederation for Physical Therapy, Barcelona, Spain.

Stohs S, Jensen G, Goulet C, Sandstrom R. *Entry-level and Post-Professional Clinical Doctoral Programs in Physical Therapy (DPT): An Administrative Perspective*. World Confederation for Physical Therapy, Barcelona, Spain, June 6, 2003

Jensen G, (symposium organizer) Haddad A, Sullivan W, Mentkowski M. *Developing Mindful Professionals: A Cross Disciplinary Exploration*, American Educational Research Association, April 21, 2003, Chicago, IL ; Jensen GM: Exploration of Critical Self-reflection in the Teaching of Ethics: The case of Physical Therapy

Jensen GM: *Academic-Community Partnerships: Key Elements of Best Practice. Invited speaker. Workshop: Developing Faculty Cultural Competence*. Diversity Conference: Research Agenda Conference VIII, Association of Chiropractic Colleges, sponsored by HRSA, Bureau of Health Professions/HRSA, New Orleans, LA, March 13, 2003.

Jensen G, Haddad A, Purtilo R: *The Impact of Critical Self-Reflection on Student Professional Development: Applying a Model of Scholarship of Teaching and Learning* (symposium). American Physical Therapy Association, Combined Sections Meeting, Tampa, FL, February 14, 2003

Hack L, Gwyer J, Jensen G, Shepard K. *Developing and Managing Clinical Expertise in Physical Therapy Practice*; Invited multisection program, American Physical Therapy Association, Combined Sections Meeting, Tampa, FL, February 13, 2003

Jensen, Coppard, Paschal, Schwery, Kincaid, Cochran, Chapman (poster) *Scholarship of Assessment in Distance Education: A Program Portfolio*. American Physical Therapy Association, Combined Sections Meeting, Tampa, FL, February 13, 2003

Barr, Wagner, Miller, Jensen, Tichener. *Clinical Reasoning in Orthopedics: A Comparison of Therapists with and without Clinical Residency Training*. (platform Presentation) APTA, Combined Sections Meeting, Tampa, FL, February 15, 2003

Coppard B, Jensen G. *Scholarship of Assessment in Distance Education: Developing a Multi-Disciplinary Portfolio in the Health Professions*, 2002 Assessment Institute, Indiana University-Purdue University Indianapolis, November 4, 2002, Indianapolis, Indiana

Jensen GM, Chapman T. *Going the Distance: Using Technology to Enhance Teaching and Learning*. American Physical Therapy Association Annual Conference and Exposition, Invited educational session, Cincinnati, OH, June 6, 2002;

Cochran T, Jensen GM, Sandstrom R. *Empowering the Therapeutic Relationship: Qualitative Investigation of Health Beliefs in an American Indian Community*. American Physical Therapy Association Annual Conference and Exposition, Cincinnati, OH, June 7, 2002

Coppard B, Jensen G. *Scholarship of Assessment in Distance Education: Reflections on the Development of a Multi-Disciplinary Portfolio*. Scholarship of Teaching and Learning Conference, Rockhurst University, April 20, 2002.

Jensen GM, Royeen CB, Arndt J. *A Qualitative Approach to Best Practice in Interdisciplinary, Rural Health Care*. National Academies of Practice and Interdisciplinary Health Care Team Conference, Arlington, VA April 13, 2002

Royeen CB, Jensen GM. *Immersion in Culture: A Qualitative Approach to Best Practice in Interdisciplinary, Rural Health Care*. National Academies of Practice and Interdisciplinary Health Care Team Conference, Arlington, VA April 13, 2002

Jensen GM, Royeen CB. *Organizational Ethics as a Framework for Analysis of an Interdisciplinary, Academic-Community Partnership*, National Academies of Practice and Interdisciplinary Health Care Team Conference, Arlington, VA April 13, 2002

Haddad A, Jensen GM, Scritchfield S. *The impact of critical self-reflection on student professional development: Strategies for pedagogy, inquiry and action*. American Association of Higher Education Meeting: Learning in Context, Chicago, IL, March 18, 2002.

Hack L, Gwyer J, Jensen GM, Shepard K, Loppolo R. *Expert Practice in Physical Therapy*, invited preconference workshop for Administration Section, American Physical Therapy Association, Combined Sections Meeting, Boston, MA, February 20, 2002

Mostrom E, Shepard K, Cochran T, Treizenburg H, Jensen G. *Qualitative Research in Physical Therapy Education: Challenges and Opportunities*. American Physical Therapy Association, Combined Sections Meeting, Boston, MA, February 21, 2002

Boissonnault W, Tichenor CJ, Jensen G, Lyons K, Porter Hoke A. *Designing a Residency Curriculum in Orthopedics and Manual Therapy*. American Physical Therapy Association, Combined Sections Meeting, Boston, MA, February 24, 2002

Abeyta A, Frazier M, Owens A, Scott S, Jensen G. *Health Promotion and Wellness in Physical Therapy Curricula: A Descriptive Survey*. Poster presentation. American Physical Therapy Association, Combined Sections Meeting, Boston, MA, February 22, 2002

Pennsylvania Physical Therapy Association Annual Conference, October 26-27, 2001, Seven Springs, PA: Black J, Delitto A, Hack L, Jensen GM. Panel on the DPT and Transitional DPT; Jensen GM, Wharton MA. *Ethical Practice in a Managed Care Environment: Myth or Reality?*; Jensen GM, Wharton MA, Phipps S, Setley M, Vrooman K. Ethical Dilemmas in Physical Therapy: Reflective Case Analyses.

Jensen GM, Cochran TC, Royeen CB, Duncan M. *Insights into Student Experience in a Cross Cultural, Interdisciplinary Setting: Role of Qualitative Methods*. American Physical Therapy Association Annual Conf and Exposition, June 23, 2001, Anaheim, CA

Jensen GM, Lorish C, Morris D, Gahimer J, *Negotiating Common Ground: Facilitating Patient Adherence in Clinical Practice*. Invited joint program session, American Physical Therapy Association Combined Sections Meeting, February 15, 2001, San Antonio, TX

Jensen GM. *Meeting the Challenge of Culturally Diverse and Underserved Populations: Professional and Ethical Perspectives*. American Physical Therapy Association Combined Sections Meeting, February 16, 2001, San Antonio, TX

Jensen GM, *Discussant for Professional Socialization and Identity Formation in Physical Therapy Education and Practice* (Mostrom E, Stiller C Thompson K). American Physical Therapy Association Combined Sections Meeting, February 16, 2001, San Antonio, TX

Jensen GM, *Role of Qualitative Research in Evidence-based Practice*. Invited speaker; symposium presentation, with Drs. Ian Coulter and Ben Crabtree; at DHHS, Health Resources and Services Administration grant, National Conference for Chiropractic Research Workshop V, July 23, 2000, Chicago, IL.

Jensen GM Mostrom E, Paschal K, *Portfolio Assessment throughout your Professional Career: Student, Faculty and Practitioner*. Symposium session, APTA Annual Conference and Exposition. Indianapolis, IN, June 16, 2000

Jensen G, Hack L, Gwyer J, Shepard K, *Expert Practice in Physical Therapy*. Symposium session, APTA Annual Conf. and Exposition. Indianapolis, IN, June 15, 2000

Mostrom E, Stiller C, *Socialization and Identity Formation in Professional Education: Moving through Time and Space*. Symposium invited discussant(GJensen). American Educational Research Association, Division I. New Orleans, LA, April 24, 2000.

Jensen GM, Cochran T. *Cultivation of Interdisciplinary Cross-Cultural Partnerships with Native American Communities*. APTA, Combined Sections Meeting, February 5, 2000, New Orleans, LA

Jensen GM, Hayes K *Clinical Reasoning and Decision Making in Orthopedics*. APTA, Combined Sections Meeting, February 5, 2000, New Orleans, LA

Royeen C, Jensen G, Duncan M. Cochran T. *Synergistic Strategies: Promoting Academic-Community Partnerships and Cultural Competence Across Disciplines*. Poster presentation. DADPHP Cross Program Grantee Conference., Las Vegas, NV, June 27-30, 1999

Jensen G, Cochran T, Duncan M, Parlak B. *Community-Academic Partnerships: Application of the Integration Matrix*. APTA Scientific Meeting and Exposition, Washington, DC, June 4-7, 1999

Coppard B, Jensen G. *Problem-Based Learning: Reflections on Linking Theory, Pedagogy and Practice*. AOTA Scientific meeting, Indianapolis, IN, April 5, 1999

Jensen G, Royeen C, Galt K, Turner P, Cochran T, Duncan M. *Outcomes Research -- From Whose Perspective? Deconstructing Practice Outcomes Across Health Care Professions*. Symposium. Reconstruction of Outcomes Research. Advances in Qualitative Methods, Edmonton, Alberta, Canada, February 18-20, 1999

Jensen G, Threlkeld J, Paschal K, Stohs S, Adams A, Wolf F, Richardson J. *Clinical Doctorates in the Health Professions: A Critical Analysis* APTA, Combined Sections Meeting, February 6, 1999, Seattle, WA

Jensen GM. *Unmasking the Myths about Theory, Research and Practice*, Invited speaker, APTA Combined Sections Meeting, February 4, 1999, Seattle, WA

Tichenor CJ, Farrell J, Davies G, Long T, Rogers M, Jensen G. *Essential Components for Developing a Clinical Residency Program*, Invited speaker, APTA Combined Sections Meeting; February 5, 1999, Seattle, WA

Jensen G, Royeen C, Marti S. *Using Qualitative Methods and Reflection in Project Evaluation*. (poster) APTA Combined Sections Meeting; February 5, 1999, Seattle, WA

Royeen C, Jensen G, Duncan M. Cochran T. *Building Community: Interdisciplinary Training Grant Overview*, Leadership in Collaborative Practice Conference, US Dept of Hlth and Human Services, Health Resources and Services Administration, Las Vegas, NV, June 8-11, 1998

Jensen G, Linnell K. *An Ethic of Care: Implications for Clinical Decision Making*, theory presentation, APTA Scientific Meeting and Exposition, Orlando, FL, June 6, 1998

Jensen G, Sandstrom R, Royeen C, Blanchard S. *Building Community: Interdisciplinary Training among Physical and Occupational Therapists with Native Americans in Rural Nebraska*, Nebraska APTA State

Meeting, Lincoln, NE, March 21, 1998

Jensen G, Ramsden E, Davis C, Mostrom E, McClelland M, Shepard K, *Qualitative Research Methods* (invited day long session); APTA Combined Sections Meeting, Boston, MA, February 13, 1998

Jensen G, Purtilo R, Paschal K, Hruska R, Scott R. *Challenges in Professional Ethics*.(invited symposium). Scientific Meeting, American Physical Therapy Association , San Diego, CA, June 2, 1997

Lorish C, Jensen G. *Enhancing Patient Adherence: Process and Strategies for Practice..* Scientific Meeting, APTA , San Diego, CA, June 2, 1997

Coppard B, Jensen G. *Teaching Reflection: Integrating Clinical Reasoning with Narrative Cases*. American Occupational Therapy Association, Annual Meeting, April 2, 1997.

Milidonis M, Godges J, Jensen G. *Linking Theory with Practice: Nature of Clinical Practice Structures in Orthopedic Physical Therapy*.(Invited session). Combined Sections Meeting, APTA, Dallas, TX, February 10, 1997

Jensen G, Lorish C, Francis K, Sluijs E. *Enhancing the Health Status of Patients by Increasing Adherence to Therapeutic and Voluntary Exercise*. Invited symposium. APTA Scientific Meeting and Exposition. Minneapolis,MN, June 18, 1996

Gwyer J, Hack L, Jensen G, Shepard K. *Fires in the Field; Methodologic Issues in Qualitative Research*. Invited workshop. APTA Scientific Meeting. Minneapolis,MN, June 18, 1996

Jensen G, Paschal K, *Clinical Teaching in Physical Therapy:Cases from the Field*. Research presentation. APTA Scientific meeting. Minneapolis,MN, June 14, 1996

Jensen G, Paschal K, Tichenor C, Hickey K. *Physical Therapy for Health Action*. Invited presentation. (symposium). APTA Combined Sections meeting. Atlanta,GA, February 18, 1996

Hack L, Jensen G. *Cases, Case Method and Clinical Knowledge: Tools for Reflective Practice*. Pennsylvania Physical Therapy Association State Meeting, Seven Springs, PA, October 26, 1995.

Runyon C, Jensen G, Brown K. *Working Toward Consensus:Is the Clinical Doctorate a Societal or Professional Imperative?* California Occupational Therapy State meeting, San Jose, CA, October 15, 1995

Jensen G, Paschal K, *Program Evaluation as Reflective Inquiry*. World Confederation for Physical Therapy. Washington, DC, June 27, 1995.

Jensen G. *Representations of Knowledge in Clinical Practice:Expert Cases from Orthopedics*. World Confederation for Physical Therapy. Washington,DC, June 28, 1995.

Jensen G, *Effective Practice: Clinicians as Researchers: Making a Case for Cases*. Association of Rheumatology Health Professionals National Meeting, Minneapolis, MN,Oct 25, 1994

Shepard K, Jensen G. *Qualitative Research Methods, "Qualitative Research: Tools and Tales"*, invited presentation, Canadian Physiotherapy Association- APTA Joint Congress, Toronto, Canada, June 5, 1994

Jensen GM, *Physical Therapist as Pedagogue and Healer: A Case Study*; Qualitative Health Research Conference, Hershey,PA; June 12, 1994

Jensen GM, Mostrom E. *Exploring Expertise:Inquiry into Practitioner Wisdom and Mastery*; APTA/CPA Joint Congress, Toronto,Canada, June 4, 1994

Paintanida M, Harris I, Jensen G, Saylor C, Irby D. Smith A. Symposium: *Tapping Tacit Knowledge in Professions Education through Reflection and Discourse(Role of Portfolios)* American Educational Research Association, April 5, 1994

Jensen G. *Making Exercise Work: Strategies for Motivating Elders*, APTA, Combined Sections Meeting, New Orleans, LA ,February 5, 1994

Jensen G, Minor M. *Exercise in Arthritis Management:Application of the Biopsychosocial Approach in Clinical Practice*. APTA Annual Conference, June13,1993, Cincinnati,OH

Jensen GM. *Portfolios: A Tool for Assessment and Reflection in the Health Professions*. Department of Physiotherapy, College of Health and Caring Sciences, Uppsala University, May 18,1993; Uppsala, Sweden

Jensen G, Saylor C. *Portfolios and Professional Development in the Health Professions*, American Educational Research Association Annual Meeting, April 16,1993; Atlanta,GA

Craik R, DeLitto A, Jensen G. *Expectations for Research at Entry-Level*, APTA Combined Sections Meeting, San Antonio,TX, Feb.6, 1993

Jensen G. *Educating the Reflective Practitioner:Implications for Physical Therapy Students*; University of Illinois at Chicago;Department of Physical Therapy, November 18,1992

Jensen G. *Behavioral Diagnosis:What,How and Why*; APTA National Student Conclave;Philadelphia,PA;October 31,1992

Jensen G. *Master Clinician and the Development of Expertise:Insights from Research of the Orthopedic Clinician*, California Chapter Annual Conference, October 23,1992, Sacramento,CA

Jensen G, Lorish C. *Patient Perceptions of Factors that Affect Adherence with Home Exercise Programs:A Descriptive Study*, Arthritis Health Professions Scientific Meeting, October 14,1992, Atlanta,GA

Jensen G, Lorish C. *Physical Therapists' Approach to Home Exercise Programs:Identification of Routine Beliefs and Behaviors*;(Poster) APTA Annual Conference Denver,CO;June 17,1992

Jensen G, Shepard K, Lorish C. *A Model to Elicit Patient Adherence with Home Programs:Role of Behavioral Diagnosis*; APTA Annual Conference, Denver, CO;June 16,1992.

Gwyer J, Hack L, Jensen G, Shepard, K. *Asking Tough Questions: Explaining Human Behavior*, APTA Annual Conference, Denver, CO; June 15, 1992

Craik R, Krebs D, Jensen G. *Expectations for Research at Entry-Level*, APTA Combined Sections Meeting, San Francisco, CA, Feb. 7, 1992

Pinkston D, Jensen G. *Outcome Assessment: Strategies for Use in Physical Therapy Education*, APTA Combined Sections Meeting (CSM), San Francisco, CA, Feb 9, 1992

Jensen G, Richards J. *Musculoskeletal Evaluation: Integration of Clinical Skill and Cognitive Process Using the Maitland Concept*, (poster) APTA, CSM, San Francisco, CA, Feb 9, 1992

Jensen G, Lorish C. *Physical Therapists' Differences in the Use of Treatment Adherence Behavioral Strategies in Musculoskeletal Cases*, (poster). Arthritis Health Professions Association National Meeting, Boston, MA, Nov 18, 1991

Jensen G. *Assessment of Patient-Practitioner Views on Cooperation to Exercise*, Fellows Forum, Arthritis Health Professions Association national meeting, Seattle, WA, October 30, 1990

Jensen G. *Novice and Experienced Practitioners*, Conference - Clinical Decision Making: Key to Effective Clinical Education, University of Alabama, Birmingham, October 5, 1990

Jensen G. *Teaching: Preparing the Reflective Practitioner*, invited speaker, APTA - Department of Education, Promoting Excellence in Higher Education, Ft. Lauderdale, FL, July 29-31, 1990

Jensen G. *Accreditation in Physical Therapy: Perspectives on a Multidimensional Process*, APTA Annual Conference, Anaheim, CA, June 27, 1990

Jensen G. *A Challenge for Physical Therapy Educators: Translating Patient Needs into Curricular Emphasis*; Panel Presentation, Geriatric Project Board, Department of Accreditation, APTA Annual Conference, Anaheim, CA, June 27, 1990

Jensen G. *Case Study Research In Education*, invited presentation for Quantification in Clinical Practice, APTA Combined Sections Meeting, New Orleans, LA, February 1, 1990; *Suggestions for Clinical Researchers*, part of education and research forum: *Alternative Research Approaches in Clinical Practice*, APTA Annual Conference, Nashville, TN, June 12, 1989

Jensen G. *Evaluating Qualitative Research Presentations*, APTA Combined Sections Meeting, Honolulu, Hawaii, Feb. 3, 1989 (Before 1989 available on request)

Professional Workshops/Courses Conducted:

Introduction to the Scholarship of Teaching and Learning.; *Institutional Leadership Workshop for SoTL*, National Carnegie Academy for the Scholarship of Teaching and Learning Conference 2012. Ciccone A, Jensen G. June 2012, Loyola Marymount, Los Angeles, CA

Introduction to the Scholarship of Teaching and Learning. ; *Institutional Leadership Workshop for SoTL*. National Carnegie Academy for the Scholarship of Teaching and Learning Conference 2011. Ciccone A,

Jensen G. June 2011, Harper Center, Creighton University, Omaha, NE

Introduction to the Scholarship of Teaching and Learning. National Carnegie Academy for the Scholarship of Teaching and Learning Conference 2010. Ciccone A, Jensen G. June 2010, Harper Center, Creighton University, Omaha, NE

Introduction to the Scholarship of Teaching and Learning. National Carnegie Academy for the Scholarship of Teaching and Learning Conference 2009. Ciccone A, Jensen G. June 2, 2009, Harper Center, Creighton University, Omaha, NE

Introduction to the Scholarship of Teaching and Learning. National Carnegie Academy for the Scholarship of Teaching and Learning Conference 2008. Ciccone A, Jensen G. June 4, 2008, Gallup Institute, Omaha, NE

Jensen G, Royeen C. *Qualitative Research and Case Study Design: Application in Health Professions Education and Practice.* Invited workshop. Qualitative Health Research 2007: Human Understanding and Science. Seoul, South Korea, June 2007.

Leadership in Rural Health Care Conference: National Conference convened at University of Health Sciences at Colorado/ Area Health Education Center, working conference sponsored by HRSA grant #1 D36 HP 03158; 40 educators/leaders in rural health from occupational therapy, physical therapy, pharmacy, nursing and medicine. Conference organizers: Jensen G, Royeen C, Harvan R, September 9-13, 2006

Workshop/seminar presenter: *Collaboration and Team Building in Clinical Research.* Palmer Center for Chiropractic Research, NIH/K-30; Chiropractic Clinical Research Curriculum, Davenport, IA, ; July 22,23, 2004; July 15,16, 2005.

Leadership in Ethics Conference: National Conference convened at Creighton University Center for Ethics and Health Policy, working conference sponsored by HRSA grant #1 D37 HP 00824; 20 ethics educators in occupational therapy and physical therapy. Conference organizers: Purtilo R, Jensen G, Royeen C. September 11-13, 2003

Physical Therapist Assistants National Conclave, Invited workshop; *Making the Most of Patient Exercise Programs: Clinical Strategies for the PTA,* with Handler J, August 24, 2002, Charlotte, NC

Arcadia University; Summer semester 2002, Course in Education in Physical Therapy Practice, 2 semester hour course, with Handler J, June 22,23rd, Philadelphia, PA

Beaver College (Arcadia University); Fall semester 2000, Course in Education in Physical Therapy Practice, 2 semester hour course, taught online and workshop. October 2000.

Clinical Case Reports: A Workshop for Clinicians. (With Royeen C, Cochran T) Nebraska APTA Spring Conference. Omaha, NE, March 26, 1999

Negotiating Common Ground: Strategies for Enhancing Patient Adherence, workshop, Los Angeles College of Chiropractic Visiting Scholar program, October 10,11, 1998

Therapeutic Exercise for Physical Therapist Assistants. (with Givens D, Gale J). Nebraska State American Physical Therapy Association,,Lincoln, NE, August 23, 1997.

Ethics in Managed Care: Issues, Obligations, and Justice. (Workshop session). Kansas State American Physical Therapy Association, Lawrence,KS, November 2, 1996

Self-responsibility in Clinical Education. (With Paschal K), University of Evansville # - Workshop. Evansville, IN, March 15, 1996.

Education and the Physical Therapist: Tools for Clinical Practice. Department of Physical Therapy. Beaver College, Glenside,PA, November 11, 1995.

Self-k u o k # - ‡ Mhaschal. Pennsylvania Physical Therapy State meeting. Seven Springs,PA, October 27, 1995

Enhancing Patient Adherence to Treatment:A Systematic Approach. With C Lorish. National meeting for Association of Rheumatology Health Professionals. San Francisco,CA October 24, 1995.

The Use of Qualitative Research Methods to Expand our Understanding of Physical Therapy Practice and Outcomes. (With Shepard K, McCellend M, Mostrom E, Thomas-Edding D, Parry A).Pre-congress course. World Confederation for Physical Therapy. June 21-24, 1995

Cultivating Reflection in Clinical Education:Practical Strategies for Clinical Teachers; workshop (with Gandy J); for Detroit Area Clinical Educators Forum; September 30, 1994; Detroit, MI

Clinical Teaching:Strategies for Developing Reflective Practitioners; workshop (with Paschal K); for University of Colorado Physical Therapy Program and Clinical Educator's Forum; September 17, 1994; Denver, Colorado

Clinical Teaching:Strategies for Developing Reflective Practitioners; workshop for Clinical instructors, University of South Dakota, March 19,1994, Vermillion,SD

Preparing Reflective Practitioner;workshop with K Shepard; for Central Indiana Clinical Education Consortium, March 26,1994, Indianapolis,IN

Theoretical Foundations for Health Professionals; 32 hour graduate workshop; October 16,17; December 4,5, 1993; Samuel Merritt College, Oakland,California and October & December 1994.

Developing Reflective Practitioners:Implications and Strategies for Clinical Educators, (with K Shepard) workshop for Ohio Consortium of Physical Therapy Schools, Toledo,OH, September 18,1993

Group Facilitator, Project Focus "93:Conference on Work Related Injury, Foundation for Physical Therapy, August 28,29,1993, Alexandria,VA

Making Reflection a Reality:Strategies for Clinical Educators; workshop for 5th National Clinical Education Conference, Manhattan Beach, CA, April 23,1993

Cultivating Reflection in Clinical Education: Practical Strategies for Clinical Teachers (with Gandy J); workshop for Illinois Consortium for Clinical Education in Physical Therapy; Chicago, IL; March 25, 26, 1993

Faculty, Workshop -- Problem-Based Learning: A Paradigm Shift in Academic and Clinical Education, (with Johnson G, Binkley J;) APTA Combined Section Meeting, San Antonio, TX, February 3, 1993

Developing the Reflective Practitioner: Implications for Clinical Education in the Next Decade, (with Shepard K), Pennsylvania PT Association Annual Conference; Philadelphia, PA, October 29, 1992

Stories and Statistics: Choosing Research Designs in PT Practice, (with Shepard K, Hack L); Pennsylvania PT Association Annual Conference; Philadelphia, PA; October 1992

Introduction to Research Workshop (for entry-level students), (with Shepard K) University of Central Florida, Orlando, FL, September 24, 25, 1992

Moderator/Facilitator, APTA Regional Conference on Developing Agreement on Content of Postbaccalaureate Entry-level Curricula, University of Washington, Seattle, WA, August 6-9, 1992 and University of Texas-San Antonio, San Antonio, TX, September 10-13, 1992

The Reflective Practitioner: Implications and Applications for Physical Therapy Clinical Education; (with Shepard K); USC Symposium in Clinical Education, Los Angeles, CA; January 17, 1992

Teaching Associate, Postgraduate Course in Orthopedic Medicine, Part A, with Stephanie Saunders, MCSP and Associates, Toronto, Canada, March 3-6, 1991

Teaching Associate, Postgraduate Course in Orthopaedic Medicine, Part A, with Dr. Gilbert Gagne, Stephanie Saunders, MCSP and Associates, Somerset, New Jersey, December 1-5, 1988

Teaching Associate, Postgraduate Course: Cyriax's Orthopaedic Medicine Course, Part B, with Dr. Donald Fraser, Stephanie Saunders, MCSP and Associates, Boston, MA, July 21-25, 1988
(Before 1988; several courses in orthopedics/musculoskeletal assessment)

HONORS/AWARDS

1973	Graduate, High Distinction, University of Minnesota
1978	Marion Williams Scholarship, Stanford University
1987	Dean's Research Incentive Award, Temple University, College Allied Health Professions, 1987 (joint award with K. Shepard, PhD)
1989-91	Arthritis Health Professions New Investigator Award
1992	California Chapter of the American Physical Therapy Association, Faculty Publication Award
1997-98	Creighton University, School of Pharmacy and Allied Health Professions, Faculty Scholarly Achievement Award
1999-00	Creighton University, School of Pharmacy and Allied Health Professions, Faculty Scholarly Achievement Award

2001	American Physical Therapy Association, Golden Pen Award
2002	American Physical Therapy Association, Catherine Worthingham Fellow
2003	Alpha Sigma Nu- inducted as honorary member; Jesuit Honor Society
2006	Alpha Sigma Nu National Book Award in the health sciences
2007	Honorary Doctorate, AT Still University, Phoenix, AZ, March 11, 2007
2008	American Physical Therapy Association, Lucy Blair Service Award
2010	Mary Lucretia and Sarah Emily Creighton Award
2011	Mary McMillan Lecture Award, American Physical Therapy Association

EXTERNAL DOCTORAL REVIEW COMMITTEES

1993	Schmitke, Joan: Perceptions and Meaning of Traumatic Injury, University of Alabama at Birmingham, School of Nursing.
1994	Liston, Colleen: The Structure of Accreditation, School of Education, Murdoch University, Perth, Western Australia.
1996-2002	Edwards, Ian: Clinical Reasoning in Three Different Fields of Physical Therapy. Master of Applied Science in Physiotherapy. University of South Australia, 1996-97; Doctoral committee 1998-2002.
1998-2000	Edwards, Ian: Clinical Reasoning Strategies in three different field of physiotherapy, Doctoral dissertation, University of South Australia, PhD completed December 2000
2001	Linda Resnik Mellon, Describing Clinical Experts in Physical Therapy Treatment of Low Back Pain, Doctoral dissertation, Nova Southeastern University.
2004	Susan Glover Takahashi, Stepping Out of the Shadows: The Learning of Ethical Conduct Through the I and Eye of Physiotherapists. Doctoral dissertation. University of Toronto, 2004
2004	Jeanette Praestegaard, The Ethical Dimensions of Clinical Reasoning and Clinical Practice, Doctoral dissertation University of Copenhagen, Denmark
2005-2009	Michele Mulhall, Adult Learning and Reflection. Doctoral dissertation. Capella University
2009	Helen Myezwa, Mainstreaming HIV/AIDS in Physiotherapy Education and Practice, University of Witwatersrand, Johannesburg, South Africa
2009-2011	Karen Huhn, The Effect of # of Clinical Reasoning Skills, University of New Jersey College of Medicine and Dentistry
2009	Nicole Christiansen, Development of clinical reasoning in student physical therapists. Physical Therapy, University of South Australia, Adelaide, Australia
2010-12	Cindy Myers, Qualitative Exploration of Patient-Practitioner Communication, University of Indianapolis
2013	Anthony McKenzie, A University Curriculum Framework for the 21 st Century, Charles Stuart University, Australia
2014-15	Vanessa Jewell, An Exploration into Occupation-Based Practice within Skilled V

CURRENT TEACHING RESPONSIBILITIES

IDC Ethics and Legal Issues in Clinical Medicine, School of Medicine; small group facilitator

PTD entry level Doctor of Physical Therapy campus program, Ethics in PT Practice

Fall Semester:

PTD 312 Seminar in Physical Therapy I, guest lecturer

PTD 556 Critical Inquiry I, guest lecturer

IDC 135 Ethics in Medicine (small group facilitator for M1 course); 20 hours; 15 students

Spring semester

PTD 435 Ethics in Physical Therapy Practice (3 sem hrs)

PTD 566 Critical Inquiry II, guest lecturer

Summer semester

PTD 445 Health & Human Behavior: Educational Strategies for Health Professionals, guest lecturer

Areas of prior teaching in professional education/graduate level (masters degree and DPT/tDPT; and OTD programs); (1981-2006):

Musculoskeletal Assessment I,II and III; Biomechanics; Clinical research; Curriculum Design; Clinical reasoning and decision making; Research Seminars; Qualitative Research Methods; Research Design; Instructional Design; Kinesiology for OTs; Evidence based Practice (OT); Theoretical Foundations in Research (nursing and PT); Psychological and Socio-cultural Aspects of Human Interactions; Health and Human Behavior: Educational Strategies for Health Professionals; Professional Seminars; Critical Inquiry I and II; Health Education and Health Promotion in Physical Therapy Practice; Clinical Research I: Evidence-Based Practice and Clinical Decision Making



**CONTENT EXPERT/FACULTY AGREEMENT
WITH APTA'S EDUCATION LEADERSHIP INSTITUTE FELLOWSHIP**

THIS CONFIDENTIAL AGREEMENT is made and entered into as of ____, 2016 by and between the American Physical Therapy Association ("APTA"), an Illinois not-for-profit corporation with offices located at 1111 North Fairfax St., Alexandria, VA 22314, and _____ ("Content Expert/Faculty").

WHEREAS, the APTA has a need for certain education consulting services in connection with the year-long APTA Education Leadership Institute ("ELI") Fellowship program, as set forth in detail on the APTA Web site, provided by the APTA's Education Leadership Institute Fellowship.

WHEREAS, the APTA would like the Content Expert/Faculty to perform services in connection with the online and onsite education components of the education leadership fellowship program, subject to the terms and conditions set forth below.

NOW, THEREFORE, for good and valuable consideration of the mutual agreements contained herein and acknowledged, it is agreed as follows:

1. Services and Responsibilities. The Content Expert/Faculty agrees to perform services for the APTA as specified in the Statement of Work, attached hereto as Exhibit A ("Statement of Work").

2. Compensation.

- A. **Consulting Fees.** The APTA shall pay the Content Expert/Faculty \$1,000 to complete the services set forth in the Statement of Work. APTA will pay \$500 thirty (30) days after Content Expert/Faculty completes the Module referenced in the Statement of Work, which shall be due at a date provided by APTA staff and \$500 thirty (30) days after the Webinar referenced in the Statement of Work, which shall be held at a date to be provided by APTA staff.
- B. **Reimbursement of Pre-Approved Expenses.** The APTA shall only reimburse Content Expert/Faculty for pre-approved travel, transportation, parking, etc. expenses incurred or paid by Content Expert/Faculty in connection with, or related to, the performance of the services under this Agreement. All other expenditures shall be the sole responsibility of Content Expert/Faculty.

3. Term and Termination. This Agreement shall be in effect from the date set forth above and shall automatically terminate on December 31, 2017 unless the parties mutually agree to extend the Agreement for a set period of time. The APTA may terminate this Agreement for a material

breach of the Agreement by the Content Expert/Faculty which remains uncured for more than thirty (30) days after delivery of written notice of such breach. The APTA may exercise this right to terminate by delivering a notice of termination. The APTA will pay Content Expert/Faculty for all services that Content Expert/Faculty performed through the date of termination.

4. Independent Contractor. Nothing herein shall be construed to create an employer-employee relationship between the parties and the parties further agree that Content Expert/Faculty is in fact an Independent Contractor and not an employee, agent, or partner of the APTA. Neither the APTA nor Content Expert/Faculty has the authority to bind or act for the other, or to assume each other's obligations or liabilities, other than as stated in this Agreement.

5. Ownership. To the extent the work Content Expert/Faculty performs under this Agreement constitutes an original work of authorship, Content Expert/Faculty agrees that such Work set forth in the Statement of Work (the "Work") shall be considered a "work made for hire", and it shall have no proprietary interest or claim in or to any such Work it creates pursuant to this Agreement. To the extent any of such Work is not deemed a "work made for hire", Content Expert/Faculty hereby assigns and agrees to assign to the APTA, Content Expert/Faculty's right, title and interest, if any, in or relating to such Work performed under this Agreement.

The APTA hereby grants to Content Expert/Faculty a royalty-free, irrevocable worldwide license to use, reproduce and distribute in any medium whether now known or hereinafter developed the Work that the Content Expert/Faculty creates under this Agreement. Subject to such license, the Content Expert/Faculty understands that the APTA retains the copyright to the Work.

APTA will retain all ownership rights to any work it performs, including under this Agreement, or any preexisting work owned by APTA.

6. Name and Biographical Information. Content Expert/Faculty shall provide the APTA with a picture and any updated biographical sketch of Content Expert/Faculty. The Content Expert/Faculty gives APTA permission to use, re-use, publish and republish in any medium the Content Expert/Faculty's name, likeness, photograph, and biographical sketch in connection with the use, distribution and promotion of the Work and APTA's ELI program.

7. Recordings. In addition to the licenses granted herein, Content Expert/Faculty hereby consents and gives APTA his or her permission to be recorded (including live broadcasting) while performing the Work in audio and visual form in one or more formats. Content Expert/Faculty understands that APTA will be the sole owner of the copyright in the recording. Content Expert/Faculty acknowledges that APTA will have full and final editorial control over all aspects of the Work.

8. Original Work. Copyright Permissions. Content Expert/Faculty warrants that the Work, except as noted in this paragraph, and any other material submitted by the Content Expert/Faculty are original works of authorship solely of Content Expert/Faculty, that their use or publication will not infringe on the rights of others, and that Content Expert/Faculty has full power to grant these rights and license. Should the Work or other materials submitted by Content Expert/Faculty require permission for use by APTA, Content Expert/Faculty agrees to obtain that permission from the copyright proprietor consistent with this Agreement prior to

the presentation of the Work and any other materials.

To the extent that Content Expert/Faculty is using prior existing intellectual property that it owns or licenses to perform the Work, Content Expert/Faculty shall clearly identify said as such. The Content Expert/Faculty hereby grants to APTA a royalty-free, irrevocable worldwide transferable license to use, reproduce, distribute, publicly perform, transmit, publicly digitally perform, publicly display, translate, create derivative and/or collective works from and otherwise use live and/or in any medium whether now known or hereinafter developed, the prior existing intellectual property that the Content Expert/Faculty may provide in connection with the Work. Subject to such license, the Content Expert/Faculty understands that the Content Expert/Faculty retains the copyright to the prior intellectual property and that this license does not prohibit the Content Expert/Faculty from, among other things, using, reproducing or distributing such in any medium whether now know or hereinafter developed.

9. Logos. All pre-existing Content Expert/Faculty copyrights, trademarks, logos, and service marks, are and shall remain the property of Content Expert/Faculty. All APTA copyrights, trademarks, logos, service marks, text and content of the APTA are and shall remain the property of the APTA.

10. Indemnity. Content Expert/Faculty agrees to indemnify and hold the APTA harmless from and against any and all claims, expenses (including reasonable attorney’s fees), and liability whatsoever arising, directly or indirectly, from the inaccuracy or breach of any of the Content Expert/Faculty’s warranties and representations.

11. Confidential Information. Content Expert/Faculty understands that the APTA possesses confidential and proprietary information which is important to its business and that this Agreement creates a relationship of confidence and trust between Content Expert/Faculty and the APTA with regard to this information.

IN WITNESS WHEREOF, the parties hereto have executed this Agreement as of the day and year set forth above.

American Physical Therapy Association

By: _____
Libby J Ross
APTA Director, Academic Services and
Program Director, ELI Fellowship

Content Expert/Faculty

By: _____
Dr. []

Exhibit A

Statement of Work

The Content Expert/Faculty shall complete the following Scope of Work (“Work”):

1. Online Education Component

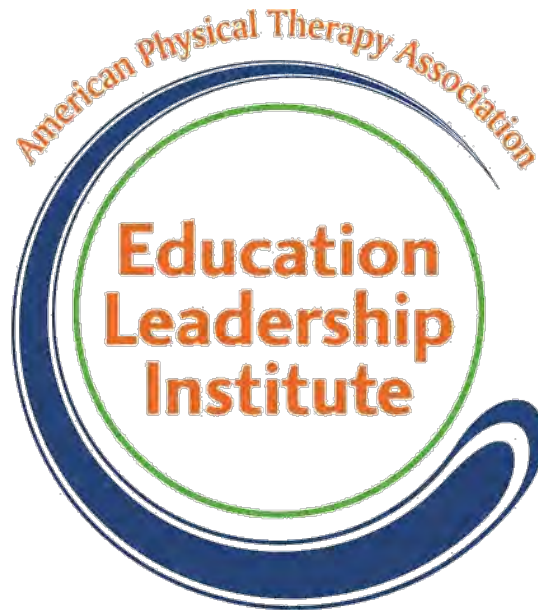
- A. **Learning Objectives:** Review and provide any revised specific learning objectives to be achieved by the participant at the completion of the Module to include those learning objectives that were provided by the ELI Committee. When appropriate, the Content Expert/Faculty may work in collaboration with the APTA to further develop learning objectives.
- B. **Module Content:** Review and edit PowerPoint slides (maximum of 180 slides permitted that is equivalent to 4 hours of work) that address updates in the content and, as appropriate, create and include in the PowerPoint slides, AMA style citations to support content and when possible, provide a hyperlink to such citations. The review and revision of the PowerPoint shall be completed by a date provided by APTA staff and this date can be modified by agreement of the parties.
- C. **Experiential component:** Review and edit in the PowerPoint any of the interactive/experiential components for active and reflective learning, to include, but not be limited to, cases and reflective/thought-provoking questions.
- D. **Glossary:** Review and add any Glossary of key terms associated with the content.
- E. **Assignments:** Review and revise as needed, specific assignments for participants to complete during the Module with the assignment designed to translate theoretical knowledge and apply practical applications of key concepts.
- F. **Reading lists:** Review and modify, as appropriate, required reading list for participants using AMA style and when possible, provide a correct hyperlink to the reference. Review/revise required and recommended reading list for participants to enable them to further explore the Module topic.
- G. **Post-Assessment:** Review and revise, as needed, 25-30 exam questions (multiple choice or true/false) and answers that can be electronically scored. The post-assessment will be completed at the end of the online Module. The questions should correspond to the Module’s learning objectives.

- H. **Discussion Board:** To engage participants in a discussion about content, participate in an asynchronous discussion board with participants. On this discussion board, pose and respond to questions, clarify information, discuss assignments, and promote reflective thinking and learning, etc. Participants will be able to access and complete a module during a 3-month period.
- I. **Virtual Office Hours:** Provide 3, 2-hour blocks of time where participants can access faculty to respond to questions, postings that have been shared on the discussion board, and to otherwise engage learners in dialogue about the content. Every attempt will be made to identify time blocks that are on different days and blocks of time to enable learners to be able to participate in at least one virtual session.
- I. Work in collaboration with the APTA to change and adjust content when deemed necessary.

2. Onsite Education Component

- A. Be available for 2 hours by live Webinar during an ELI onsite session for faculty to respond to prepared questions, participants and mentors to pose new questions, faculty to highlight key concepts from the Module and to share new developments or “hot issues” related to the topic. APTA will provide the specific dates and times that the Content Expert/Faculty will need to be available along with the necessary information to access the Webinar.

This Statement of Work may be modified by mutual agreement of the parties.



Education Leadership Institute Mentorship Guide

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Part Two

Resources for Effective Mentoring Techniques

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Part One

Purpose of Mentorship for the Educational Leadership Institute Fellowship

Mentorship is an integral part of the Education Leadership Institute Fellowship experience. It serves to link the individual fellows-in-training in order to share experiences and ideas. Mentorship also gives each fellow-in-training access to a 2-person mentoring team of experienced academic physical therapy leaders whose responsibility it is to challenge, coach, and reflect with fellows-in-training on presentations, readings and small group discussions between and during the onsite meetings. Fellows-in-training connect with one another as they read, reflect, and discuss leadership topics between onsite sessions using an on-line interactive format. It is the role of the mentor to facilitate this interactive learning experience for the fellows-in-training during the course of the Fellowship. The mentorship group will also meet with mentors during the onsite meetings to engage in small-group, face-to-face discussions and problem solving. ELI graduates develop professional peer groups well after the conclusion of the Fellowship experience.

Specifically, the objectives of the mentorship experience are to:

- Provide a small group forum for guided discussion, reflection, and informal interaction around the learning experiences of the Fellowship.
- Establish a cohort of novice leaders who can be leadership resources for one another and others in the future.
- Provide each small group with access to a mentor who demonstrates effective academic leadership to serve as a guide, coach, and facilitator to the group.
- Develop future mentors for the Education Leadership institute through effective mentorship role modeling.

Part One

Goals of the Mentoring Relationship

The mentor is a critical component of the Education Leadership Institute Fellowship experience. While leadership principles, values, and practices can be explored, the presence of a leadership role model and coach is important to the learning experience of these fellows-in-training as emerging academic leaders. To that end, the mentor serves as the cohort facilitator and guide, as well as a resource for leadership experience and an example of successful academic leadership. The mentor's task is not so much to direct or teach the mentorship group, but to serve as a model and facilitator of the learning process during the Fellowship experience. As with any mentoring relationship, success is based on the engagement and interest of both the mentor and the fellow-in-training. The mentor, however, must be prepared to promote this mentoring relationship by providing support, sharing experiences, and challenging the thinking of each fellow-in-training.

Specifically, the mentoring relationship will:

- Provide a role model in academic leadership for novice academic administrators.
- Provide a role model in effective mentoring techniques as they may be used by academic leaders with their faculties.
- Provide for each novice academic administrator an individual professional resource who can serve as coach, sounding board, and guide.

Part One

Mentor Position Description

Overview

Mentors are an essential component throughout the entire program of the ELI Fellowship to provide guidance to fellows-in-training in a focused learner-centered program. They are full participants in the onsite and online aspects of the program and have access to all materials. These individuals provide regular, timely, and close interaction with the fellows-in-training through coaching, advising, and thought-provoking questions on an individual level, as well as through their assigned small group during the Institute. Collectively, mentors represent diverse institutional settings including public/private and Carnegie classifications, as well as physical therapist and physical therapist assistant academic programs.

Qualifications

Ideal characteristics of the mentors are that they are senior physical therapists or physical therapist assistants who are active or recently retired faculty with significant experience and success as program directors or leaders in physical therapy education, APTA members who satisfy the Commission on Accreditation in Physical Therapy Education (CAPTE) criteria for program administrators, and possess the following attributes:

- Exhibit strong interpersonal and communication skills, including listening, negotiating, conflict resolution, and facilitating creative thinking in others.
- Strategic thinkers, analytical, able to apply data in decision making, and consider new relationships to promote physical therapy higher education programs.
- Positive and optimistic regarding the role of an academic administrator and the future of physical therapist and physical therapist assistant education programs.
- Demonstrate balance in their roles and responsibilities and foster this in others.
- Effective at facilitating discussions and empowering others.
- Foster application of learned theory, principles, and emerging concepts in higher education to their home institution.
- Articulate a clear view of the role of the consumers/recipients of physical therapy education, including the students and other stakeholders.
- Observant of change in the environment and able to impart a vision of “future” to faculty.
- Understand organizational change in both the macro and micro environment and can respond positively.
- Understand emerging demands on physical therapists and physical therapist assistants in the 21st century.
- Patient with learners who struggle to understand and adapt to new organizational challenges.
- Skilled at creating fiscal approaches to meet changing program demands.
- Demonstrate a value for understanding broad issues in health care that do or may affect the preparation of physical therapists and physical therapist assistants.
- Open to learning about and facilitating the use of new ideas and approaches with fellows-in-training.
- Demonstrate an interest in and the humility to learn from others.

Part One

Program Requirements

Mentors commit to full participation in the program including all onsite and online sessions.

- Facilitate 3 onsite sessions through probing questions, reflective thinking, and problem solving.
- Serve as consultants to fellows-in-training.
- Meet with other program leaders for planning purposes.
- Be available via the mentorship online community on the APTA Hub between 3 onsite sessions to address issues, promote reflection, and apply principles.
- Conduct conference calls or webinars with cohort at least once per month between onsite sessions.
- Serve as a resource for the fellow-in-training leadership projects.
- Participate in the ongoing assessment of the fellows-in-training, program, and mentors.
- In pairs remain with same cohort of fellows-in-training throughout the program.

Format of Mentorship

Mentors work in pairs with a small group of approximately 5-6 novice academic leaders. The same mentors work with the cohort of 5-6 fellows-in-training throughout the year of the Fellowship. The mentors participate in each of the onsite sessions throughout the year and are familiar with the content of the Fellowship's curriculum. Between onsite sessions, mentors facilitate group communication on the discussion board using guiding questions and reflections on the reading associated with each module. Mentors also serve as resources in the development of each fellow-in-training's Leadership Project, which are presented at the end of the year at the alumni event in October. Mentors should encourage interaction among the small group of novice academic leaders, not just with mentors, to optimize strengths of each member in the group.

Activities/Timetable

- WELCOME: Mentors participate in the ELI program welcome and orientation Webinar to new fellows-in-training in July.
- FACILITATE: Modules 1-3. Facilitate participant activities/pose questions/facilitate discussion board communication. (Modules 1-3 occur prior to the first onsite meeting in October.) Facilitation occurs during agreed upon times for subgroups based on their preferred methods for communicating between the orientation and the first onsite session.
- ONSITE MEETING: Attend first meeting of the Fellowship that occurs prior to the Education Leadership Conference (ELC) in October and serve as small-group facilitators.
- ASSESSMENT: Formative mentorship assessment designed to enhance mentorship experience throughout the remainder of the Fellowship.
- FACILITATE: Modules 4-6. Facilitate participant activities/pose questions/facilitate discussion board communication. (Modules 4-6 occur after the first onsite session and prior to the second onsite meeting in March.) Facilitation occurs with agreed upon times to convene the subgroups based on their preferred methods for communicating between the first and second onsite session.
- ONSITE MEETING: Attend second onsite session that occurs in March and serve as small-group facilitators during this meeting.
- FACILITATE: Modules 7-9. Facilitate participant activities/pose questions/facilitate discussion board communication. (Modules 7-9 occur after the second onsite session and prior to the third onsite meeting in July.) Facilitation occurs during agreed upon times for subgroups based on

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their preferred methods for communicating between the orientation and the first onsite session.

- **ONSITE MEETING:** Attend third onsite meeting of the Fellowship that occurs in July and serve as small-group facilitators during this meeting.
- **ASSESSMENT:** Summative Mentorship Assessment to provide feedback to mentors and fellows-in-training.
- During the year, mentors serve as a resource to each novice academic leader as they develop their Leadership Project and prepare for a year-end presentation.

Mentorship Assessment

The goals of mentorship assessment are to 1) improve the mentorship experience and 2) maximize the learning of each fellow-in-training. The focus of mentorship assessment is on the process of mentorship, rather than the specific individual participant or mentor, although the effectiveness of each is included.

Mentorship assessment does not address the content of the Education Leadership Institute Fellowship. The content review occurs via other assessment activities. Mentorship assessment seeks, however, to assess the effectiveness of the small group process, the role modeling and facilitation role of the mentor, and the engagement and contribution of each fellow-in-training.

Mentorship assessment occurs three times throughout the Fellowship. The first assessment occurs following Modules 1-3 and the first onsite session in October. The second mentorship assessment occurs after the second onsite session, and the third mentorship assessment takes place in July following the third and final onsite session. The purpose of the first assessment is to effect changes in the mentorship process and the purpose of the second and third assessment is to provide feedback to mentors and fellows-in-training.

Assessment components includes both a self-assessment completed by each mentor and each fellow-in-training, and a peer assessment. The peer assessment completed by fellows-in-training is limited to 2 peer participants and both mentors. The mentors as a team provide feedback to each of the fellows-in-training and to one another. It is the responsibility of each person (mentor and fellow-in-training) to receive the assessment data and to develop a plan to enhance their contribution to the mentorship process. The content of mentorship assessment includes the following performance areas (adapted from the University of Massachusetts at Amherst, Office of Faculty Development, and Mutual Mentoring Guide):

1. Shares his or her knowledge and experience.
2. Listens actively and nonjudgmentally.
3. Asks questions and makes suggestions that promote reflection.
4. Gives and seeks thoughtful, candid, and constructive feedback.
5. Provides support and encouragement.
6. Is regularly accessible.
7. Acts as an advocate for others in the mentorship relationship.

The formal assessment rates each person and offer comments in each content area of assessment. Mentors are responsible for facilitating the completion of self and peer assessments. Staff facilitates the exchange of these assessments with the mentorship group. Fellows-in-training and mentors are

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responsible for reviewing their assessment information and developing a plan to enhance their contribution to the mentorship process.

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Resources for Effective Mentoring Techniques

There is a substantial body of literature on mentorship, addressing different mentoring recipients, mentorship techniques, strategies, and outcomes. The following specific mentorship readings are considered suggested reading for mentors in the Educational Leadership Institute. Please consider these carefully. They may be of use to mentors as they refine their role as mentor within the Education Leadership Institute Fellowship. Although all of the references and websites listed are excellent resources; those noted with an asterisk (*) are recommended for review.

References

1. Cox MD. Introduction to faculty learning communities. *New Directions for Teaching and Learning*. 2004; 97(Spring), 5-23. Available at: <http://onlinelibrary.wiley.com/doi/10.1002/tl.129/abstract>

This article describes the nature of faculty learning communities (group mentoring), existing programs at a variety of institutions, and characteristics necessary for successful mentoring.

2. Phillips-Jones L. *Skills for Successful Mentoring: Competencies of Outstanding Mentors and Mentees*. Grass Valley, CA: CCC/The Mentoring Group; 2003.* Available at: <http://www.mentoringgroup.com/html/products.html>

This booklet describes the skills necessary to manage effective mentoring partnerships. For purchase only. APTA will provide you with a copy of this booklet.

3. Sorcinelli MD, Yun JH. From mentor to mentoring networks: mentoring in the new academy. *Change*. 2007; 39 (November/December):58-61.* <http://www.changemag.org/Archives/Back%20Issues/November-December%202007/index.html>

This article highlights faculty development resources on mentoring published since 2000. The article is organized into 4 topics: 1) new conceptualizations of mentoring, 2) recent studies on mentoring, 3) faculty-development programs and practices that promote mentoring, and 4) gender, race, and other diversity issues related to mentoring.

4. Sorcinelli MD, Yun JH. Finding a Mentor. Thriving in Academe. *National Education Association*. 2009; 26(5): 5-8. Available at: <http://www.umass.edu/ofd/mentoring/resources.html>.

This reference describes a “Mutual Mentoring” approach that creates a network of mentors for a variety of needs and participants and includes a description of best practices in mentoring relationships.

5. Trower CA. Toward a greater understanding of the tenure track for minorities. *Change*. 2009; September/October:38-45. Available at: <http://www.changemag.org/Archives/Back%20Issues/September-October%202009/abstract-a-greater-understanding.html>

This article presents the unique considerations of junior faculty of color and how to address these issues in their career development.

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6. Ilen TD, Eby LT. Factors related to mentor reports of mentoring functions provided: gender and relational characteristics. *Sex Roles*. 2004; 50(1):129-139. Available at: <https://springerlink3.metapress.com/content/n974321405102371/resource-secured/?target=fulltext.pdf&sid=ksevgj55xxnfvf4553po2jl55&sh=www.springerlink.com>
7. Bellini LA, Anderson DM. The benefits of formal mentoring for practitioners in therapeutic recreation. *Therapeutic Recreation Journal*. 2003;37:240-255. Available at: <http://www.highbeam.com/doc/1P3-500808871.html>

Web sites

1. American Council on Education [www.acenet.edu/resources/chairs/?CFID=11240378&CFTOKEN=92150461&jsessionid=16308aa81b5c\\$F4FX\\$C9](http://www.acenet.edu/resources/chairs/?CFID=11240378&CFTOKEN=92150461&jsessionid=16308aa81b5c$F4FX$C9).

This component of the Web site provides excellent resources for department chairs, including the document titled, "Words of Advice from Department Chairs and Deans." This document contains suggestions made by chairs that have enrolled in American Council on Education workshops for department/division chairs since November 1999. Their comments are divided into the following categories: 1) chairs appointed from within an institution, 2) chairs appointed from outside the institution, and 3) deans. This document also includes comments from a variety of institution types.

2. Harvard University, Development and Mentoring www.faculty.harvard.edu/development-and-mentoring/faculty-mentoring-resources/department-chair-resources

This Web site includes practical resources for department chairs in the areas of mentoring, department climate, and faculty retention.

3. University of Massachusetts at Amherst, Office of Faculty Development* www.umass.edu/ofd/mentoring/resources.html

This Web site provides a list and description of mentoring resources. This resource includes a Mutual Mentoring Guide that describes "the state of mentoring in academia; explains the benefits of the Mutual Mentoring model; provides suggestions for protégés, mentors, and department chairs; and describes sample mentoring projects." A helpful Guideline for Mentors also is included.

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AMERICAN PHYSICAL THERAPY ASSOCIATION 2016 STRATEGIC OPERATIONS AND BUDGET PLAN



American Physical Therapy Association

Activity Budget Worksheet

For Budget Year 2016

Activity Name:	Educational Leadership Institute (ELI)
Activity Type:	Program
Activity Number:	62-05

Unit:	Professional Affairs
Department:	Education
Budgeteer:	Libby Ross

Total Revenue:	\$ 99,540
Total Expenses:	\$ 161,240
Net Revenue:	\$ (61,700)

Brief Activity Description (detailed description can be found in the Work Plan)

The Education Leadership Institute (ELI) Fellowship is an ABPTRFE accredited fellowship in higher education and reflects a shared collaborative between ACAPT, Education Section, PTA Educators SIG, and APTA. This yearlong blended learning program is designed to develop PT and PTA program directors and residency and fellowship directors with leadership skills to educate students about contemporary theories and research, facilitate change, implement strategic solutions in education in response to changes in health care and society, and engage in public discourse to advance the physical therapy profession. Evidence demonstrates that ELI graduates think more strategically and are transformed as leaders in PT and higher education. APTA provides opportunities for ELI fellows-in-training and graduates to network as a community online and in person.

Expenses

Detail the expenses needed for this activity.

Expense	GL Code	Amount
Salaries	600	\$ 32,160
Benefits	602	9,600
Payroll taxes	603	2,300
Recruitment	604	-
Temporary employ.	605	-
Equipment leasing	606	-
Publish contract	607	-
Depreciation	610	-
Copying	611	1,250
Maintenance/repair	612	-
Occupancy	613	3,400
Supplies	614	500
Telephone/fax	615	-
Postage/shipping	616	-
Small office furn.	617	-
Printing - general	620	1,000
Printing - resale	621	-
Printing - Journal	622	-
Printing - PT Mag	623	-
Advertising	624	-
Audiovisual	625	8,050
Data processing	626	-
Staff training /CE	629	-
Travel - staff	630	5,580
Travel - member	631	29,100
Travel - nonmember	632	960
Teleconferencing	634	-
Meeting services	635	31,840
Honoraria	636	19,550
Exhibits fees	638	-
Legal fees	639	-
Prof. charges	640	9,500
Awards/grants	641	-
Commissions	643	-
Consultants	645	-
Dues	650	6,410
Subscriptions	651	40
Insurance	652	-
Misc. donations	660	-
Doubtful accounts	695	-
Taxes	696	-
Distrib. to sections	697	-
Bank fees	698	-
Miscellaneous	699	-
Total expenses		\$ 161,240

Revenue

Detail the revenue this activity earns, if any.

Revenue	GL Code	Amount
Dues income	420	\$ -
Interest income	421	-
Contract income	424	1,040
Accreditation fees	435	-
Examination fees	436	-
Commissions	437	-
Staff services	438	-
Donations	440	-
Miscellaneous	444	-
Registration fees	451	98,500
Exhibit booth fees	452	-
Special events	453	-
Instructural courses	454	-
Subs - PT Partners	464	-
Subs - PTM NM	465	-
Subs - PTJ NM	466	-
Subs - Hooked	467	-
Subs - Other	469	-
Subs - PTM Mem	488	-
Subs - PTJ Mem	491	-
Ads - Display	502	-
Ads - Classified	503	-
Ads - Agency Comm	504	-
Ads - Program	505	-
Sale of mailing labels	516	-
Royalties - other	517	-
Sale of reprints	525	-
Sale of printed materials	526	-
Sale of promo items	527	-
Total revenue		\$ 99,540

Summary and Percentages

Information calculated based on numbers to the left.

Percentage of Staffing Expenses		
Salary	\$ 32,160	19.95%
Benefits and payroll taxes	11,900	7.38%
Other personal expenses	-	0.00%
Total	\$ 44,060	27.33%

Percentage of Non-Staffing Expenses		
Professional charges	\$ 9,500	5.89%
Meetings expenses	39,890	24.74%
Office expenses (note A)	5,150	3.19%
Travel	35,640	22.10%
Printing and postage exp.	1,000	0.62%
Awards and grants	-	0.00%
Honoraria	19,550	12.12%
Bank fees and taxes	-	0.00%
Other expenses (note B)	6,450	4.00%
Total	\$ 117,180	72.67%

Total expenses	\$ 161,240	100.00%
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Note A - Office expenses include depreciation, equipment leasing, copying, maintenance and repairs (of both software and buildings), occupancy, supplies, telephone and teleconferencing, small office furniture, data processing, and insurance.

Note B - Other expenses include publishing contracts, advertising, staff training, commissions, dues, subscriptions, donations, doubtful accounts, and misc.

Other Revenue or Expense Information

New 62-05 reflects revenues and expenses for the Educational Leadership Institute (ELI) Fellowship. ELI was previously part of 62-04 in the 2015 budget. Budget assumes there will be a 2016-17 cohort. If there is no 2016-17 cohort, then the total expenses to complete the 2015-16 ELI cohort in July 2016 would be \$77,050 and total revenues would be \$1040. If APTA decides to suspend ELI for one year and accept new applications for the 2017-18 cohort in fall 2016, then APTA would need to add back these related revenues and expenses into the 2017 budget.

Nomination Form

Education Leadership Institute Fellowship Application

The following items below need to be completed by the Program Director, Dean, or Administrator/Supervisor for the ELI Nominee.

- Nominator Information
- Nomination Letter
- Nominees Capabilities
- Overall Assessment
- Institution Statement of Commitment

NOMINATOR INFORMATION (please Tab through to enter data)		
Name of Nominator:	Position/Title:	
Name of Applicant:	Position:	
Academic Institution:		
Address:		
City:	State:	Zip:
Work Phone: () - ext.	E-Mail:	

Both the qualities of the applicant and the commitment of the institution are considered in the selection process. A strong nomination provides evidence of a clear commitment to the applicant in the plan for development as an academic

current Program Director, Dean or other appropriate Administrator/ Supervisor. For more information about the ELI Fellowship click [here](#).

NOMINATION LETTER

In your nomination letter please address the following:

1. How long you have known the nominee and in what capacity?
2.) supervision and delegation, communication, and collaboration.
3. Provide your vision of future prospects for this applicant in a leadership position within your institution or growth in their current leadership position.

Nomination Form

Education Leadership Institute Fellowship Application

NOMINEES CAPABILITIES

Please candidly assess the nominee by checking the most appropriate box for each category provided. It is not an expectation that the nominee will have strengths in all categories. You are encouraged to share your assessment with the nominee. (Check only one box per category.)

CATEGORY	CURRENT STRENGTH	OPPORTUNITY FOR GROWTH	DO NOT KNOW
Provides leadership	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Works collaboratively	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Manages projects	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Accepts feedback	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Manages conflict	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Supervises individuals, activities, or tasks professionally	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Delegates responsibilities, decisions, and tasks to others	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Manages time efficiently	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communicates effectively in writing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communicates effectively orally	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

OVERALL ASSESSMENT

- I highly recommend this applicant.
- I recommend this applicant.
- I recommend this applicant with reservation.
- I do not recommend this applicant.

INSTITUTION STATEMENT OF COMMITMENT

Should the applicant be accepted for the Educational Leadership Institute, the institution pledges support that includes but is not limited to:

- a year-long commitment of time for the applicant to participate in this program (July 2016 – July 2017).
- program tuition of \$6,000.
- full or partial assistance in providing additional resources to attend the ELI Fellowship including texts/resources, hotel, and travel for 3, 2-day onsite sessions on October 5-6, 2016; March 8-9, 2017; and July 13-14, 2017.
- participation in ongoing assessment of the participant and the program.

Your signature below indicates your acceptance of the Statement of Commitment as seen above.

Signed:

Type Name Here

Date: MM/DD/YY

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REPORT: NEEDS ASSESSMENT FOR EDUCATION LEADERSHIP DEVELOPMENT

Executive Summary

Faculty shortages threaten the future of physical therapist and physical therapist assistant education programs. Based on the mean age of current Program Administrators, it is expected that there may be a large turnover of education program leadership within the next 5-10 years. APTA convened a consultant group to investigate the need for continued focused leadership programs within physical therapy education in an effort to address potential issues related to future qualified leaders. This effort is consistent with Goals 11 and 5 of APTA's Education Strategic Plan.

A review of the literature suggests that leadership development programs are important for the future success of any profession/organization. Educational Leadership Institutes appear to be effective in developing educational leaders. The consultant group performed a needs assessment and the following information was obtained:

- A majority (57%) of respondents reported interest in an educational leadership institute.
- Eighty-four percent (84%) of respondents indicated a desire for a blended approach to content delivery, including online and on-site educational experiences.
- Eighty-three percent (83%) of respondents reported that the total cost of an educational leadership program range from \$500-\$2500 with most respondents recommending a shared responsibility for the cost of the program (cost shared between the individual, institution, and APTA).
- The survey sampling included physical therapist and physical therapist assistant program directors, academic faculty, ACCEs/DCEs, and clinical residency and fellowship directors from most states and all regions of the United States.

The consultant group has prepared the following draft report for the APTA to provide documented information about the need and interest for an educational leadership institute. The success of this institute would require the inclusion of educational leaders within the Education Section of APTA and the Academic Administrators Special Interest Group (AASIG) for content development and delivery with involvement of other interested parties/groups as relevant.

Preamble

Faculty shortages in physical therapy are threatening the capacity of the health professions educational infrastructure as reported by Academic Health Center CEOs¹. This along with other compelling evidence supports the need for expanded leadership development within physical therapy education. The need for increased capacity of well-trained faculty is substantiated by workforce data, physical therapy program leadership demographics, anecdotal evidence derived from a large cross-section of stakeholders including the Education Section, AASIG, CAPTE, Academic/Clinical Education Affairs, and contemporary literature addressing global trends in higher education.

Recently, there has been a growing concern over the ever-increasing reports of a workforce shortage in healthcare and the physical therapy profession. A workforce shortage will require greater demands on the education community to produce increased numbers of qualified health care practitioners, specifically physical therapists and physical therapist assistants to meet this demand. Hence, the need for well-qualified faculty will increase as workforce shortages grow. The Department of Labor² reports that health care will generate 3 million new jobs between 2006 and 2016, more than any other industry. They attribute the growth to the increasing number of people in older age groups who are the largest consumers of health care,

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technological advances that increase the survival rates of severely injured or ill people, and the shift from inpatient to less expensive outpatient and home health care.

For physical therapists and physical therapist assistants, recent evidence suggests that we are currently in a workforce shortage. Vacancy and turnover rates have been published in the literature, demonstrating relatively high rates (Table 1).

State	Vacancy Rate (%)		Turnover rate (%)		year
	PT	PTA	PT	PTA	
Alaska ³	16.5	28.6	nr	nr	2007
Florida ⁴	12	nr	8	nr	2006
Maryland ⁵	18.5	12.6	14.5	12.1	2005
New York ⁶	9.9	nr	12.8	nr	2007
North Carolina ⁷	26	8	nr	nr	2006
Pennsylvania ⁸	10.7	nr	nr	nr	2005
Rhode Island ⁹	6.3	12.2	nr	nr	2004

Table 1: Vacancy and Turnover rates for Physical Therapists (PT) and Physical Therapist Assistants (PTA) (nr: not reported)

In addition, further evidence suggests that vacancy and turnover rates are increasing. The *Maryland Hospital Association 2005 Annual Survey*⁵ of 50 hospitals reported that the physical therapist vacancy rate went from 10.2% in 2003, to 16.2% in 2004, to 18.5% in 2005. This represents one of the largest growths in vacancy rates for all health care workers for that state. Interestingly, the average time to fill the open vacancy increased for physical therapists from 53.3 days in 2003 to 55.5 days in 2005. Likewise, vacancy rates grew for PTAs although less sharply from 10.3% in 2003, to 12.1% in 2004, to 12.6% in 2005. The time to fill those positions increased from 34.4 days in 2003 to 43.1 days in 2005.

Variations exist in practice settings and geographical regions. In the *North Carolina: Allied Health Job Vacancy Tracking Report*⁷, the vacancy rate for physical therapists in hospital settings was reported as 21% and in home health was 13%, yet for private practices the vacancy rate was only 7%. Physical Therapist Assistants vacancy rate was highest in rehabilitation centers (19%), followed by the hospital setting (16%), and then long term care institutions (13%). The American Physical Therapy Association¹⁰⁻¹² performed a national survey of acute care hospitals, skilled nursing facilities, and outpatient private practices to determine vacancy and turnover rates. Again, significant practice setting variations were reported. For acute care institutions, the vacancy rate for physical therapists was 13.8% and 12% for physical therapist assistants. The turnover rate in the same setting for full-time physical therapists was 15.9%. For skilled nursing facilities, the full-time physical therapist vacancy rate was 18.6% and 16.6% for physical therapist assistants. Alarming, the turnover rates were highest among full-time physical therapists at 85.2% with turnover rates of 82.4% among full-time PTAs. In addition, the time to fill these positions was significantly different with more than 7% of respondents indicating that it has taken them 10 years to fill a position. In outpatient private practices, the vacancy rates were lower compared to acute care institutions and SNFs and were reported as 13.1% for full-time physical therapists, and 8.8% for physical therapist assistants.

In examining current data from the 2007 Annual Accreditation Report¹³, PT program directors' mean age is 53.8 years (range = 36-77 years) while PTA program directors' mean age is 48.8

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years (range = 31-77 years). By 2010, 31% of PT program directors will be 60 years or older, which raises a concern about the need for succession planning and the development of new program directors. Additionally, 45% of PT program directors and 41% of PTA program directors are within the first 5 years of their current position. This number includes new program directors as well as program directors in new roles, which further reinforces the need for ongoing program director development.

Anecdotal evidence about the number of faculty vacancies and the length of time required to fill those positions suggests a need for an increased number of qualified faculty, program directors, and leaders in physical therapy education. This need for an increase in the number of faculty members is further reinforced by the fact that 33 new PTA and 2 new DPT programs are currently being developed.¹⁴ In addition, academic programs report a slight increase in planned class size, especially in DPT programs. Pressure to increase class size is accentuated by the increasing number of qualified applicants to these programs. With increases in class sizes comes the need for additional faculty.¹³ As program expansion and rapid turnover in physical therapy education leadership occurs, opportunities for developing critical mentoring relationships among available existing faculty and program directors is more limited than it has ever been. Feedback from novice program directors indicates the desire for enhanced skill development in program management, assessment, and leadership. The Education Section provides a new Faculty Development workshop that has been successful, however, continued advancement in the role of faculty as leaders is recognized as an ongoing need.

Review of the Literature

Leadership development is a challenge in contemporary society in which the leadership paradigm is changing. This change includes demands for future leaders to address the dynamic needs and demographics of learners, changing relationships with colleagues, new pressures on higher education, advancing technology, and the influence of global economy and learning communities.¹⁵ A commonly accepted approach to leadership development is the creation of education leadership institutes. Model examples are offered by many health professions such as Medicine (AAMC)¹⁶, Dentistry (ADEA)¹⁷, and Speech-language-hearing pathology (ASHA)¹⁸.

Urgency for Leadership Development

Consider that past measures of success in higher education may not be predictive of future successes. Margaret Wheatley¹⁹ describes leading in a changing society. She suggests there is a paradox...gaining clarity about who we are as a group creates freedom that benefits the individual's contributions while enhancing the capacity for the organization. Wheatley emphasizes that to develop organizations of greater and enduring capacity; we must rely on the individuals within that organization by encouraging their creativity and commitment necessitating a change in how we lead.

Likewise, leadership development should be considered broadly within the context of higher education as it relates to state and federal government, local community, university and governing boards, and higher education administrators and faculty.²⁰ Leaders within higher education must provide the initiative, in conjunction with an array of other stakeholders, to create a stronger sense of community to meet the educational needs of learners in the 21st century. In addition to increasing costs, the public has grown largely disgruntled with the lack of measurable outcomes in higher education, fostering a sense of urgency for higher education to remain accountable.²¹ Evidence for quality education stems from a lack of consensus on what constitutes evidence, let alone what constitutes quality. To meet challenges of the 21st century, higher education must change from a system primarily based on reputation to one based on outcomes performance. Higher education is challenged to create a robust culture of

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accountability and transparency. These concerns are becoming increasingly more important to educational leaders in health professions including physical therapy.

The US ranks 12th among major industrialized countries in higher education degree attainment, a strong indicator of this nation's shortfall in higher education.¹⁵ Given global competition in higher education, and the fact that a nation's wealth will be measured in part, by its intellectual capital and the capacity to educate, attract, and retain citizens, higher education and its leadership must be able to work smarter, learn faster, create new alignments, be active in public policy, and provide evidence of ongoing change.²¹ Higher education as a mature enterprise is risk averse and slow to change. It is slow to address the need for transforming programs and institutions to address our knowledge economy, rapidly evolving technologies, increasingly diverse and aging population, and a contemporary marketplace with new needs and new paradigms. The call is that higher education demonstrate greater flexibility and innovation to accommodate the needs of new learners.¹⁵

To enable higher education to demonstrate change will require capable leaders developed within our educational ranks. Leaders in physical therapy must work seamlessly with other leaders across the institution and be pioneers and ambassadors for a changing vision within higher education. When leaders embrace a culture of continuous innovation and quality improvement and risk developing new pedagogies, curricula, and technologies to improve learning, learners will have access to high quality and affordable education and lifelong learning opportunities.

Leadership Program

Contemporary leadership involves widely distributing responsibilities widely among members of a group rather than defining them by hierarchical positions, control, command, or personal characteristics. Distributing accountability results in greater efficiency and reduction in overall costs.^{22,23} Ford¹⁰ describes four roles for the contemporary leader – direction setter, change agent, spokesperson, and coach. Additionally, contemporary leaders are visionary and have the capacity to think in the longer term beyond the day's.^{22,23}

Leaders may occupy many roles in higher education, not simply those “at the top”. The issues most organizations face today demand an expansion of the definition of leadership to include those not traditionally labeled as “leaders”. With increasing change, a demand for multi-factorial leadership behaviors is required of many rather than a few. A new definition of leadership describes a process rather than people. In today's world, there is a difference in the roles of a “positional leader” versus “leaders as students of organizational behavior and change”. Leaders empower others, are egoless, allow others to do what they aspire and what they need to do with the assistance of the leader.²²

Leadership development programs should consider:

- development of leadership behaviors rather than the organizational position or personal characteristics,
- facilitating distributed accountability for facing and resolving mutual challenges,
- refusal to create human casualties among a few so that many are not inconvenienced,
- facilitation and protection of both organizational and individual health, and
- fostering learning at all levels.²²

Leadership succession, the challenge of letting go, moving on, and planning for one's own obsolescence, is the last challenge. Sustainable leadership is not achieved by charismatic

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leaders but rather spreads beyond individuals in chains of influence that connect the actions of leaders to their predecessors and successors.²³

Education Leadership Institutes

Given the information about leadership development and leadership programs, one of the more effective and popular approaches that higher education and health professions rely on to develop educational leaders are *leadership development institutes*. Some of the more prominent programs include Higher Education Resource Services Wellesley Institute (HERS), Harvard Institute for Higher Education, Executive Leadership in Academic Medicine (ELAM), Center for Creative Leadership, AAMC Institute for Senior Women in Medicine, AAMC Institute for Department Chairs and Associated Deans, Harvard Program on Conflict Resolution and Negotiation, and ADEA Leadership Development, and Leadership Education in Neurodevelopmental and Related Disabilities (LEND), etc. These programs have been successful and offer models that can be modified and customized to meet the needs of physical therapy.

In comparing our examination of the above literature with the results of the 2008 APTA Education Leadership Institute Survey, the data is rich with evidence of the need for leadership development in physical therapy education.

Purpose of the Needs Assessment

Given the information provided above, the ever-changing academic and health care environments, and the rapid evolution of our profession it is essential for the profession to urgently address current and future educational leadership needs. This evidence correlates with two specific goals of APTA's Education Strategic Plan, developed by education community stakeholders to address the issues of education leadership. These specific goals are:

- Goal 11: Develop leaders in physical therapy academic and clinical education and research with established roles and influence in prominent national and international agencies.
- Goal 5: Advocate for the physical therapy educational community in the context of social, governmental and regulatory practices and policies.

In response to the above goals and concerns raised by the education community (particularly with respect to the current faculty and potential program director shortage), a Consultant Group was formed. The aims of this group are to clarify further the current and future leadership needs within the education community and to identify strategies to respond to those needs. The consultant group represents individuals with diverse experiences, from varied academic environments (geographic, private/public, research intensive/teaching intensive), and different roles (program administrators, academic faculty members), including both PT and PTA stakeholders.

The Consultant Group first convened in November 2007 to review pertinent literature, available data, and leadership programs for other health professions faculty. Although needs were identified, additional information was required. Discussion turned to identifying the purpose, goals, needs, structure, potential educator expectations, challenges, and important collaborative relationships necessary for leadership development in physical therapy education.

In addition, the group identified certain assumptions to be considered in developing appropriate strategies to address identified needs. Strategies should:

- foster participation and input from the education community (both from within physical therapy and within the global education community at large).

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- support activities or offerings of APTA's Education Section.
- be sufficiently broad to allow individuals, regardless of their role, to benefit from leadership training.
- be visionary and address leadership throughout one's career in education.
- prepare physical therapy educators to be involved in strategic partnerships and alliances with internal and external stakeholders.
- prepare faculty to lead physical therapy education toward greater influence and leverage within higher education.

Based on the group's initial discussion, it was determined that a needs assessment would be beneficial for identifying the preferences of the physical therapy education community for structure and content of a leadership program. In spring 2008, a web-based survey was sent to all PT and PTA program directors (N= 447) with a request to share with their deans and PT and PTA academic faculty. In addition, the survey was sent to all PT and PTA ACCE/DCE, CAPTE Commissioners and Non-PT Site Visitors (N= 68), and clinical residency (N=38) and fellowship directors (N=21).

A review of the survey results supports the anecdotal evidence and the literature that there is a need for a leadership development program. It is also clear that the focus of this type of program would need to be expansive requiring the involvement of multiple existing content expert groups. We provide the survey summary below in an effort to create a framework for discussion about collaborative efforts to meet the leadership development needs of physical therapy educators.

Results of the Needs Assessment Survey on an Education Leadership Institute

Results are organized by the following sections

- Respondent demographics
- Needs assessment
- Participation or interest
- Preferred program structure and format
- Costs and institutional support

Demographics

Program directors, academic faculty, ACCEs/DCEs, clinical fellowship and residency directors/educators, and CAPTE commissioners and non-PT site visitors were invited to complete a web-based survey on the education leadership institute faculty needs assessment.

A total of 282 responses were received from 105 Program Directors, 94 Academic Faculty, 40 ACCE/DCE, 15 Clinical Residency Directors/Educators, 5 Clinical Fellowship Directors/Educators, and 14 other (not applicable). In aggregate, respondents to the survey represent 46 states/jurisdictions (71% female; 29% male). Age of respondents ranged from 20 to 69 years with a median age range from 50-59. The primary role of respondents was that of program director with faculty status of either assistant or associate professor. Respondents included physical therapists (90%), physical therapist assistants (6%) and other (4%). The majority of respondents teach in a physical therapist professional program (64%). Forty-four percent of respondents have been involved in academic education for 6-15 years with 31% of respondents have been in their current position for one to five years. Consistent with CAPTE data, survey respondents reported that 45% of PT program directors and 41% of PTA program directors are within the first 5 years of their current position. Forty-two percent of respondents

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have completed a PhD or equivalent degree. Fifty-six percent of respondents served in the role of program director or chair with an additional 21% of respondents stating they would consider serving in the role of program director or chair. Ninety-three percent of respondents have served as an academic faculty member with another three percent stating they would consider serving in the role of academic faculty. Sixty-five percent of respondents reported they never participated in a leadership development program.

Needs Assessment

The survey asked respondents to rate the importance of 55 skills/attributes associated with leadership and higher education to physical therapy educators using a Likert scale ranging from 1=Not at all important to 4=Very important.

The topic areas identified as “Important” to “Very Important” by $\geq 90\%$ of the respondents were:

- Advocacy (within and external to an organization)
- Building collaborative partnerships, alliances, and networks
- Business and financial management in education including alignment of faculty and financial resources
- Characteristics of effective leaders
- Communication styles and understanding how to influence
- Creating mentoring programs and relationships
- Curriculum design for a contemporary society*
- Facilitating academic excellence in faculty (teaching, service, and scholarship)
- Faculty identification and development (i.e., new, adjunct, and current)
- How to lead and facilitate change
- Identifying emerging opportunities and challenges
- Moving an organization from “good to great”
- Negotiation and conflict resolution
- Program evaluation and outcome measures
- Recruitment and retention*
- Quality improvement and accreditation
- Strategic planning and team building
- Strategic thinking and decision-making

*Identified by Program Directors Only

The topic areas identified as “Important” to “Very Important” by 75%-89.9% of the respondents were:

- Changing the culture of physical therapy within the academy
- Communication and media relations
- Creating mentoring programs and relationships
- Cultural competence in physical therapy education
- Curriculum design for a contemporary society*
- Delegation
- Developing policy and procedures
- Embracing evaluation
- Entrepreneurial thinking
- Finding balance in professional and personal life (stress, burnout, and renewal)
- Fundamental principles of human behavior associated with leadership development
- Higher education structure
- Interacting with the next generation of learners

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- Leadership (theory, application, assessment) versus management (theory, application, and assessment)
 - Leading meetings
 - Legal, ethical, and regulatory issues in higher education
 - Linking leadership development to physical therapy and higher education
 - Maintaining credibility
 - Managing faculty workload
 - Managing and taking risks
 - Motivational strategies
 - Organizational behavior and development/group dynamics
 - Partnership and collaboration
 - Perils and pitfalls in leadership
 - Public relations and marketing
 - Recruitment and retention*
 - Reflection and self-assessment
 - Technology in education
 - Walk the talk – modeling
- *Identified by the Aggregate Group Only

The topic areas identified as “Important” to “Very Important” by 50%-74.9% of the respondents were:

- Benefits and rewards of leadership
- Entrepreneurial thinking
- Fundraising
- Higher education structure
- Making your personal development active and functional
- Personal and interpersonal growth and development
- Succession planning
- Tapping into the right brain; thinking creatively
- Visionary and global thinking
- What is failure in academia?
- When to celebrate small successes

The topic areas identified as being “Important” to “Very Important” by <50% of the respondents were:

- Gender-based leadership issues
- Global environment

Preferred Program Structure and Format

Eighty-four percent of respondents indicated a desire for a blended curricular approach, incorporating both online and on-site educational experiences. Most respondents recommended a combination of synchronous and asynchronous online experiences. With regard to the on-site component, the majority of respondents chose two to four on-site sessions. Seventy-six percent of respondents selected three to five days as the optimal length of each session. Forty percent of respondents preferred that the onsite component of a leadership program be offered in conjunction with national APTA conferences; while 40% preferred separate onsite leadership experiences. Ninety-seven percent of respondents indicated a leadership program should be less than a year in length. When asked “what should be offered at the completion of the institute,” the majority of respondents selected continuing education units and a certificate of completion.

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Participation or Interest

Fifty-seven percent of respondents indicated that they would be interested in participating in an educational leadership institute if offered.

Costs and Institutional Support

Thirty-one percent of respondents indicated they might be interested in participating in a program with qualifying comments indicating cost, format and curriculum content would need to be defined before making that determination. Eighty-three percent of respondents reported that total costs of an educational leadership development program should range from \$500-\$2500, with many accepting shared responsibility for cost. Sixty percent of respondents indicated they were willing to share in the cost of a leadership program (25% individual; 50% institution; 25% APTA). Forty-seven percent of individuals indicated their academic program would be willing to share in the cost of the program with 47% of respondents indicating their academic program might be interested in covering a portion of the cost of the program after considerations of budget and cost, format and curriculum content.

Given the information that has been provided regarding evidence, literature, and data in support of a leadership development program, the following questions are raised as a springboard to begin our discussion.

Report authored by the Consultant Group on the Education Leadership Institute (Martha Ferretti, PT, MPH, FAPTA; Margaret Plack, PT, EdD; Katherine Biggs-Harris, PT, MS; Kerry Gilbert, PT, ScD, COMT; Becky McKnight, PT; Sharon Dunn, PT, PhD, OCS) and APTA Staff (Jody Gandy, PT, DPT, PhD; Ken Harwood, PT, PhD; CIE, Janet Crosier, PT, MS)

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Discussion Questions in Developing Curriculum

1. Are there additional questions that need to be posed or topics that need to be addressed to respond to the community's needs and to the contemporary literature?
2. How would you set priorities for curricular content?
3. Can these topics be categorized?
4. What strategies are available to respond to these needs?
5. How might we partner/collaborate and with whom would we partner to respond to the education community's need?
6. What resources are available to respond to these needs?
7. What outcomes would you like to see achieved?
8. What are the next steps and approaches to respond to these needs?

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Appendix A



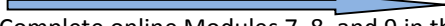
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Education Leadership Institute Flowchart

July	August	Sept	October	Nov	Dec	Jan	Feb	March	April	May	June	July	October
ELI Webinar Orientation (2 hours)													
 Complete online Modules 1, 2, and 3 in the APTA Learning Center (didactic)			1 st Onsite Session with Education Leadership Conference (ELC) (2 days - applied)										
	Mentor/Fellow Subgroup Calls (1-2 hrs)	Mentor/Fellow Subgroup Calls (1-2 hrs)	 Complete online Modules 4, 5, and 6 in the APTA Learning Center (didactic)					2 nd Onsite Session (2 days - applied)					
				Mentor/Fellow Subgroup Call (1-2 hrs)	Mentor/Fellow Subgroup Call (1-2 hrs)	Mentor/Fellow Subgroup Call (1-2 hrs)			M/F Subgroup Call (1-2 hrs)	M/F Subgroup Call (1-2 hrs)	Optional M/F subgroup Annual Conference		
								 Complete online Modules 7, 8, and 9 in the APTA Learning Center (didactic)			3 rd Onsite Session (2 days - applied)		
			ELI Application Process Call for Applicants			Application Review & Notification of Acceptance into ELI						ELI Webinar Orientation (2 hours)	Alumni Event at ELC
												1 st Onsite Session with ELC (2 days - applied)	

Summary of Changes to the ELI Fellowship Program (January - July 2016)

- Jody Frost retired from APTA and Libby Ross, director of academic services, assumed the ELI program director role and related responsibilities.
- Added a photo slide show that was played during graduation ceremony and featured pictures of fellows and mentors. <https://goo.gl/photos/QHer7zi6qMhKYxgDA>
- Reaccreditation Report – Managed all aspects of the ABPTRFE reaccreditation report and review process with assistance from ELI WG, VP, and EVP.
- 2016-17 Cohort – Decision was made by the ELI program director and work group to extend the ELI application deadline to March 1.
- ELI received the highest number of applicants (24) and enrolled a maximum class size of 18 for the first time in the programs history.
- New ELI contributors were identified:
 - ELI faculty members: Gail Jensen (Module 3) and Susan Hatfield (Module 8).
 - ELI mentor: Claire Peel to replace Becky Craik.
 - ELI Work Group member: Susie Deusinger to replace Margaret Plack.
- Online forms replaced paper forms
 - ELI mentorship assessment form. <https://fs3.formsite.com/apta/ELIAssessmentForm/index.html>
 - ELI application assessment form for applicants applying to 2016-17 cohort. <https://fs3.formsite.com/apta/ELIAppSurvey/index.html>
- New documentation was developed and shared with the new 2016-2017 cohort.
 - FAQ about the ELI required readings.
 - Instructions for fellows-in-training to upload their profile pics to the APTA Hub.
 - Orientation slides.

2012-2013 ELI FELLOWSHIP PROGRAM SUMMARY CHANGES

Opportunities are provided at the beginning of each onsite session for fellows-in-training to offer feedback about the ELI Fellowship program that we have tried to implement, where feasible. Below is a summary of changes that have been implemented in the ELI Fellowship Program since it began in 2011. Just as a point of reference, below are the ELI Core Philosophy, Mission, and Goals.

ELI CORE PHILOSOPHY

An Education Leadership Institute will...

- Prepare PT program directors and PTA program directors to meet contemporary education leadership needs through strategic and forward thinking and by leading change in higher education.
- Affect not only new program directors and new faculty in the profession, but may also include clinicians (eg, clinical residency and fellowship leadership) interested in pursuing academic leadership positions.
- Be sufficiently broad to allow participants, regardless of their role, to benefit from leadership training and likewise be flexible enough to meet the tailored objectives and needs of the participant to facilitate application of the concepts learned to their specific contextual environments.

ELI MISSION

The mission of the Education Leadership Institute (ELI) Fellowship is to develop innovative and influential leaders in physical therapy (physical therapist and physical therapist assistant) education who can function within a changing politico-socio-cultural environment. To achieve this mission the ELI Fellowship will be:

- Oriented toward leadership in the broadest context,
- Designed to meet contemporary education leadership needs with an eye toward the future,
- Provided across all levels of educators, not just program directors, including academic and clinician educators, and
- Targeted toward higher education culture.^{1 2}

ELI Goals

The Education Leadership Institute will develop core faculty members and program directors with the necessary leadership skills to:

- Facilitate change and improvement in the academic environment of the 21st century.
- Think strategically to creatively implement solutions in education to respond to changes in health care and society.
- Engage in public discourse that advances the physical therapy profession.

ELI Locations

- What has been successful?
 - Retreat format with opportunities to network formally during the session and informally in the evenings and morning (morning walks, evening bar, pool, hot tubs, fire pits, etc)
 - Rooms in close proximity
 - Bundled Packages for rooms, AV, extra night's stay
 - Great locations and ambiance!
 - Feeling pampered as mentors and fellows with great service and flexibility
 - Clean and updated locations with amenities
 - Within walking distance for the dinner to explore off the property
 - All commented how relaxing these settings were and conducive to sharing, learning, networking, honesty, and more!
- What are the downsides?
 - Retreat properties are not close to the airport and need to drive to get to them so there are additional costs.
 - Must go in the off season to get the best prices and negotiate well.
 - Food in these resorts is costly however the cost of food has gone up everywhere!

ELI Fellow Alumni Community

- ELI Fellow Grad Share Point Community
 - Opportunities for a networking breakfast at ELC
 - They organize their own dinners and events at CSM, annual conference (The NEXT)
- Are there more formal ways to provide for the ELI Fellow Alumni Community as well as current and past mentors and current and past ELI WG members?
- Any thoughts about how ELI Fellows could contribute back to the ELI Fellowship program such as a scholarship to assist those who pay out of pocket for onsite session costs?

Marketing and Promotion

There are a number of ways that the ELI Fellowship has been promoted and marketed in the past several years to include:

- Education Leadership Conference (ELC)
 - ELI Bookmark
 - ELI Fellowship Booklet available during ELC that summarizes all of the recent ELI Fellows' expectations, goals, and leadership projects
- ELI Website – redesigned last year

- New this year: U-Tube testimonials about the ELI Fellowship Program. These testimonials will run on the APTA banner in September prior to the Call for Applicants on October 1. Testimonials referenced on ABPTRFE Facebook page.
- List of current and past ELI Fellow graduates
- Annual promotion of new ELI Fellows in PTNews Now, Component Newsletter, ACAPT Education Section and PTA Educator SIG Newsletters, ABPTRFE Website and Facebook
- Direct email to all PT and PTA program directors and residency and fellowship directors (October, November)
- Anything else we should be doing?
 - Issue: How do we get more novice PTA program directors to apply?

ELI Fellowship Enrollees

- What's in a name? Formerly those enrolled in ELI were called participants and now they are called fellows-in-training. When they graduate they are then called ELI Fellows. This change occurred after ELI was officially recognized by ABPTRFE as a credentialed fellowship.

Curriculum

- Required Readings: Fellows-in-Training and mentors now receive one month in advance of the launch of the ELI Fellowship the list of required texts in preparation for the first 3 online modules. They also receive the list of required texts 3 weeks prior to the launch of modules 4-6 and modules 7-9 to be better prepared when these modules are available.
- Sequencing: The sequencing of the curriculum is in groups of 3 modules wherein each set of 3 modules, one of the modules is more work intensive in terms of the number of CEUs, number of sections in the module, assignments, readings, and complexity of the content. Thus, in the first 3 modules, Module 1 is foundational to the entire program and requires the most time to complete. For Modules 4-6, Module 5: Legal and Policy issues is the most intensive, and for Modules 7-9, Module 8: Program Development and Outcomes Assessment is most intensive. In the final set of modules, Module 7: Resources/Financial Management is probably the least familiar content and the one that most struggle with understanding and applying.
 - *Suggestion*: The recent graduates wondered if in the final grouping of modules, if Module 8 could be changed with Module 7 given that it takes longer to complete and assists with their leadership projects.
- Online Modules: Each faculty is provided with a new annual contract, Fellow-in-Training feedback about their online module for future revisions, post-test item analysis for those questions requiring revision, and all materials used for the current year to make their annual revisions. The Program Director makes all of the revisions to the required documentation and power points for consistency in formatting and to make it easier for the faculty to make these changes within the required deadlines.
 - Discussion Forum: For the upcoming year we will be requiring that fellows-in-training participate in at least one of the 3 synchronous faculty virtual sessions while they can

pose questions during the other sessions. This is to ensure participation by them as well as engaging with faculty in advance of the onsite webinar.

- *Suggestion:* One of the areas that requires revision is the technology being used for the Discussion forums as they are not fully engaging, do not allow for voice or picture, the system is cumbersome for responding to questions, and not as dynamic as it could be. Your assistance in exploring other alternatives such as Google Chat or other forum would be helpful. The new LMS system to launch May 2014 will be much better!
- Reminders: Initially fellows-in-training had the freedom to set their own pacing through the set of 3 modules. However, over time there were fewer comments in the discussion forum and fellows-in-training admitted falling behind. The current cohort suggested that the Program Director would provide announcements offering guidance as to where the fellow-in-training ought to be within a module to be on pace (eg, half way through now as the next module launches in 3 weeks). This was tested with the recent cohort for the final 3 modules, which seemed to work much better for everyone and also had more persons on the discussion forum during the faculty synchronous 2 hours.
- Faculty Webinars: Fellows-in-training are now required to provide a question for each of the modules prior to the Webinar to be posed during each onsite session. These questions are now shared with faculty in advance of the session as well as the fellows-in-training and the mentors. This has helped fellows-in-training become engaged in posing questions and the faculty webinar.
- Monthly Mentorship Subgroup Conference Calls: The program now has all 3 mentorship subgroups schedule a minimum of a monthly one-hour conference call (audio/visual) with their mentorship subgroup throughout the year. This has facilitated continued networking, provided a mechanism for ongoing discussion, clarifications, reminders regarding curriculum assignments, completion of assessments, etc.

Graduation

- ELI Fellows and mentors attend a graduation dinner ceremony following the completion of the 3rd onsite session where they receive from their mentors the following:
 - Certificate of completion
 - ELI Fellow pin
 - ELI Fellowship ribbon
- As a part of the ceremony, there is a letter from the APTA President recognizing the achievements of all involved in this program.
 - New this year: A shared letter from the Presidents/Chairs or ACAPT, Education Section, and PTA Educator SIG welcoming them as leaders into their respective education communities.
- Keynote speaker who addresses the ELI Fellows (Dr Beth Domholdt, Dr Lois Nora).
 - *Suggestion:* New for this year some of the ELI Fellows invited a guest to be a part of the ceremony and were recognized for their support of the Fellows throughout the year. The sentiment by the guests in attendance was that it was worthwhile! The fellows pay the cost of the dinner for their guests since this is not currently in the budget.

- Acknowledgement for retiring mentors with gifts
 - New this year we recognized the retiring mentors from ELI and gave them each a gift as a token of appreciation for their contributions to the program.

ABPTRFE Annual Report

- The ELI Fellowship is required to provide an annual report to ABPTRFE in January to ensure that we continue to meet the standards for credentialed fellowships. A prescribed format is required for the report where we need to modify our report somewhat to address what are still listed as predominately clinical fellowship criteria.
- Thankfully, the program has had no difficulty thus far in meeting the criteria.

ASSESSMENTS

- Review summary Appendix X: Assessment Strategies for ELI Fellowship Program Elements
- There are a number of assessments that are used throughout ELI as identified below. You will have an opportunity to review these data as a part of the curriculum and program assessment.
 - Admissions Survey (cohort 2 and 3)
 - ELI Onsite Assessment (x3)
 - ELI Mentorship Assessment (self, peer, mentor team, fellows-in-training) completed during each onsite session (x3)
 - Mentorship Log – Fellow-in-Training tracks their hours across a number of dimensions
 - ELI online modules (x9)
 - ELI posttest assessments (x9)
 - ELI Fellow New Graduate Program Assessment
 - ELI Fellow Supervisor New Graduate Program Assessment
 - 1, 3, 5 year ELI Fellow Program Assessment
 - 1, 3, 5 year Supervisor of the ELI Fellow Outcome Assessment
- *Modification:* We will need to modify the ELI module assessment since the mentorship log now captures all of the data on time required to complete the various items.
 - *Suggestion:* Add a section to comment on the resources/texts used and additional texts that should be added.
- *Suggestion:* Add two additional surveys to include:
 - Mentor assessment of the ELI Fellowship Program
 - Program Director assessment
- *Suggestion:* Share Program Outcomes with ELI Mentors
 - ELI Mentors and Faculty have an interest in knowing about the program outcomes as it relates to their mentorship and expert content.
 - *What can/should we provide to mentors and faculty for their contributors to ELI?*

2013-2014 ELI FELLOWSHIP PROGRAM COMPONENT SUMMARY CHANGES

Opportunities are provided at the beginning of each onsite session for fellows-in-training to offer feedback about the ELI Fellowship program that we have tried to implement, where feasible.

Additionally, this year we added two feedback focus groups from the ELI Mentors following the first and second ELI onsite sessions. Below is a comprehensive summary of changes that have been implemented in the ELI Fellowship Program since July 2013.

ELI Locations

- What has been successful?
 - Retreat format with opportunities to network formally during the session and informally in the evenings and morning (morning walks, evening bar, pool, hot tubs, fire pits, etc)
 - At Kiawah, all of the rooms were located in close proximity to one another to walk together to the session and connect afterward.
 - Bundled Packages for rooms, AV, extra night's stay for additional time to reflect, be with family (especially March if spring break and July summer holidays)
 - Great locations, relaxing, lots of light in the rooms, and ability to network as a group for formal and informal conversations¹
 - Feeling pampered as mentors and fellows with great service and flexibility by the hotels.
 - Clean and updated locations with excellent amenities.
 - Within walking distance for the dinner to explore the surrounding area off the property.
 - All commented how relaxing these settings were and conducive to sharing, learning, networking, honesty, and much more! Early morning walks/runs with members of the group has been a bonus as well!
 - The locations have had excellent service for the two-day sessions with all of the audiovisuals required and in a quiet secluded space.
- What are the downsides?
 - Retreat properties typically are not close to the airport. Everyone either needs to drive or use available transportation so there are additional costs for transportation and organization of rides. We make every effort to keep lodging costs down to offset transportation costs.
 - APTA takes care of the ELI Mentors and the Fellows are provided with information to access their transportation and connect for ride sharing.
 - Must go in the off season to negotiate the best prices at lower costs in resort locations.
 - Food in these resorts may be costly, depending upon the location, however the cost of food has gone up everywhere!

ELI Fellow Alumni Community

- ELI Fellow Grad Share Point Community

- Hosted first networking breakfast at ELC with an 80% attendance of all invites.
- ELI Fellows organize their own group dinners and events at CSM, The NEXT, and ELC

Questions

- Are there other formal and information ways to provide for the ELI Fellow Alumni Community as well as current and past mentors and current and past ELI WG members?
- Any thoughts about how ELI Fellows could contribute back to the ELI Fellowship program such as a scholarship to assist those who pay out of pocket for onsite session costs, mentor buddies, future ELI program mentors when ready, presentations, etc?

ELI Mentors

- Mentors are asked to serve for a one year period and then asked in January if they wish to continue for the new cohort, assuming that the mentorship assessments are positive.

Questions

- Is there a role for ELI Mentors after they no longer wish to serve in this capacity?
- Should there be a limit as to how long a mentor can serve in the program?

Marketing and Promotion

There are a number of ways that the ELI Fellowship has been promoted and marketed in the past several years to include:

- Education Leadership Conference (ELC)
 - ELI Bookmark
 - ELI Fellowship Booklet (2012, 2013, 2014) available during ELC that summarizes all of the recent ELI Fellows' expectations, goals, and leadership projects
- ELI Website
 - U-Tube testimonials about the ELI Fellowship Program. These testimonials ran on the APTA banner in September prior to the Call for Applicants on October 1. Testimonials referenced on ABPTRFE Facebook page.
 - List of current and past ELI Fellow graduates.
- Annual promotion of new ELI Fellows in PTNews Now, Component Newsletter, ACAPT Education Section and PTA Educator SIG Newsletters, ABPTRFE Website and Facebook
- Direct email to all PT and PTA program directors and residency and fellowship directors (September, October, November)

Question

- What other marketing, if any, should we be doing?
 - Revisit: How do we get more novice PTA program directors to apply?

Curriculum

- Required Readings: Providing required readings for each group of 3 modules one month in advance of the launch of has enabled fellows-in-training to be better prepared for the module launches and ready to go!
- Sequencing: 2014 ELI Fellows confirmed that the sequencing of the curriculum appears to work with one module typically requiring more work than the other two in terms of workload. All of the modules are definitely still relevant and used by the Fellows. They often refer back to other modules in their work as they progress through the program. Module 9 also has them reflect on lessons learned in Modules 1-8. In the final set of modules, Module 7: Resources/Financial Management is probably the least familiar content and the one that most struggle with understanding and applying and definitely recognize its value.
- Online Modules: Each faculty is provided with a new annual contract, Fellow-in-Training feedback about their online module for future revisions, post-test item analysis for those questions requiring revision, and all materials used for the current year to make their annual revisions. Faculty make revisions to all of their materials based on fellow-in-training and ELI Work Group recommendations. The Program Director edits all power points for consistency in formatting and to make it easier for the faculty to make these changes within the required deadlines.
 - Discussion Forum: This year we required that fellows-in-training participate in at least one of the 3 synchronous faculty virtual sessions and they could still post questions to be answered by faculty during the other sessions. There was far more interaction between Fellows as well as faculty during all of the module faculty hours this year.
 - We learned from one of the Faculty a great technique to further engage fellows by posing a question at the end of their responses for them to consider and respond to or asking them to connect with one of their colleagues in the dialogue. This faculty also posted questions to specific fellows-in-training that she had not yet heard from, which brought that person into the conversation.
 - We are passing along this technique to ALL of the ELI Faculty for 2014-2015.
 - Suggestion: APTA's new LMS will be launched later in 2014. Meanwhile the current Discussion Forum is still cumbersome however it tracks the written conversations for retrieval later.
 - Google Hangout System Requirements – Can take up to group hangout with up to 100 persons and only a maximum of 10 persons with video
 - Need Google Account and others must download Google as well
 - <https://support.google.com/plus/answer/1216376?hl=en>
- Reminders: Announcements were provided throughout the year to offer guidance as to where the fellow-in-training ought to be within a module to be on pace (eg, half way through now as the next module launches in 3 weeks). Although this worked better this year, fellows-in-training

still noted that they would fall behind at different times of the year and the notices let them know where they should be.

- **Faculty Webinars:** Fellows-in-training are now required to provide a question for each of the modules prior to the Webinar to be posed during each onsite session. These questions are now shared with faculty, fellows, and mentors in advance of the session. For the final ELI onsite session this year, all of the questions were grouped by theme and the person who posed the question was identified. Each fellow-in-training had an opportunity to select 2 questions that they wanted to pose during the session and came to the camera to ask the question directly of the faculty. Although faculty liked this approach, it was not a balanced posing of questions of faculty since this was based on the fellows-in-training interests.
- **Monthly Mentorship Subgroup Conference Calls:** The program now has all 3 mentorship subgroups schedule a minimum of a monthly one-hour conference call (audio/visual) with their mentorship subgroup throughout the year. It appears that if the group can see each other face-to-face early in the program that the networking occurs more quickly.

Graduation

- ELI Fellows and mentors attend a graduation dinner ceremony following the completion of the 3rd onsite session where they receive from their mentors the following:
 - Certificate of completion, ELI Fellow pin, ELI Fellowship ribbon to be worn at all APTA events (extras are provided onsite)
 - As a part of the ceremony, there is a letter from the APTA President recognizing the achievements of all involved in this program. There is also a shared letter from the Presidents of ACAPT, Education Section, and PTA Educator SIG welcoming them as leaders into their respective education communities.
- Keynote speaker who addresses the ELI Fellows (Dr Beth Domholdt, Dr Lois Nora, Martha Ferretti).
 - Guests were again invited this year to be a part of the ceremony and were recognized for their support of the Fellows throughout the year. The sentiment by the guests in attendance was that it was worthwhile! The fellows pay the cost of the dinner for their guests since this is not currently in the budget.

ABPTRFE Annual Report

- The ELI Fellowship is required to provide an annual report to ABPTRFE in January to ensure that we continue to meet the standards for credentialed fellowships. A prescribed format is required for the report where we need to modify our report somewhat to address what are still listed as predominately clinical fellowship criteria.
- Once again the program had no difficulty meeting the criteria!

ELI Application and Criteria

- We now have 4 years of application review scores from the ELI Fellowship WG to review to see how the application and matched criteria are working in the scoring process.

Questions:

- *Is the application sufficiently clear and are the applicants addressing the items that are needed to make decisions about the capabilities of the applicant?*
- *Are there any missing items in the application or aspects that are redundant?*
- *Are the criteria sufficiently clear to make decisions?*
- *Do the criteria adequately match the application process (ie, Is anything missing redundant, unclear, etc)?*
- *Is the scoring rubric clear to enable raters to be within 1 score of one another for the same impression/rating?*

Assessments

- There are a number of assessments that are used throughout ELI as identified below. You will have an opportunity to review these data as a part of the curriculum and program assessment.
 - Admissions Survey
 - ELI Onsite Assessment (x3)
 - ELI Mentorship Assessment (self, peer, mentor team, fellows-in-training) completed during each onsite session (x3) –
 - ELI Mentors commented on revising the assessment to include only two comments sections: 1) Strengths and 2) Areas for Growth. The rating scale would remain, however commenting by section is very redundant within the tool.
 - Mentorship Log – Fellow-in-Training tracks their hours across a number of dimensions and submit at the end of the ELI program.
 - ELI online modules (x9) – curriculum design.
 - ELI posttest assessments (x9) – required for CEUs, competency measure
 - ELI Fellow New Graduate Program Assessment – required for program assessment and ABPTRFE.
 - ELI Fellow Supervisor New Graduate Program Assessment
 - 1, 3, 5 year ELI Fellow Program Assessment
 - 1, 3, 5 year Supervisor of the ELI Fellow Outcome Assessment

Question

- *Do we need to survey ELI Supervisors at 3 and 5 year periods since some of the supervisors have changed since they graduated from ELI? Is this information relevant to still have this feedback after the new graduate and 1 year post ELI sessions?*
- *Are all of the assessments used still relevant and needed?*

2014-2015 ELI FELLOWSHIP PROGRAM COMPONENT SUMMARY CHANGES

Opportunities are provided at the beginning of each onsite session for fellows-in-training to offer feedback about the ELI Fellowship program that we have tried to implement, where feasible. There were 3 feedback focus groups from the ELI Mentors following each of the onsite sessions. Below is a summary of changes that have been implemented in the ELI Fellowship Program since July 2014.

ELI Locations

- What has been successful?
 - Retreat format with opportunities to network formally during the session and informally in the evenings and morning (morning walks, evening bar, pool, hot tubs, fire pits, etc)
 - Rooms have been located in close proximity to one another to walk together to the session and connect afterward.
 - Bundled Packages for rooms, AV, extra night's stay for additional time to reflect, WIFI, and an ability to include family members in March and July.
 - Great locations, relaxing, lots of light in the rooms, and ability to network as a group for formal and informal conversations. All commented how relaxing these settings were and conducive to sharing, learning, networking, honesty, and much more! Early morning walks/runs with members of the group in a safe environment has been a bonus as well!
 - Feeling pampered as mentors and fellows with great service and flexibility by the hotels.
 - Within walking distance for the dinner to explore the surrounding area off the property.
 - The locations have had excellent service for the two-day sessions with all of the audiovisuals required and in a quiet secluded space.
 - The retreat format has been excellent for the graduation event with outdoor possibilities, weather permitting.
 - We have been able to extend invitations to the ELI Fellows to bring a family member (at their cost) where we provide the per guest cost of the meal that they reimburse to APTA for the expense.
- What are the downsides?
 - Retreat properties are not close to the airport and have required an extended drive to and from the sites (Santa Rosa, Ca and Jekyll Island, GA). Everyone either needs to drive or use available transportation so there are additional costs for transportation and organization of rides. We make every effort to keep lodging costs down to offset transportation costs.
 - Must go in the off season to negotiate the best prices at lower costs in resort locations.

Question

1. *Should we set a limit as to how far a location can be from the airport so that we can communicate to Fellows-in-Training that the transportation will be no more than ___ hour from the airport?*

1. *1 hour from the airport*

ELI Fellow Alumni Community

1. ELI Fellow Grad Share Point Community
 - Networking breakfast in 2015 was very successful with an 82% attendance of all invites.
 - Grouped attendees by their mentorship group color so Fellows and mentors from different cohorts mingled along with the new fellows-in-training. Three questions were used to prompt discussion and many remained even after the session ended.
 - Requested more time for the 2015 networking breakfast and scheduled from 7:00 – 9:00 am for 2015.
 - ELI Fellows organize their own group dinners and events at CSM, The NEXT, and ELC.
 - ELI Fellows communicate through the HUB Community and Facebook.

Question/Suggestion

1. *A suggestion from the mentors for this year's breakfast is to enable a large group discussion about what their perceptions of the future of physical therapy education and what is needed to achieve that future? Any thoughts?*
 - 1. How do we as ELI Fellows become more involved in the future direction of physical therapy education leadership?**
 - 2. Share something that you have instituted in your program and how did you navigate this through a leadership approach?**
 3. Share the question in advance with all attendees to get their ideas onsite to get ideas without consensus. (large group)
Share references on leadership (new ones to be shared with the group?)

ELI Fellowship Consortia within ACAPT

- Membership requirements

ELI Mentors

- Mentors are asked to serve for a one year period and then asked in January if they wish to continue for the new cohort, assuming that the mentorship assessments are positive.
- All mentors from 2014-2015 chose to remain and are serving for 2015-2016.
 - Becky Craik has indicated that this will be her last year.
 - David Lake has been retired for several years and it may be time to seek his replacement.
 - Mike Emery has been with this program for an extended period. Does this warrant change since he too has retired?
- This year two of the mentor pairings switched partners to work with someone different just to learn from another mentor.

Questions

1. *Should there be a limit as to how long a mentor can serve in the program? Yes, 3 years*
2. *Are there conditions under which we might consider asking a mentor to retire from the program?*

Marketing and Promotion

There are a number of ways that the ELI Fellowship has been promoted and marketed in the past several years. The response to this year's Admission Survey is below and indicates that all methods are being accessed to learn about the ELI Fellowship program. This is the first time that the Academic Program Director has represented 25% of respondents, indicating support of members of ACAPT and PTA Educators SIG. The largest response is from a colleague ELI Fellow... our best program ambassadors.

Response	Frequency	Count
APTA Website	37.5%	6
ELI Fellowship Bookmark at the Education Leadership Conference (ELC)	25.0%	4
Academic Program Director	25.0%	4
From a colleague	62.5%	10
From a supervisor	18.8%	3
Other (please specify)	18.8%	3

Question

1. *Based on the above data from this year's cohort, is there anything we should change in promoting the ELI Fellowship Program?*
2. *Based on the Admissions Aggregate Survey responses, are there changes needed in the application process?*

- ***Provide Informz blast email for direct call about ELI Fellowship to all PT and PTA program directors and residency and fellowship program directors***

Curriculum and Communications

1. Online Modules: Each faculty is provided with a new annual contract, Fellow-in-Training feedback about their online module for future revisions, post-test item analysis, and all materials used for the current year to make their annual revisions.
 - Faculty make revisions to all of their materials based on fellow-in-training and ELI Work Group recommendations. The Program Director edits all power points for consistency in formatting and to make it easier for the faculty to make these changes within the required deadlines.

- This year faculty scheduled at least one or more Adobe Webx Webinars for one of their recorded Discussion Forums. This has been a vast improvement in the communication and engagement of faculty and fellow ELI colleagues.
 - We have worked with Courtney Merritt to schedule an Adobe Webx training for each of the faculty to familiarize themselves with this system.
 - Discussions on the Discussion Forum also increased significantly this year with expectations set that they will engage with their fellow colleagues as well as the faculty. This cohort seemed to keep up with their readings and assignments much better than previous cohorts using the HUB Community. The calendar provides information about the launch of new modules, dates for discussion forums/webinars, and other important dates.
2. Faculty Webinars: Fellows-in-training are required to provide a question for each of the modules prior to the Webinar to be posed during each onsite session. These questions are shared with faculty, fellows, and mentors in advance of the session. For all ELI onsite sessions this year, questions were grouped by theme and the fellow-in-training who posed the question was identified. Each fellow-in-training selected at least one high priority question they posed during the session on webcam.
 3. Monthly Mentorship Subgroup Conference Calls: A minimum of one monthly mentorship subgroup conference call is scheduled for one-hour with their mentorship subgroup throughout the year. All of the groups are working to use an audio and visual method for the meeting. The webinars with faculty also help fellows-in-training to feel more comfortable with one another during the onsite sessions.

Questions

1. *Note: APTA's new LMS will be launched between August 6 and September 6. We need to obtain feedback from users regarding this new system and additional training will be needed to the new APTA LMS for Mentors, Fellows-in-Training, and faculty.*
2. ***Should we change all monthly conference calls to require, at least early in the program, both audio and visual components? APTA can host the calls but does not provide Adobe WebX to mentors as they use their own resources (Google Hangout, Skype, Fuze, etc).***

Graduation

- ELI Fellows, mentors, and guest attend a graduation dinner ceremony following the completion of the 3rd onsite session where they receive from their mentors the following:
 - Certificate of completion, ELI Fellow pin, ELI Fellowship ribbon to be worn at all APTA events (extras are provided onsite).
 - Fellows pay the cost of the dinner for their guests since this is not budgeted.
 - ELI Faculty that may live near where the 3rd onsite session is held are also invited to join the graduation ceremony. This year Robert Mundhenk attended in California!
- As a part of the ceremony, APTA's President provides a letter recognizing the achievements of all involved in this program. There is also a shared letter from the Presidents of ACAPT,

Education Section, and PTA Educator SIG welcoming them as leaders into their respective education communities.

- Keynote speaker who addresses the ELI Fellows (Dr Beth Domholdt, Dr Lois Nora, Martha Ferretti, and Dr Sharon Dunn).

Question

1. *Is there anything else that should be included in this graduation ceremony?*

ABPTRFE Annual Report

- The ELI Fellowship is required to provide an annual report to ABPTRFE by January 31st to ensure that we continue to meet the standards for accreditation. A prescribed format is required for the report that has been revised for 2016. The ELI Fellowship was approved without changes.
- In 2016, the ELI Fellowship is due for re-accreditation with documentation required for submission between March and July 2016. A new format will be provided for this renewal along with budget implications.

ELI Application and Criteria

- For the 2015-2016 application cycle a \$50.00 application fee was instituted without difficulties. This was added given that RF-PTCAS charges a fee for their application process and there are administrative costs in processing applications for the ELI Fellowship. There were no comments provided regarding this fee.
- Modifications were made to the Evaluative Review Criteria Rubric to enhance clarity as well as provide for better matching between the application and the criteria used to assess applications.

Questions/Suggestions

1. *Considering the discussion from last year regarding applicants' advanced degrees, we need a discussion clarifying for the 2016-2017 cohort, whether or not we need to specify advanced doctoral degree status for applicants in an academic setting given changes in CAPTE's criteria beginning in 2016?*
2. *Is a PT program director from a foreign-educated program who has international partner APTA membership status eligible for the ELI Fellowship Program?*
3. *We need to clarify the practice experience item and its relevance in the application or is this specific to someone applying as a program director for a residency/fellowship program?*

Assessments

- There are a number of assessments that are used throughout ELI as identified below. You will have an opportunity to review these data as a part of the curriculum and program assessment.
 - Admissions Survey 2015
 - Three ELI Onsite Assessments 2014-2015

- Mentorship Log – Fellow-in-Training tracks their hours across a number of dimensions and submit at the end of the ELI program in support of accreditation process.
- Mentorship Assessments – These are reviewed by the Program Director to determine if any follow up of mentors is required.
- ELI online modules (x9) – curriculum design (2014-2015)
- ELI posttest assessments (x9) – required for CEUs, competency measure
- ELI Fellow New Graduate Program Assessment – required for program assessment and ABPTRFE.
- ELI Fellow Supervisor New Graduate Program Assessment
- 1 year ELI Fellow Program Assessment
- 1 year Supervisor of the ELI Fellow Outcome Assessment

Question/Suggestions

1. *Are we getting the data we need about the program to make curricular decisions and to determine if the program is meeting its desired outcomes?*
 - *If no, do need to review all of the assessment to determine if further changes/revisions are warranted?*
2. *Should we send a brief questionnaire that essentially asks: “What are you doing now?” Yes find out stories from grads and their supervisors!*
 - **Professionally new**
 - **Academically**

ELI Minutes

January 19, 2012

Modules 4 and 5 Impressions

- Module 5 – broaden understanding of student affairs; go back to the institutions, enter journals; how to use student affairs; high risk issues for student affairs (more in depth)
- Module 6 – case based excellent; rigorous; set the tone well

Video chat in December and January for a group

Mentor comfort in the small groups

Build in videoconferencing with mentors

Set dates for when we would meet by conference call

Provide list of texts in advance and background reading for Bolman and Deal

2012 Applications Review

Revisit the application for specific language

- Issue or need for the leadership project language (engage with Dean/administrator)
- Target Size = 18 (3 subgroups of min 4 to max 6 participants)
- Leadership Development as programs directors
- Long term sustainability to meet the needs of program directors

Class of 17 for Cohort 2012

Acceptances

Strongest

1. Ed Barakatt
2. Mary Blackinton
3. Aliya Chaudry
4. Nannette Hyland
5. Deanna Lamb
6. Merrill Landers
7. Ellen Lowe
8. Tina Recalde
9. Chris Sebelski
 - a. Letter incomprehensible in places
 - b. Two other training programs if ELI will be a priority for her
 - c. Leading a residency program (leadership application)
 - i. Upwardly mobile person; helped through accreditation
10. Doreen Stiskal
11. Michelle Unterberg
 - a. Nomination letter odd and not well written
 - b. Nominee letter in the 2nd page; phraseology
 - c. Quiet leadership
12. Lori Watson

Bit Weaker, But Still Good Candidates

Susan Cotterman

- gaps in letter of intent
- ready for something beyond a program director to a dean of allied health
- advancement to next administration level
- marketing to prepare future leaders

Charlene Jensen** (NO)

- gaps in letter of intent
- narrow academic experience as a PTA program director
- Finish DPT in August
- Develop teaching skills and finish tDPT
- Faculty development workshop – Education Section of APTA and Ithaca; you have identified as a priority
- Consider in the future reapplying to the program
- Little Soon!!

Tim Noteboom

- gaps in letter of intent
- Program director for postprofessional degree programs
- Residency and Fellowship and postprofessional degree programs

Candidates About Whom I'm Not Sure

Anita Santasier

- not sure of career goals about being a program director
- cannot be a program director there and cannot move
- possesses PhD degree
- changes to be achieved within the academic program

Tiffany Idlewine

- not sure of goals
- not sure of wisdom of two from the same program
- new ACCE and in a developing program
- inexperience in higher education
- not a good fit
- two applicants from the same program
- Faculty Development Program; ACCE/DCE Training Clinical Education SIG
- Mentors in DCE
- Reapply and supportive letter

Chicago for 3rd Onsite

- Shared Leadership Strategies for 2012**
 - Leadership Assignments
 - Target the scholarship for ELI with criteria for acceptance (needs of the section to support for an activity) – Academic Council and Education Section limited; program at ELI; part of a panel discussion for ELC and ELI)
 - Academic council task force members from ELI participants
 - Concerns about asking ELI participants to provide impressions while still developing in the program

- How are we promoting the APTA within ELI
- **Consider sponsoring fellows registration/costs to ELC!!**
- **Alumni list for task forces for Academic Council**
 - ELI “partner” program with previous cohort
 - Orientation to APTA ELI, Academic Council, and PTA SIG, and Faculty SIG (July Webinar Resource – Mission, Vision, Membership Constituents, ELC)
 - Marketing for ELI tools (ribbons) ELI
- Resource List of former graduates – “buddy question worthwhile?”
- Alumni Reception at ELC and invite cohorts together – Post Fellow as an alumni

Program Content Online Modules

- Limited Access to faculty teaching the module
- Use of online technology through the learning center
- Summary sheet
- Discussion Forum
- Learning Center layout
- Virtual Faculty hours

Assessment of Coursework (cohort #2)

- Review module assessment instrument – content and its delivery and application
- Provide 3 course assessments prior to each onsite session with a deadline
- Encourage the completion of the post course assessments
- CEU function assessment

Get group together prior to first onsite session by audio or video conference

Differentiate role between content faculty and Mentors

Face-to-Face format for how to navigate the Share Point and Learning Center (discussion Board and subscribe and unsubscribe) – Webinars set up!

Clarify project

Clarify faculty and mentor roles

Small groups between Orientation Webinar and first face-to-face

Leadership Projects earlier

Mentors

- Ask mentors to scan mentor assessment to sent to Program coordinator as an assessment.
- Program assessment component.
- Ask mentors if they wish to remain as a mentor for another year and if you are the term of mentoring is for 2 or 3 years?
- Consider 2 PTA program mentors
- Keep the mix of participants by geographic area, type of institution, PT/PTA
- Future rotate 3 in and 3 out as mentors in the future
- Criteria that mentors not in leadership roles in other association responsibilities as a conflict of interest

July Orientation (3 hour session) -

- Talk about the role of mentor, content expert faculty
- Share point set alerts
- Discussion forum and format for all online courses
- Subgroups spend time to talk
- Schedule for first three modules and when convene
- Agenda – operational and organizational and conference calls/Webinars for 3 months

Edits to meeting agendas - email

Case vignette review by email

July Webinar (after first cohort has last onsite)

- Doodle – preference after July onsite session

Conference Call prior to 2nd onsite

- February 29 2:30 – 3:00 PM EST

Conference call (1.5 hours) Prior to Webinar

June 27, 2012 10:00 – 11:30 EST

- July Webinar – edit and additional hour structure
- 3rd onsite session – edits (Based on 2nd onsite)
- Year end assessments
- ABPTRFE visit

August 8-10, 2012 Meeting

- Annual review of the program
- 1st onsite
- ABPTRFE
- Two new persons on ELI Workgroup (external person to serve on this community)
- Higher education leadership development from an external perspective; involved in leadership development program (sustainability and assessment)
- Mentor person representative
- Susan – either mentor or ELI WG for 2012
- Mike E – either role as mentor or ELI WG (not both)
- Margaret – mentor or ELI WG
- Academic Council – request program chair (not on the board for ELI WG)
- Marti – open either way
- Mike P – Mentoring and ELI WG either way

**Education Leadership Institute Committee
Meeting Minutes
March 1-2, 2011**

July 2011 Participant/Mentor/ELI Committee/APTA Staff Orientation Webinar

- ❖ Information to be conveyed through Share Point Community regarding the Orientation posted in advance of the Webinar
 - Use of a dedicated Share Point Community for ELI
 - ELI Program Community – mentors, participants, ELI Committee, APTA staff
 - ELI Subgroup assignments for mentors and participants (3 communities)
 - Features of the Share Point Community (calendar, discussion board, references, shared documents, links, announcements)
 - Setting alerts
 - Items to be posted to ELI Community as Orientation Webinar Resources
 - Worksheet with technology specifications and resources required for ELI throughout the year (eg, computer, web browser, webcam, high speed Internet, etc)
 - Ground rules for level of acceptable participation
 - Holding participants accountable for those ground rules
 - Who are the participants?
 - Summary demographics of participants – Who are you as a group?
 - Participants share something personal about themselves? their family? Professional roles? Hobbies?
 - Calendar of events (orientation, on-site courses, ELC, online module availability, call for 2012 applicants, etc)

- ❖ Provide a project to navigate APTA Learning Center in advance of the session
 - Provide participants with a module to access and tour to learn fundamental functions

- ❖ Information about the Online modules
 - Names of faculty teaching online modules
 - Interaction with faculty during the online modules
 - Availability of faculty during the online modules, with specific times identified by the faculty as to their availability
 - ◆ Provides an asynchronous discussion board where participants can interact throughout the online course
 - ◆ Participants expected to lead their discussions
 - ◆ Faculty will identify specific times when they will be available for Q & A/consultation when module completion is expected (perhaps this is one time per month or toward the end of the module?)
 - ◆ Stagger the openings of each module
 - Faculty availability during the On-site program
 - ◆ Faculty teaching Modules 1, 2, and 3 will available for the first few hours using telecommunications for Q & A, updates, etc.
 - Participant-Mentor Interactions
 - Availability of Mentor-Participant subgroup interactions using the subgroup discussion board in Share Point Community
 - Participants-Mentors share additional resources
 - Assessment Components Throughout ELI
 - ◆ As the charter class, we need to ensure that we capture ELI data that encompasses the waterfront knowing that we can refine these tools in the future.

**Education Leadership Institute Committee
Meeting Minutes
March 1-2, 2011**

- ◆ Trying not to make an unreasonable burden and need your assistance to complete these assessments as well as assist us in streamlining them for the future
- ❖ Expectations of faculty, mentors, and participants, ELI Committee, and APTA Staff
 - Future role models and educational leaders
 - Active participants
 - Networking
- ❖ Information on On-Site Modules
 - First on-site session October 4-5, 2011 in Tampa, Florida a Sheraton Sand Key Hotel <http://www.sheratonsandkey.com/>
 - Agenda provided in advance for each session
 - Solicit dates in March 2012 and July 2012 not available to set up on-site modules 2 and 3
- ❖ Leadership Projects for their Academic Institution
- ❖ Leadership Development Plan
- ❖ Reflective Questions To Be Discussed During the Webinar (Answer within 2 minutes)
 1. What is your greatest challenge in your current position (or leadership experiences)?
 2. What is your greatest reward in your current position (or leadership experiences)?
 3. Just in case...What are you hoping to achieve as a result of participating in ELI? (may need to facilitate from their applications?)

Prior to the Webinar

- ❖ Eli Committee members will review the information provided on the ELI Program Share Point Community to check its contents
- ❖ Mentors also should review the content and test the system

ELI Committee's Role in ELI and Orientation Webinar

- ELI Committee members can view the online modules
- ELI Committee members attend the Webinar (ie, Marti, Susan N, Margaret)

Webinar Agenda: July 18, 2011; 12:00 – 2:00 pm EDT

12:00 pm	Welcome and Introductions of ELI Committee, Mentors, Moderator, APTA staff	Jody
12:05 pm	Fun Introductions for Participants	Margaret
12:25 pm	Assumptions About ELI <ul style="list-style-type: none"> ▪ Covenant – confidentiality, active participant, attend all onsite and online sessions, assessments, honest feedback) ▪ Report out 2012 dates for the March and July/August ▪ on-site meetings 	Jody
12:32 pm	Participants share their thoughts about 2 reflective questions previously posed on the ELI Share Point Community <ul style="list-style-type: none"> ▪ What is your greatest challenge in your current position 	Mike E/Mike P

**Education Leadership Institute Committee
Meeting Minutes
March 1-2, 2011**

	(or leadership experiences)? (30 mins)	
	<ul style="list-style-type: none"> ▪ What is your greatest reward in your current position (or leadership experiences)? (30 mins) ▪ Just in case...What are you hoping to achieve as a result of participating in ELI? (may need to facilitate from their applications?) 	
1:30 pm	Open time for Questions and Answers related to ELI <ul style="list-style-type: none"> ▪ Share Point Community, Logistics, APTA Learning Center, etc) 	Moderator/All
1:50 pm	Mentor- Participant Subgroup Charges <ul style="list-style-type: none"> ▪ Each Mentor team provides direction to the participants about their subgroups Share Point community directing them to specific resource information ▪ Mentors have the participants set their subgroup alerts! 	
1:54 pm	Inspirational closing remarks to participants!	Scott Ward
2:00 pm	Adjournment	

❖ **Issues Related to Faculty and Online Modules**

- Faculty provide questions with assigned readings to enable students to know what to focus on with the readings
- Open Module 1 first for a few weeks prior to opening Module 2 and 3
- Formatting for ELI Assessments
 - Use of more consistent rating scales that can be scored for research purposes easily with defined fields
 - Qualitative comments for further and secondary analysis
 - Two types of assessment questions: process and outcome assessments

Components of the Personal Professional Development Plan (On-Site Sessions)

- ❖ Timeframe for participant Professional Development Plan: 3-5 years
- ❖ Relationship to self-assessment components (Beth's assessments: strengths, areas for growth)
- ❖ Develop Goals
 - SMART – specific, measurable, achievable, realistic/relevant, time specific
- ❖ Action Plan – Action strategies, Persons Responsible, Resources needed
- ❖ Anticipated Challenges
- ❖ Share the updated professional development plan with mentors and/or participants during on-site sessions in October, March, July
- ❖ Mentors discuss the participant's professional leadership development plan to assist participants in identifying unique resources; including connections with their Deans/Supervisor

Send e-mail and written correspondence to the Leadership of ACAPT, PTA SIG, and Education Section and associated APTA Staff (Leslie Portney, Peggy Gleason, Becky McKnight – Lisa R, Lisa M, Ken)

- ❖ Correspondence Contents
 - Provide a brief update on the status of ELI for all of the groups
 - Provide suggestions for how members of ACAPT, PTA SIG, and Education Section can be involved in ELI
 1. Provide time to engage in activities in the fall with ELC; Building ELI with ELC

**Education Leadership Institute Committee
Meeting Minutes
March 1-2, 2011**

2. Provide a reception prior to ACAPT meeting with ELC for the alumni to be celebrated with their leadership projects on display
 - a. Welcome ELI grads into ACAPT and support them with program directors in attendance
3. Suggest names for mentors for the future (ACAPT, Education Section, and PTA SIG)
 - a. Provide criteria that ELI is seeking in mentors; open to suggestions
 - b. Invite these groups to make recommendations and offer input about suggestions regarding criteria
4. Create case vignettes for ELI on-site sessions
 - a. Individuals or groups interested in providing case vignettes that integrate concepts from several modules are welcome – Now!
5. ELI Committee provides an Annual Report on ELI for ACAPT/Education Section/PTA SIG Business Meetings
 - a. Promote awareness about ELI
 - b. Share program findings and outcomes
 - c. Formal update provided during the meeting sessions
6. Promote ELI through a variety of mechanisms and interactions with ELI graduates in any forum
7. Financially support the registration fee for each cohort of ELI graduates for the ELC, beginning in 2012
8. Welcome new Education Leadership Institute Graduates through available formal processes

Important Dates for 2011 including Conference Calls and Meetings (March – August)

- ❖ April 10, 2011
 - Provide draft information for Orientation Webinar to ELI Committee for review
- ❖ **CONFERENCE CALL:** April 12, 2011; 4:30 – 5:30 pm EDT
 - ELI Committee members revise and sign off on all assessments during the conference call on (BD Need Lois)
- ❖ April 15, 2011 – May 9, 2011
 - Send assessments to Sharon McDade for review –
- ❖ **CONFERENCE CALL:** May 18, 2011; 4:30-5:30 pm EDT
 - Committee to make edits/changes from recommendations from Sharon McDade (check LN)
- ❖ May 30, 2011
 - APTA Staff format Assessments with logo
 - Determine how data will be entered into an Access database
- ❖ Post Orientation Webinar Pre-Information and Final agenda on ELI Program Community (July 10, 2011)
- ❖ **July 18, 2011; 12:00 – 2:00 pm ELI Orientation Webinar**
- ❖ **ONSITE APTA MEETING:** August 22-23, 2011
 - Agenda: October Onsite Session of ELI Program – Agenda, Case vignettes, discussion questions, etc
 - Marketing for 2012 applicants – 2nd cohort for ELI
 - Assessments completed to date in ELI; Assessments to be completed and any revisions
- ❖ First On-Site ELI Session: October 4-5, 2011
 - Tampa, FL; Sheraton Sand Key Hotel

Set-Up Mentor Conference Call: 1.5 hour session

- ❖ Request meeting time with mentors to convene a conference call in March. Possible dates and times below:

**Education Leadership Institute Committee
Meeting Minutes
March 1-2, 2011**

- March 21st – > 4:30 pm EST
- March 22nd – 9:00 – 1:00 pm EST
- March 23rd – 10-1:00; 3:00 – 5:00 EST
- March 25th – 8:30 – 12:00 PM **EST (8:30 -9:45 AM EST)**
- ❖ Send the Mentorship Manual to the mentors in advance of the call
- ❖ Provide access to online modules with participants (will not take the courses)
- ❖ Discussion items:
 - Role of mentors and interactions with session faculty in online modules and onsite sessions
 - How mentors will be assessed as related to the Mentorship Manual
 - How mentors will interact with participants – Share Point Community (1 ELI Program Community, 3 ELI Subgroups (orange, blue, green))
 - How mentors will work with participants on their professional development plan
 - How mentors will support participants on their Leadership Project and how the academic institution dean/supervisor will be engaged
- ❖ Confirm 1st on-site session required of mentors: October 4-5, 2010
 - Sheraton Sand Key in Tampa, FL
 - APTA pays for the mentors travel, hotel, and food (Program 60 budget)
 - We will notify them when they can make their travel reservations online through Concur and hotel rooms
- ❖ Mentor communications will occur through email
 - Provide mentors with applicants goals narrative statements (confidential)

SUMMARY OF ASSESSMENTS

- ❖ Committee members discussed each of the assessments that they were developing and obtained group feedback for revisions and additions
 - Several of the assessments will be merged together
 - Faculty questions to be included in online modules and on-site modules
 - Mentors will have a separate assessment
- ❖ Module 1 Assessments (BD) – Embedded within the module
 - Bolman and Deal Assessment (Excel) to be integrated in Module 1
 - Participant Self-Assessment
 - Assessment of the Participant from Others
 - Dr Lynn Gangone – Discuss with faculty if we need to purchase a 360-degree leadership assessment instrument beyond the Bolman and Deal form? (talk with Lynn)
- ❖ Online Module/Faculty Assessment (Merge items from Marti and Lois into one tool)
 - Provide the online module assessment at the end of each module (x9)
 - These will be incorporated in the APTA Learning Center by Professional Development
- ❖ On-site Course Session Assessment (Merge Marti and Lois items plus new questions specific to the agenda)
 - Provide the on-site course assessment after each on-site component (x3)
 - Add items that address specific components of the 2-day onsite agenda
 - Need to include assessment questions related to the 2-day agenda including mentors leading components of the onsite program (eg, inspirational opening, case vignettes, leadership development plan, leadership project, mentoring sessions, small group work activities), faculty updates and Q & A.
 - Need questions about location, meeting logistics, costs, etc.

**Education Leadership Institute Committee
Meeting Minutes
March 1-2, 2011**

- ❖ Mentorship Assessment (ME, MP)
 - Provide at the end of every face-to-face session (x3)
- ❖ Survey about the ELI Application Process (SRN)
 - Only at the end of the first face-to-face session (x1)
- ❖ Dean/Supervisor Assessment (MP)
 - Graduation
 - 1 year out
- ❖ Participant Assessments (MP)
 - Graduation
 - 1 year out
 - 3 years
- ❖ Questions for Focus Groups (ACAPT, PTA SIG, Education Section)
 - Every two years run a focus group (2013 first focus group for two cohorts)
- ❖ Define Database Items Desired (culled from the database)
- ❖ Assessment Grid: Summary Overall Program Assessment Elements (SRN)
 - Complete the overall assessment grid using all of the components that have been developed and update to include in the one summary document

**Education Leadership Institute Fellowship Work Group
Conference Call Minutes
May 21, 2013**

Attendance: Mary Dockter, Patricia Draves, Martha Ferretti, Margaret Plack, Carol Plisner, and Mark Reinking

Guest: Mike Pagliarulo

Discussion

Reviewed and revised the ELI Orientation Agenda for the conference call and webinar on July 15, 2013. See revised agenda attachment.

- Orientation Webinar planning on participating – Pat, Marti, Carol P, Margaret (?)

Share Point Community

- Add a new assignment for the fellows-in-training prior to the orientation to share on the Share Point Discussion Board for the ELI Program 2013-2014 one personal thing about themselves to introduce themselves to the group. This will help to get the ball rolling for introductions during the first part of the orientation with the mentorship subgroups.

August 14-16, 2013 ELI WG Meeting

- Reminder to review the Mentorship Guide to include changes in the roles and expectations of mentors based on what we have learned these past two years.
 - Pair mentors as experienced and new mentors for support and continuity from what has been learned in the past.
 - Mentors will need to assist fellows-in-training in staying on target in completing the online modules
 - Follow up to assure that assessments are being completed on time
 - Encourage fellows-in-training to post their questions on the Learning Center Discussion board for faculty to respond during their virtual office hours
- Review Assessments (onsite and program) to see if any revisions are needed that could inform the ELI program, faculty, or mentors.

Response to Questions

- Discuss whether the aggregate data that is provided by the new fellow graduate and their respective supervisor that is shared with the Work Group as a part of curriculum assessment in August is appropriate to share with involved ELI Mentors. Considerations include any issues of confidentiality in sharing this information beyond the WG or how the information could be reported?
 - Important to be transparent about ELI with aggregate data collected over a few years in how well the program is meeting its mission, vision, and goals.
 - While the need to be transparent is important, the fellowship program does need to protect its mentors, faculty, and fellows.

- Create a summary report about the ELI Fellowship Program outcomes in an aggregate report
- The outcomes from the ELI Onsite Assessments aggregate report from fellows-in-training can be shared with the ELI mentors after each onsite session once completed. This assessment uses a Likert scale for each of the items with summary comments provided at the end.
- Mentors may share areas of concern with the Program director that needs to be captured through changes in the program, in the assessments, or in the Mentorship Manual for future mentors.
- ELI WG can develop a brief summary report annually to be shared with stakeholders of interest (ie, mentors, faculty, and leadership of the Academic Council, PTA Educator SIG, Education Section, and APTA Board of Directors.)
 - Need to de-identify data and any specific individual interactions or comments in the openly shared report
- A new centralized application service for residencies and fellowships (RF-CAS) has been developed and is launching this fall (September 16, 2013). All of the residencies and fellowships have been involved in various phases of its development by providing feedback about their specific application processes, documentation, fees, and tuition. We need to discuss if ELI should be included in the RF-CAS this fall when it launches. There are pros and cons to being involved and we can discuss these and make a decision about whether we should opt in or opt out for 2013.
 - The group discussed the pros and cons and Mary shared her role on the PTCAS and Web Admit.
 - Although there are benefits in using RF-CAS, for 2013-2014 the WG has elected to opt out and will reassess again in 2014
 - Jody to follow up with Kendra regarding the ELI Fellowship WG's decision for RF-CAS for 2013.

**ELI Fellowship Work Group Conference Call Minutes
November 12, 2014; 3:00 – 4:00 pm ET**

Status Program Updates (2014-2015)

1. ELI Applications
 - a. 4 applications received as of 11/12/14; will post these applications and others as they are submitted for Work Group members to review using the revised Criteria Worksheet on THE HUB.
 - b. Marketing and promotion efforts for ELI this year included poster at a table at ELC with bookmarks and ELI graduate summary booklet, direct promotion of ELI during CAPTE self-study PT/PTA program workshops, ACAPT, Education Section, Clinical Education SIG, PTA Education SIG, and Faculty SIG newsletters or list serves, direct email and reminders to PT/PTA Program directors and Residency & Fellowship directors, Residency and Fellowship Facebook, Component News, PTNews Now, and APTA Website and rotating Marquis banner (opening call and deadline for the call)
 - c. Website changes made to include updating CEUs, updating Work Group members, adding \$50 application fee, application changes, etc.
 - d. Speakers for ELI Graduation and 1st Onsite Session 2015 confirmed
 - i. Sharon Dunn – graduation
 - ii. Stephanie Kelly – 1st ELI Onsite in Baltimore

Feedback from ELI Fellows and Mentors First Onsite Session (October 29/14)

1. a more interactive Discussion Forum method – Tested Adobe Webx with Polly Moss/Module 4 on 11/12/14
2. ELI Mentors suggested developing a set of case vignettes/role plays for ELI that could be used in addition to/lieu of those already developed depending upon the needs of the group. (identify topics for cases and role plays)
3. Recently revised mentorship assessment is much improved; less time to complete, no redundancy in comments and narrative comments are more substantive.

Second ELI Onsite Session - March 2015 in Jekyll Island, GA

1. Review/Revise Agenda for 2nd ELI Onsite Session – no changes
2. Review/Revise Case Vignettes – no changes
3. Review/Revise Role Play Situation – no changes

Work Group Member Replacement for Mary Dockter

1. Considerations - more recent graduate who is familiar with the current ELI program given changes from the first cohort; 3 year term
 - o Denise Bender (2011)
 - o Diane Heislein (2011)
 - o Jill Horbacewicz (2011)
 - o Merrill Landers (2013) - 1st choice
 - o Anita Santasier (2014) – 2nd Choice
 - o For those ELI Fellows not selected see if they will review the cases/role plays that are developed by the ELI Fellowship WG and provide feedback?

Suggested Topics for Leadership Cases and Role Plays to be Drafted (Feedback from ELI Mentors)

1. Student dismissal for clinical education and affective issues and professional issues (Margaret, Mark)

**ELI Fellowship Work Group Conference Call Minutes
November 12, 2014; 3:00 – 4:00 pm ET**

- a. Roles include Dean, attorney, student
- b. Incorporate managing situation, use of learning contracts, institutional and program policies
2. Student cheating issues (Mary Dockter)
 - a. Legal issues
 - b. Administration, program, faculty, student, Student Affairs involved
3. Strategic Planning to negotiate for your program needs within the academic institution (Mark, Pat, Merrill Landers)
 - a. Advocate for your program and its fit within the university
 - b. University undergoing strategic planning at the same time as the College
 - c. Role of the program director and ability to see the larger perspective
 - d. Aligning Physical therapy program with university mission and goals and CAPTE requirements
 - e. Specific issues for Role play
 - Institution moving to hybrid learning model (faculty development, technology, training)
 - Institution incorporating IPE throughout all programs (faculty development, logistics, curriculum changes)
 - Institution moving to globalization of and now need to make the PT program own international education (cost ramifications, learning outcomes, etc)
 - f. These changes are not in the current PT program strategic plan and does the program move to become part of the operations of the institution – Program Chair must work with faculty for the program to fit within the new directions for the institution
 - Program has its own strategic plan that is not congruent with the institution's plan
4. Senior Faculty member leaves and takes several faculty members with them and the curriculum (David)
 - a. Involves the current chair and dean
 - b. Implications for CAPTE
 - c. Impact on students, institution
5. New program starting and enticing faculty and taking clinical sites (See if Carol will draft this case?)
 - a. Differentiate in the program's strategic planning what is unique about your program
 - b. Approach to be used with developing program (competitive vs collaborative)
 - c. Support for faculty and clinical sites
6. Tenure and Promotion Issues (Patricia Draves, Merrill Landers)
 - a. Role of program chair as a faculty mentor and faculty assessor
 - b. Institutional and program tenure and promotion policy and procedures

ELI Workgroup Meeting

- ELI Webinar comments – Technology effective and got all of the cameras to work, stayed within the time frame, subgroups got to meet each other, Scott Ward did a great closure (I'm jealous). Enough time to connect and allowed participants to talk mostly. Had a chance to connect to one another. Low stakes opportunity to try out technology with audio and video. Excellent introduction to the participants for the program and focus on the participants! Excited about the program! Camera orientation for participants and mentors. 2 hour time frame
- ELI Courses – Directions point the learner to the summary first for their checkpoint and place the summary on the top
 - Objectives should be single-barreled
 - Module 2 assertions – explore both sides of the content; APTA content disclaimer that it is not APTA's view (referenced not well); hear more about ACOs and medical homes and how they might impact physical therapy
 - Framework for vignettes on the topics as they relate to PT
 - All modules accessible to PTA and focus on specialization and may engage PTA educators a little differently; advanced PTA proficiency for their reference
 - Advice about readings
 - Copyright...what can be taken out of a book and scanned to share with participants (Lois) (Chapter, pages, etc)
 - First module creates the foundation for the Library
 - How much spending on the resources and is there any reimbursement for this? What can be required and recommended and what is foundational? Give them the Chapter and then decide if they should be purchased.
 - Check required readings on Module 1 to ensure required readings match
 - Help instructors contain readings for participants – chapter from a book (check with this)
 - Resources cost for ELI is (\$\$\$) for all of the readings/books for the academy
 - Cross-reference Module 1 resources for ** with the module
- Subgroups for mentors/participants for soft deadline for when to end Module 1 – negotiated with each subgroup when they begin their conversations for each module-suggestion by email soft deadlines to parallel coursework and discussions
 - Soft deadlines when you have provided the following posts and come together as a group; need a more rich dialogue
 - Interaction to occur in large and small groups on-site; consider involvement of faculty during office hours
 - Mentor conference call for first onsite session and soft deadlines for the group
 - Home institution project with the burden on the academic program sponsor
- Leadership Project
 - Mentors offer consultation and direction, however the home institution has responsibility for follow-up with them
 - Putting project together with the home institution – time frame depends upon the institution and the project (goals and objectives) – project plan
 - 3 modules – for November/December (Student Affairs and Legal Issues here)
- ELC – Yes or No coming (Workgroup, participants, mentors) – send definitive email to everyone for confirmation

- o Propose to the Academic Council a poster session at ELC to provide a sense of closure for the ELI participant (over lunch time session) create discussion for outcome product from ELI
- o Posters up as ELC beginning or ending depending upon when ELC and ELI occurs
- o Mid-day poster session would be there already (showcase product) and need to showcase people
- o Set up a meeting at ELC with Holly Clynych, Leslie Portney, Peggy Gleeson, and APTA to present work...how can they be recognize individuals and projects at ELI (Members of Workgroup, Marti, Susan, Mike Emery – Sunday/Monday)
- o Recognition at ELC and CSM Education Section/PTA Educators SIG/Academic Council acknowledge ELI graduates for both
- o Susan, Margaret, and Marti staying for ELI meeting (\$\$\$ shuffle) – Tues/Wed
 - Jansen add this travel to this and Gil to master list
- o Policies and withdraw before the start of ELI and after the Start
 - Before the program starts, individual can withdraw (or defer)
 - If he/she withdraws, tuition refund provided and (if defer hold the tuition)
 - Processing fee for the withdraw (\$150)
 - If someone defers or withdraws, need to move a wait list into the program by no later than June 1st
 - After the program begins – can only defer and there is no refund
- o Leadership Development Plan Template (landscape) – electronic format in landscape design (logo)

Leadership Development Goals	Action Steps	Timeline	Resources Needed	Other Persons Needing to be Involved	Evidence of Achievement of the Goal
1	a.	a.	a.	a.	
	b.	b.	b.	b.	
	c.	c.	c.	c.	
	d.	d.	d.	d.	
	e.	e.	e.	e.	
	f.	f.	f.	f.	
2	a.	a.	a.	a.	
	b.	b.	b.	b.	
	c.	c.	c.	c.	
	d.	d.	d.	d.	
	e.	e.	e.	e.	
	f.	f.	f.	f.	
3	a.	a.	a.	a.	
	b.	b.	b.	b.	
	c.	c.	c.	c.	
	d.	d.	d.	d.	
	e.	e.	e.	e.	
	f.	f.	f.	f.	

Leadership Project Outline Template

1. Project Title
2. Project Background
 - a. Include the project description, its purpose, and context in which it will occur.
3. Project Outcomes
 - a. Define project outcomes that are SMART (specific, measurable, achievable, realistic, and time referenced)
4. Potential Constraints/Challenges
 - a. Consider both internal and external constraints that could affect your project outcome.
 - b. Consider how your leadership style might impact your ability to attain your desired outcomes.
5. Resources
 - a. Consider the resources you have available and those still required.
 - b. Consider human, financial, and physical resources.
6. Strategies
 - a. Consider supportive data needed, any areas for negotiation, the development of relationships and partnerships, and legal implications.
7. Analysis/Assessment of Outcomes
 - a. Provide evidence for the achievement of the project outcomes.
 - b. Assess the degree to which you achieved the project outcomes.
 - c. Identify how you will validate the achievement of your outcomes.
8. Dissemination and Accountability
 - a. Identify where, how, and to whom you will disseminate your project outcomes.
 - b. Define to whom you are accountable for this project and its outcomes.
9. Anticipated Benchmarks and Timelines
 - a. Define anticipated benchmarks and when you will achieve specific milestones in your project.

Materials for the Onsite Session (ELI Program)

Confirmation of ELC Friday night attendance

- o Agenda (add to the end of the agenda) – Post September 16th
 - o Leadership Project Template
 - o Leadership Development Plan Template
 - o CAPTE Link
 - o Blue Mentorship Assessment (Bring 5 copies to onsite) – MENTOR CONFERENCE CALL)
 - o Preparing questions for the faculty of Modules 1, 2, and 3 and submit to Jody by September 26th
 - o Think about real-life leadership challenge, different from what you used with a partner in Module 1, for discussion on-site

- March and July 2012 dates (locations?)
- Bring computer

Case Vignette – Part I

You are a new female PT department chair for a 3-year DPT program who was just hired and your predecessor who just retired is no longer on faculty. You learn that 50% of the faculty members are older than you in the PT Program. You were previously a faculty member at another institution for 7 years as a Clinical Assistant Professor and recently completed a PhD. In your prior role as a faculty member, you contributed to teaching, research, and service in a Doctorate Granting University (“Research 1”) in an Academic Health Center. You are entering the Program Director position on a tenure track and astutely negotiated the rank of Associate Professor without tenure at a private institution in a Master’s College and University.

The PT program at the new institution will be reviewed for reaccreditation in 2 years. The faculty is comprised of 10 FTEs, 5 males, 3 females, and two faculty vacancies, with no significant faculty turnover in 8 years. The program consists of a total of 110 students with 40 students in the incoming class. The attrition rate for students per class for the past 3 years has been 2 students annually. The 3-year ultimate pass rate on the licensure examination was 83%.

The Dean has been in his position for 4 years and recently shared with you that faculty members are anxious about having a new program director with an unknown leadership style after 20 years with their previous established director. The Dean has indicated that there will be some institutional changes in the near future with respect to creating a more active and cohesive Council of Directors designed to advance initiatives within the college, relationships with the health care community given an underserved population, and exploration of interprofessional education within the academic institution.

1. **Analyze the *context* in which this vignette occurs and possible implications.**
2. **What do you perceive as the issues for the new program director?**
3. **As the new leader of the department, what are your first 3 priorities? Why?**
4. **What are the goals that you would like to achieve related to these priorities?**

Case Vignette – Part II

Several faculty members have approached you individually to change their teaching assignments and course schedules. One faculty member just received a HRSA grant, which includes release time for someone to assume part of his workload while he dedicates his time to his newly funded research. Meanwhile, the Dean has asked you to justify one of the current faculty vacancies, which without substantial rationale is at risk for elimination. In addition, the Dean has asked you to be involved in the development of a community health care education program for an underserved population with diabetes and obesity. This will address a strategic initiative of the institution to build good will and address the priority needs of the community.

1. **Given the additional information, have your priorities changed? If so, how and why?**
2. **What strategies will you use to approach your priorities at the personal, faculty, department, and institutional levels?**
3. **What specific goals/outcomes do you hope to achieve?**

4. How will you know if your strategies were successful?

Large Group Discussion

- Where did you have difficulty with these vignettes?
- What critical factors did you use to make these decisions?
- We observed that....
- How did you approach the process?

Tuesday, August 23, 2011

- **March 24-25, 2012 (Sat/Sun)**
- **July 18-19, 2012 (Wed/Thurs)**

Inexpensive air travel and close to an airport (30 minutes with a shuttle)

Low cost hotel rate (\$125- \$175)

Farther west for participants are AZ

Arrival and departure

Room set up

Audiovisuals - Internet

Meals Special Requests

Retreat with room with natural light (March warmer; July north)

Near a lake or view (both)

Breakfast (continental)

1 room for 25 persons

Round tables – crescent rounds of 5

Audiovisuals – Internet Webinar

Out of the building and walk

Exercise facilities

Summertime – Campuses with meeting facilities (Ithaca College for July meeting)

- Burlington, Vermont, Michigan, Wisconsin, Lake George

March

- Austin, TX
- Tucson, Phoenix
- San Antonio
- Santa Fe
- Alabama – Gold Coast
- Myrtle Beach, SC
- Jekyll Island; St Siemens

Application/ Letter of Intent

- Describe an issue at your institution that ELI could prepare you to address through your Leadership Project. (last bullet)

Application Evaluation Rubric

- Leadership Issue (not project)

ELI Bookmark – ELI (website underneath)

- Education listserv and Academic Council listserv and PTA Educators SIG – before the ELC
- After the ELC conference reminder in front of the community with the deadline (October and December) reminder
- PT in Motion; Component Newsletter, Informz direct email to all PT and PTA program directors (after ELC)

Website

Program Tuition

Program tuition for the participant, supported by the academic institution, is \$5,000 for the yearlong program. Program tuition includes the completion of a program orientation, nine online modules delivered through the APTA Learning Center, three required on-site courses (includes meals), mentoring provided throughout the program, and networking conference calls.

Continuing education units (CEUs) provided for each online module and for each on-site session.

Upon acceptance into the Education Leadership Institute, a \$1,500 deposit is required to confirm attendance. The balance of \$3,500 is due prior to the orientation, ~~on July 15, 2011.~~

Other Costs

Additional costs associated with this program will include the travel and hotel accommodations for the three required on-site sessions. Other costs associated with the online learning modules relate to reading references that may need to be purchased.

If the graduate attends the final optional alumni event for Education Leadership Institute held concurrent with the fall Education Section's Education Leadership Conference (ELC), there will be costs associated with travel and hotel accommodations.

Course Calendar – change modules 4, 5, and 6

Calendar take out cohort years and just describe item (with ELC) – Neutral

Application/notification/orientation

Take out calendar years

Insert application period timeline October – December

Notification to applicants (February)

Program Length

This program is one year in length.

The first year of the program will begin with a program Orientation ~~in July 11, 2011, and will end July 2012.~~ There will be an optional alumni event for Education Leadership Institute graduates held in October ~~2012~~ concurrent with the Education Section's Academic Council/PTA Educator's SIG fall Education Leadership Conference. This cycle will repeat annually.

The Education Leadership Institute (ELI) is a shared collaborative between the Education Section, Academic Administrators Special Interest Group/Academic Council, Physical Therapist Assistant Educators Special Interest Group, and APTA. Participation in this program is by application and selection only.

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This year-long blended learning program is designed to develop physical therapist and physical therapist assistant education program directors with leadership skills to facilitate change, think strategically, and engage in public discourse to advance the physical therapy profession.

● Education Leadership Institute (ELI)

The Education Leadership Institute is a shared collaborative between the Education Section, Academic Administrators Special Interest Group/Academic Council, Physical Therapist Assistant Educators Special Interest Group, and APTA. Participation in this program is by application and selection only. This yearlong blended learning program is designed to develop physical therapist and physical therapist assistant education program directors with leadership skills to facilitate change, think strategically, and engage in public discourse to advance the physical therapy profession.

Targeted toward higher education culture.^{1,2}

Program Length

This program is one year in length.

The program will begin with a program Orientation in July. There will be an optional alumni event for Education Leadership Institute graduates held October concurrent with the Education Section's/Academic council/PTA Educator's SIG fall Education Leadership Conference. This cycle will repeat annually.

Application

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- ~~A preference is given to e~~Emerging and novice physical therapist and physical therapist assistant academic administrators (0-7 years), ~~given a sense of urgency to prepare current and future academic administrators.~~

For the Institution

Completion of the Nomination Form that includes:

- Submission of the Nomination Form completed by the APPLICANT'S Dean/Administrative Supervisor.
- Institution Statement of Commitment to support (tuition, fees, time, and other costs) the applicant during a yearlong program and in a leadership project that responds to a problem/issue/need with the applicant's academic institution.

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ELI WORKGROUP

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- Current members of the Education Leadership Committee HAVE responsibility for the implementation, evaluation, and oversight of the Education Leadership Institute. WORKGROUP MEMBERS consist of representatives that ARE part of a shared working collaborative with the Education Section, Academic Council, PTA Educators SIG, and APTA and include:

Add Lois Nora, MD, JD, MBA

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For AY 2011-2012, the ELI mentors includeand the faculty teaching the online modules include check on this with other websites

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ELI Fellowship

- How do we address individuals who may not demonstrate the skills to serve as a department chair during ELI?
- Professional organized opportunity to develop into future leaders
- Not a pass/fail situation but an opportunity to assess readiness for this program
- Application process designed to select appropriate persons for ELI
- Conversation with Beth and Lois about approval or disapproval process
- Completed an educational experience with CEUs and mentoring

Assessments

- Mentor/Participant Assessment – In October and July onsite sessions

- On-site Assessment - Post electronically complete and submit after each on-site component and send to me (COUPLE WEEKS TO COMPLETE)

ELI APPLICATION PROCESS – POST THIS NOW AND SEND TO ME; CONFIRM ATTENDANCE AT ELC/SEND THIS NOW DEADLINE: AUGUST 31ST

**Education Leadership Institute Fellowship Work Group
Conference Call Minutes, 12/11/15**

1. Welcomed Dr Karen Abraham, the newest member to the ELI Work Group representing ACAPT.
2. Review of the Draft Second Onsite Agenda (Mentor Version) and Related Materials
 - Draft ELI Second Onsite Agenda (Mentor Version) – No revisions were made, however it is missing onsite room locations and final assessment links
 - Need to create the Fellow-in-Training Agenda version (without hints)
 - Case vignettes for modules 4, 5, and 6 were not changed
 - Role Play Situation was not changed
 - It will be up to the mentors if they would like to add/replace any of the current case vignettes with the new cases that have been developed (see item 3)
 - Shared the other resource documents that are used during this onsite session
 - Leadership Development Worksheet
 - Leadership Project Outline
 - Mentorship Assessment
 - Covenant
3. Review of New Cases/Role Play Comments/Edits
 - All 4 cases and one role play revisions were reviewed and final changes were accepted and posted on the HUB community.
 - New cases will be shared with the mentors and enable them the option of using or interchanging cases/role plays; this will be shared during the next mentor conference call with Libby.
4. Comments/Observations on Supervisor Survey Data (2015): Refer to Folder Assessments, “Aggregate ELI Assessments 2011-2014”
 - Survey data collected from ELI Fellow supervisors was provided for the following groups and the Work Group reviewed the Aggregate New Graduate Supervisor Survey. The question arose regarding responses about those who strongly disagreed given overall very positive responses from Supervisors.
 - New Graduate Supervisor Survey (2015 cohort)
 - One Year Graduate Supervisor Survey (2014 cohort)
 - Aggregate New Graduate Supervisor Survey: 2011-2015
 - Aggregate One Year Graduate Supervisor Survey: 2011-2015
5. Question on Applicant Criteria Evaluation
 - Margaret’s Question: The one question I had regarding the Admissions Criteria has to do with meeting CAPTE criteria. What do we do with a candidate who is finishing his/her terminal degree - therefore currently does not meet criteria but is in the process?
 - *The group would be inclined to consider this individual to accept the applicant if the doctoral degree is underway within a defined timeline. If CAPTE determines the individual to be eligible then ELI would consider them eligible.*

**Education Leadership Institute Fellowship Work Group
Conference Call Minutes, 12/11/15**

6. Status Program Updates

- 2016-2017 Call for Applicants due January 15, 2016 (updated announcement to be shared this month through ACAPT, Education Section, Components, and Residency and Fellowship Programs).
 - ELI WG conference call to review applicants: *February 10, 2016; 2:30 – 4:30 pm ET*
 - Libby will upload completed applications as they are submitted in the HUB Community for your ongoing review.
 - **Work Group Assignment: Final applicant reviews will be due to Libby with each of your applicant aggregate scores by February 5, 2016.**

- Graduation Speaker - Dr Pamela Duncan confirmed
- 2016 First Onsite Session keynote - Dr Barbara Sanders confirmed
- New ELI WG Member – Dr Karen Abraham (welcome!)
- New Interim Program Director – Libby Ross, January 1, 2016

- Faculty Retiring from the Program
 - Module 3: Institutional Leadership and Management – Nancy Hall (2017)
 - Module 6: Resources/Financial Management – Melanie Gehen (2017)
 - Module 8: Program Development and Assessment – Robert Mundhenk (2017)

- ELI Mentors Confirmed To Date that are Retiring from the Program (need to identify her replacement)
 - Becky Craik (2016)

Potential Mentors Suggested for 2016

 - Claire Peel (mentor/higher administration/CAPTE) – Vice Provost of Academic Resources at University of North Texas (UAB previously)
 - Martha Ferretti – Former member of the ELI Steering Committee and ELI Fellowship Work Group member, Program Chair for PT and OT programs at OUHSC.
 - **Work Group Members Assignment: Please suggest other names for potential mentors to replace Becky Craik by January 15, 2016.**

- Reports Due
 - Notice of Change of Director Due: January 1, 2016
 - Annual Fee Invoice: January 8, 2016
 - ABPTRFE ELI Fellowship Annual Report Due: January 31, 2016
 - ABPTRFE ELI Reaccreditation Report Due: April/May 2016 for site visit for 3rd ELI Onsite Session (2016) – Check this with Kendra Harrington

ELI Workgroup Minutes

August 8, 2012

Mentorship Assessment

- Directions need to be clarified – Mike and Mike
- Will use the form for all 3 sessions!
- Evaluate each mentor in their role
- Evaluate participant in mentoring by each participant
- Add developmental comments by adding another item on the tool (#8)
- Provided mentor qualitative comments
 - 1st Session: mentors provide feedback as a team to each individual participants – more specific information (individual mentor to participant)
 - 2nd Session: Developmental item (#8) – Observations and suggestions
 - 3rd session team mentor composite form to participants; more general information (commented on what knew throughout the year) – where to go next
 - Participant evaluate 1 peer, self, and 2 mentors (4 copies); keep the same peer to assess throughout the year
- Mentors need time to complete the form during the session

Mentors

- Do not pair retired or near retired mentors in the same subgroup!
- Mentors at different places in their leadership careers.

Onsite Session Considerations

- Reasonable transportation costs (shuttle preferred)
- Natural lighting available in rooms
- Internet accessible
- Ethernet for Adobe Webinar
- Tempe, AZ keep (March)
- Place to walk in the city for morning walks

Faculty Discussion Board

- Post a comment to a discussion forum question with mentors establish a soft target to post a comment to relate to the office hours; Virtual office hours
- Realize when the discussion forums are occurring
- Could we match the Discussion Forums with the virtual office hours to get the “soft dates”?
- Subgroups provide more guidance and use of office hours and discussion forum

Mentor Subgroup Conference Calls

- Open questions for the participants to lead
- Every participant has “time” on the one hour conference call “What’s happening in your life?”
- ELI Graduate participate in one of the conference calls for this group

Module 7

- More applied budgeting and spreadsheets to physical therapy

Module 8

- More rubrics - reference text for rubrics

Module 9

- More on situational leadership and leading from the middle – Deborah Waddill

Testimonials from ELI Graduates – clips from Graduate Surveys (website)

- Past participants and what they said about ELI
- Need permissions from the graduates

Public vs Private/ Institutional Differences

- Address issues for how they differ around the issue of financing (module 7)
- More involved in the profession
- Make a better effort
- PT and PTA leadership

Page 22: 100% continue in leadership in the next year (ELI grad survey)

Faculty Q & A during Webinar

- Comment on different educational environments and how it impacts on leadership, politics, etc?

Module 3 – Question 9 and 3 (Nancy Hall)

Module 4 – Question 1 and 12 (Student Affairs)

Module 5 – Question #1 check the key and the question (Legal and Policy Issues)

ELI Hours Tracking Sheet

- Document the number of hours spent per week on the items listed for any activity

Alert: One week out before onsite has everyone taken the exam?

ELI graduates need to complete tests by ELC as the deadline?

August 9, 2012

Complete revised Leadership Development Reflections prior to arrival at ELI onsite session

Positive about the role of program director/mentor (t-shirt no vortex of negativity watermark)

Third Onsite Session

Headlands, MI

Mackinaw Island, MI

Lake Tahoe (Reno) – Dinner Cruise

Denver, CO in the mountains

Module 2

Add: Include interprofessional information in the institution

Webinar – Interprofessional issues regarding how to lead in a different institution

PR/Marketing

ELC

- Bookmarks – ELC
- ELI Panel session – summaries
- Ribbons – Grads and Participants
- ELI Fellows – PINS???
- ELI Tent Name Cards with ELI logo

Marketing Group

- Institution Deans – direct email Informz; CAPTE list of Deans PT and PTA accredited and developing programs
- Direct email program directors (PT and PTA programs) 1st
- Website
- Summary of program 3rd class for application!
- Leadership Project Examples
- Promote faculty diversity for modules

Shared Partnership

- Update communication prior ELC – PTA Educator SIG, Academic Council, Education Section
- Photo of graduates – PTNEWS Now

Dissemination

- PT Magazine ELI Graduate's Story
- U-tube grads for website (What is ELI all about?) – March 2013
- **Testimonial (written) website**
- Publication about the development of ELI Program of high quality – peer review
 - Beth and **Lois** (need help for the publication) as an article
 - Define measures from goals
 - JOPTe – Innovative model for fellowship development in higher education leadership (ABPTRFE) – Outline for the article (JFrost); intra- and interprofessional
 - *Ask faculty where we might publish*
 - *Academic Medicine – Lois; AAHE; Profession look at leadership development for its educators and call for action due to leadership shortages*
- Data about the graduates/program after 3 cohorts (year 3 after new grads -2014)
 - *Program data – Academic Medicine; AAHE*
 - *IPE Journal – JIPC, Academic Medicine – broaden outreach*
 - *JRIPE Journal*

Website Updates

- [Overview](#)
- [Curriculum](#)
- [Annual Calendar \(.pdf\)](#)
- [Mentors](#)
- [Costs/Time Commitment](#)
- [Application](#)

- ELI Graduates (list names, institutions, state) Class photo
- Why Should I consider ELI?
 - Fellow Stories of Success – “Permission to post” with names
 - Data – 100% improved my leadership skills
 - July 26, 2012 PT News Now story
- ELI Workgroup
 - After Fellowship change everything to fellow and fellowship
 - Overview
 - Mission
 - “Designed to meet contemporary education leadership needs with an eye toward the future.”

Reorder and edit

Participant Outcomes

Integration of Education Leadership Concepts

- Apply contemporary leadership knowledge, skills, and behaviors associated with leadership in higher education to physical therapy.
- Participate in course, program, and long-term professional evaluations to shape the continued enhancement of leadership competencies.
- Incorporate education leadership concepts within a Leadership Project and Leadership Development Plan.
- Apply leadership theoretical frameworks that incorporate concepts such as structural, human resource, symbolic, and political leadership.

Leadership Development

- Develop leadership assessment and feedback skills.
- Refine a Leadership Development Plan with the support of the academic institution, peers, and Education Leadership Institute mentors.
- Develop a strong network of ELI fellows to advance leadership within physical therapy.
- Empower ELI fellows to facilitate and expand networks with colleagues in their academic institution and higher education.

Leadership Project Based on an Issue/Need

- Develop, refine, and implement a Leadership Project that is relevant to the needs of the participant's academic institution and that facilitates the resolution of an issue/need within the supporting academic institution.
- Involve the academic institution's leadership, including signed consent by the participant's Dean/supervisor, with the participant's Leadership project. throughout the Education Leadership Institute. This project may or may not be fully realized by the completion of the Institute and may continue beyond the year long curriculum.

Program Orientation

A 2-hour orientation, using videoconferencing, facilitate participants' understanding of the roles and responsibilities of program participants, mentors, faculty, and moderator. This orientation overview addresses the following:

- Expectations of program participants including challenges, rewards, the institutional leadership project based on an issue/need, and personal leadership development plan are addressed.
- Opportunity to connect online with fellow participants, mentors with identification of participants and mentor networking subgroups, program moderator, and **Fellowship Program Director**.
- Instructions about how to access the APTA Learning Center to complete the online education component **and e-community for fellow and mentor networking**.

Online Education Component

Throughout the year long program, participants complete a series of nine online modules focused on higher education in the APTA Learning Center that include curricular content, case-based situations, reading resources, and assignments that facilitate the application of content. The nine program modules that comprise the online learning component include:

- Module 1: Personal Leadership and Management (**Authors and click on link for bio for all modules**) (CEUs)
- Module 2: Higher Education, Healthcare Systems, and Society (CEUs)
- Module 3: Institutional Leadership and Management (CEUs)
- Module 4: Student Affairs (CEUs)
- Module 5: Legal Issues (CEUs)
- Module 6: Human Resource Management (CEUs)
- Module 7: Resources/Financial Management (CEUs)
- **Module 8: Program Development and Outcomes Assessment (CEUs)**
- **Module 9: External/Internal Relationships, Influence, and Partnerships (CEUs)**

Faculty content experts **who** teach the online modules are selected from outside of physical therapy to broaden each participant's perspective and understanding of leadership within the context of higher education. Module content will be applied directly to physical therapy situations during mentor e-community sessions and face-to-face sessions.

Program content provided in the online modules is coordinated with the face-to-face components where learned content is integrated into real life situations and problems with support and guidance offered by mentors. Integration of program content, as applied to the roles and responsibilities of Academic Administrators, will be provided by highly experienced physical therapist and physical therapist assistant academic administrator mentors, leaders, and positive role models. Participants will receive CEUs for each of the modules completed in the online education component to include posttest assessments and post module evaluations.

Onsite Education Component

Participants will be required to attend **3** face-to-face education components that are sequenced in relation to the online education component. ~~The fourth session is an optional alumni event for the graduates of the Education Leadership Institute.~~

Face-to-face sessions provide an opportunity for participants to engage with ELI faculty and mentors about the curriculum content. These sessions focus on connecting theory with practice to enable participants to directly apply curricular content provided in the online modules to every day practices and through networking with their colleagues and mentors.

The first face-to-face session is convened at the fall Education Leadership Conference (ELC) to facilitate **integration** with the Education Section, Academic Council, and Physical Therapist Assistant Educators Special Interest Group (SIG). In addition, this design facilitates the integration of the **fellows** with Education Leadership Institute participants within the Education Section, Academic Council, and the Physical Therapist Assistant Educators SIG to further their leadership development. The second and third face-to-face meetings will occur in a separate retreat format independent of other conferences with locations that are to be determined on an annual basis.

~~The final optional face-to-face session will occur at the fall Education Leadership Conference where Education Leadership Institute alumni will be recognized with an opportunity to meet the new Education Leadership Institute cohort.~~

~~Participants will receive CEUs for each of the face-to-face training components.~~

Participant Leadership Projects (See previous work and replace)

Integration of Education Leadership Concepts

Advance the learning project and the leadership development plan as a result of the application and integration of curricular content. Participate in course, program, and long-term professional evaluations to shape the continued enhancement of the Education Leadership Institute.

Leadership Development

Develop and refine a leadership development plan, throughout the Education Leadership Institute, where the implementation of this plan will begin with the support of the academic institution and Education Leadership Institute mentors.

Leadership Project

Develop, refine, and implement a leadership project that is relevant to the needs of the participant's academic institution and that facilitates the resolution of a leadership project within the supporting academic institution.

Last updated (coding)

Calendar: Use Updated version for the fellowship application

Education Leadership Institute (ELI) Mentors

Mentorship is an essential component of the ELI program. Mentors provide focused learner-centered guidance throughout the yearlong program. Collectively, mentors are experienced program directors from physical therapist and physical therapist assistant programs and represent diverse institutional settings including public/private and Carnegie classifications. They are full participants in the on-site and on-line aspects of the program and have access to all materials. Mentors provide regular and timely interaction with the participants through coaching, advising, and thought provoking questions on an individual basis as well as through their assigned small group during the Institute.

COSTS/TIME COMMITMENT

Program Tuition

Program tuition for the participant, supported by the academic institution, is \$5,000 for the yearlong program. Program tuition includes the completion of a program orientation, nine online modules delivered through the APTA Learning Center, three required on-site courses (includes meals), mentoring provided throughout the program, and networking conference calls.

_____ Total Continuing education units (CEUs) are provided for completion of the 9 online modules and for each on-site session

Upon acceptance into the Education Leadership Institute, a \$1,500 deposit is required to confirm attendance. The balance of \$3,500 is due prior to the orientation in July.

Other Costs

Additional costs associated with this program will include the travel and hotel accommodations for the 3 required on-site sessions situated throughout the US. Other costs associated with the online learning modules relate to **accessing or purchasing required reading texts**.

If the graduate attends the final optional alumni event for Education Leadership Institute held concurrent with the fall Education Section's Education Leadership Conference (ELC), there will be costs associated with travel and hotel accommodations.

Time Commitment

- The program spans one year.
- The 3 required onsite sessions include 2-full days each plus travel.
- Online learning requires review of modular content, readings, and outside assignments.
- Opportunities to interact with content expert faculty and mentors.

Education Leadership Institute (ELI) Application

A competitive application process is based on a set of established criteria. Invitations will be extended to successful applicants in early February.

Eligibility Requirements for Program Applicants

- Emerging and novice physical therapist and physical therapist assistant academic administrators (0-7 years).
- Current membership in APTA.
- US licensure/registered/certified or licensure eligible (exception for PTAs in Hawaii and Colorado)

Application Process

For the Applicant

Completion of the Participant Application that includes:

- **Applicant demographic information**
- Curriculum Vitae to include evidence of past leadership experiences
- Statement of commitment to the Education Leadership Institute program
- **Letter of intent addressing past leadership/management challenges and successes, future leadership goals, anticipated contributions to the applicant's academic institution through a leadership project.**

[Education Leadership Institute \(ELI\) Application \(.doc\)](#)

For the Institution

- Submission of the nomination form completed by the applicant's dean/administrative supervisor.
- Institution Statement of Commitment to support (tuition, fees, time, and other costs) the applicant during a yearlong program and in a leadership project that responds to the needs of the applicant's academic institution.

ELI Fellowship Graduates

- 2012 Fellows (Photo reminder – July 26, 2012)
- **Why Should I consider ELI?**
 - **Fellow Stories of Success – “Permission to post” with names**
 - **Data – 100% improved my leadership skills**

Education Leadership Institute (ELI) Nomination Form (.doc)

Education Leadership Institute Fellows Workgroup

Current members of the Education Leadership Institute Fellows Workgroup are responsible for the oversight of the Education Leadership Institute. ELI is a collaborative effort with the Education Section, Academic Council, PTA Educators SIG, and APTA and include:

- Beth Domholdt, PT, PhD, FAPTA
- Michael Emery, PT, EdD, FAPTA
- Martha Ferretti, PT, MPh, FAPTA
- Susan Nelson , PT, MS
- Lois Nora, MD, JD
- Michael Pagliarulo, PT, EdD
- Margaret Plack, PT, EdD
- Jody Frost, PT, DPT, PhD (Program Director)

ELI Application for 2013-2014
Revised both forms

Open applications October 1, 2012
January 4, 2013 deadline

January 16th Conference Call Eli WG for Applicant review and decisions

ELI Fellow Grads/Alumni

- Each subgroup nominate a representative for your organizing committee
- Create their own leadership and structure – Let them drive the events and organizational structure for times such as ELC, CSM, Annual Conference
- Share Point Community

- Calendar
- Updated leadership resources
- Faculty new articles and texts

Strategic Plan for the Future ELI

- Mid-career program director in physical therapy
- Interprofessional ELI in the future
- Interprofessional Team ELI
- Macy Foundation – Interprofessional ELI (team from AAMC, AACN, ADEA, AACP)

Budget for 2013

ELI WG Meetings – 2.5 day (evening, full day, ½ day) – W/Th/Fr/Sat (2nd or 3rd week August)

- August 14-16 (Wed 5 pm end Friday 11:00 AM)

October 3-4: Meet with mentors after first session and get feedback!!

Conference Calls

- January 16, 2013; 3-5 pm
- March 27; 3-5 pm

2nd Onsite session” March 13-14, 2013 (3rd onsite July 10-11, 2013)

3rd onsite commencement speaker for 2013) – Lois Nora (July) – July 11th

Mentors

Pre-call for Onsite session #1, #2, and #3

Post conference call

Webinar for New ELI WG members

- Sept/Oct role in ELI
- December technology

Faculty conference calls

ABPTRFE Fee \$1300 annual (Annual report)

Faculty \$1000 per module

Dissemination/Research: Medline Search and Articles

ELC Reception – Shared food costs

Graduation Costs –

- Speaker costs
- Additional Dinner and open bar
- AV Costs
- Flowers

Mechanism for Monthly Interactions

- Adobe Connect or Conference Calls – 3 hrs (save \$\$)
- Google Hangout and need a gmail account
- Skype - Free

Review Applicants

- Accept 18 (deferring)
- Wait list (rank order applicants)
- If not used on wait list will be included in subsequent cohort

Meeting MinutesWednesday, August 13, 2014Locations

- Set the dates on the Website for all 3 onsite meetings in advance!
- Sign off as part of the acceptance with the covenant for October, March, and July
 - Application process includes dates for the program in advance for both Nominator and the Applicant
 - Add - ELC for Sept 30 – Oct 1 Baltimore, MD, Hyatt Hotel and March 2016 and July 2016
 - Unable to make these dates as a requirement of this program you may need to apply for next year?
- March – Kiawah, Tybee Island, Amelia Island, Hilton Head, Savannah, (Phoenix, Tucson), San Antonio
- July – San Diego, Sonoma, Monterey, Portland, Seattle, Utah, Vermont

ELI Promotional

- CSM Meet and Greet – ELC
- Direct Mail to Education Section membership
- ELI Fellows share someone interested – people ready for ELI
- Faculty SIG members -
- Residency and Fellowship (Erin and Patrick)
- NSC Student Conclave – Kendra Booth share information
- PTA SIG Educators Group
- CAPTE –Workshops; Developing programs workshop and onsite accreditation (awareness campaign);
- Program Directors – direct email (2)
- Value through word-of-mouth
- ACAPT Newsletter
- Faculty Workshop – 3-5 year plan
- Mike Pagliarulo at Ithaca/West Coast – PLUG ELI!
- Kendra forum on Residency and Fellowship - CSM

Outcomes of ELI Graduates – Promotional Piece

- Bulleted for social media/tweet!

ELI Alumni Opportunities

- Presentation – ELC session
 - 3 Questions – (color paper ID tags)
 1. Advance in leadership development?
 2. How do you plan to remain connected in your leadership?
 - 3.
 - Steering committee from ELI WG
 - Facebook Alumni page for ELI WG – To connect and network all fellows-sent already by Mary D
 - What would you like to see happen for ELI Fellows as a group?

- **One Day Preconference at The NEXT 2016 - Leadership**
 - Interactive session – Lynn Gangone
 - Deborah Waddill (Partnerships, Relationships, and Influence)
 - Power, Influence and Negotiation
 - 1. Discussion – resubmit and expand (HPA)

- Alumni expectations for ELI Fellows – No expectations really once they graduate!

**ELI FELLOWSHIP ONSITE ANNUAL MEETING – APTA HEADQUARTERS
WORK GROUP MINUTES
July 13-14, 2015**

The following summaries are based on discussion of questions posed in the 2015 Summary Program Highlights document.

1. ELI Fellowship Onsite Locations for 2016:
 - Decision: Locations to be within one hour of the airport to reduce transportation costs and time traveling

2. ELI Networking Breakfast Session at ELC

Small group roundtable discussion questions:

1. How do we as ELI Fellows become more involved in the future direction of physical therapy education leadership?
2. Share something that you have instituted in your program and how did you navigate this through a leadership approach?
3. Provide shared references as well on the same handout as future resources.

Plenary Discussion Question Shared in Advance of the Meeting

1. What are your perceptions about the future of physical therapy education and what is needed to achieve that future?
2. What are your thoughts about forming a consortia for ELI Fellows within ACAPT?

3. Mentor Term Limits

- A minimum of a 1 year commitment is required for a mentor with a maximum of a 3-year term limit.
- Enable more senior leadership to be involved in a mentorship role (political)
- Mentors may return again at another time after completing a 3-year term.

4. Marketing the ELI Program based on Admission Survey Data

- Provide an Informz blast email for a direct call about the ELI Fellowship to all PT and PTA program directors and residency and fellowship program directors. Please note that this is no longer possible with APTA's email system in order to remain PCI compliant. Other dissemination vehicles are used to include ACAPT news, Education Section news, Component news, promote through APTA's weekly communications, ABPTRFE through Residency and Fellowship programs.

5. Website and Stories

- Share outcome stories from the graduates and what they are doing now! (Testimonials will be used for the 2015 promotion by APTA communications group).
- Highlight the leadership projects on the APTA website from the summaries submitted for others to view their work!
 - Leadership comes back to the university

**ELI FELLOWSHIP ONSITE ANNUAL MEETING – APTA HEADQUARTERS
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- Survey graduates of ELI how they have contributed back to the program highlighting ELI fellow graduates
- Non-physical therapy leader in higher education can share stories about those who have completed the ELI Fellowship in their institutions (Carolyn Yucha, UNLV)
- How graduates may have changed institutions for a new position or advanced within interprofessional education or their institution?

6. Marketing ELI Program

- Proprietary programs and directors
- PTA programs

Current ELI Cohort

7. Message to Fellows-in-training regarding some of the online module feedback where they expect external faculty to be teaching about physical therapy.
 - Modules provide content expertise and are not necessarily designed to translate into physical therapy, whereas the onsite sessions and monthly mentorship meetings are designed to discuss and translate what is learned to physical therapy.
8. Messaging to programs: Leadership project is designed to give back to the supporting institution by the fellow-in-training and may require several years to be completed.

Revisions to Current Assessment Surveys

1. Admissions Survey
 - Add new item: “Learned from an ELI Fellow” (Done for 2016)
2. Onsite Sessions
 - Revise mentor question on the ELI Onsite surveys
 - I receive quality mentorship from mentors between sessions.
 - I received quality mentorship during onsite session.
 - Revised Faculty question on the survey:
 - Virtual faculty office hours were valuable. (Instead of “The availability of faculty through technology was valuable.”)
 - Revise “The prior modules’ content contributed to quality discussion by others” to read:
 - Prior modules’ content contributed to quality discussions.
3. Program New Graduate Survey and Ways to Engage Fellows-in-Training early about involvement in the leadership within the profession
 - Onsite sessions:
 - Mentors pose question during each onsite session about how the fellows-in-training can become involved in the profession based on what was learned within ELI.
 - Promote leadership opportunities within the profession at district, state, component, and national levels within the 2nd onsite session.
 - Mentor engagement to provide mechanisms where they can get engaged in profession-based opportunities

**ELI FELLOWSHIP ONSITE ANNUAL MEETING – APTA HEADQUARTERS
WORK GROUP MINUTES
July 13-14, 2015**

- Q #44 edited survey question to reflect changes
 - Note: Sharon Dunn, APTA President, shared opportunities at the ELI networking breakfast for ELI fellows to get involved in APTA in leadership roles through ACAPT, Education Section and its SIGs, Chapter levels, etc. Sharon also participated at one of the small group discussions to promote and support ELI.
4. Program One Year Graduate
- Add question to the one year graduate survey...
 - ELI has had a positive influence on my career development?
 - Question 34 and 35 are redundant
 - How can ELI Fellows get involved in the association at any level?
 - Purposeful to embrace new leaders within the profession
 - Hold a slot with individuals of specific capability for ELI Fellows
 - Alumni Hub Recommend: APTA Education Leadership Institute Fellow tag line on the webpage, business card, and curriculum vitae
 - Share how they assumed a new role within their academic institutions

Curriculum: Module Feedback Review and Summary to be shared with ELI faculty

1. Module 1
 - Excellent for leadership library of the future
2. Module 2
 - Regularly updated annually because of changes in higher education and health care
 - Need the introduction and conclusion tightened to demonstrate how the 3 topics are interrelated rather than 3 separate topics
 - Create an exercise that connects higher education and health care to address the needs of society (broader exercise that could include IPECP, clinical education, health policy, readmissions, funding)
 - Check for typos in section 2
 - Higher Education readings should be re-examine
 - Address issues of student debt and starting salaries
 - Financial crisis within higher education and state appropriations
 - Current trends in health care education and how students will need to be educated to meet those demands given ACA
 - Community college education changes, tuition changes, and available learning designs; address some of the issues associated with community colleges and how they are obtaining their knowledge in preparation for transitioning to other professional programs
 - Strengthen the connection between higher education and health care
 - Add reference on Innovative Models of Health Care (website reference)
3. Module 3
 - Recommendation to read the books in module 3...excellent
 - Excellent texts (Getting to Yes) – need to read these books for Module 3

**ELI FELLOWSHIP ONSITE ANNUAL MEETING – APTA HEADQUARTERS
WORK GROUP MINUTES
July 13-14, 2015**

4. Module 4
 - Great!
5. Module 5
 - Case scenarios very practical
 - Very relevant and practical
 - Evolves over time
 - Request if there is any legal precedent re: Admissions issues for body piercings, tattoos, facial piercings, nose piercings
6. Module 6
 - Re-check links for online modules
 - Provide password for links
 - Mention that the roles of Human Resources varies between institutions (staff, faculty)
 - Overlap between modules 5 and 6 (check on this to see if he needs to augment)
 - Develop strategic planning further
 - Add faculty workload information including the references shared during last year’s webinar on workload for faculty
 - Strategic hiring of faculty
7. Module 7
 - Check sample PT budget in the module
 - Explore how to relate to the PT budget using the budget template - emphasize this exists
 - Where else can you obtain funding streams (state appropriations, faculty practice, continuing education programs, grants) as income line items
 - For non-tuition revenues add faculty practice plans
8. Module 8
 - Provide curricular mapping – e-curriculum options
 - Address if there is any technology available for curricular mappings
9. Module 9
 - For the exercise revise to state: “Start a new program or imagine you were starting your program from the beginning how...”

New Case Vignettes

1. The 5 new case vignettes were reviewed by the ELI Work Group and revised as a group.
2. The revised cases will be shared with those ELI Fellow volunteer case review group to provide edits, comments, and feedback to the ELI WG for making final revisions to the cases for use in 2016.

ELI Promotion

1. Data about ELI program outcomes to create a leader in the profession matched with program strategic outcomes for the fellowship.
 - Send an email this year to each of the leadership groups in education inquiring how to build a future professional community?
 - How can we more effectively use the ELI Fellow graduates?
 - Provide a presentation at next year’s ELC meeting on 5 years of program outcomes.

**ELI FELLOWSHIP ONSITE ANNUAL MEETING – APTA HEADQUARTERS
WORK GROUP MINUTES
July 13-14, 2015**

2. Discuss with ELI Fellows during their breakfast the possibility of an ELI Consortium within ACAPT or another alternative to engage ELI Fellows in leadership and to have a voice
 - o Note: During the ELI Breakfast, a committee was formed to discuss and consider this and other options for the future.

Fellowship Status for 2016

A discussion of issues related to the ELI Fellowship Program occurred during this meeting, The 3 items were noted below as important:

1. Sustainability of the program with the appropriate resources and funding needed.
2. Program quality that continues to meet ABPTRFE requirements and high standards
3. Program outcomes that meet the programs goals and learner’s goals where the one area that reflects the need for advancement is how ELI Fellows are able to be engaged in leadership roles throughout the profession and association.

Defined Program Outcomes

Program Entry (2011-2015)	Current Status (2011-2015)	Summary Net Changes (2011-2015)
Program directors = 32	Program directors = 37	Program directors = +5
Dean = 1	Dean = 2	Dean = +1
Assistant Dean = 2	Assistant Dean = 3	Assistant Dean = +1
DCE = 2	DCE = 1	DCE = -1
Residency and Fellowship Director = 2	Residency and Fellowship Director = 3	Residency and Fellowship Director = +1
Faculty = 19	Faculty = 11	Faculty = -8
	University Fellow for Academic Excellence (new position) = 1	University Fellow for Academic Excellence (new position) = +1
Total = 58	Total = 58	

Recommended ELI Speaker for 2016 graduation

1. Pamela Duncan (largest research funding)** - NC
2. Mike Pagliarulo** (former Mentor, Board member, and program director) - Oregon
3. Allen Jette (PTJ Editor)

ELI 1st Onsite Speaker – Fall 2016

1. Dr Barb Sanders (ACAPT President)
2. Dr Scott Ward
3. Becky McKnight

ELI Application Issues (increase in the budget!)

1. Future possible consideration to open the program to other directors who are not US based and would need to be an International partner (eg, CPA, ASHA, PA, ATC, etc)
 - o This would need to go to the BOD for a change in the eligibility to ELI.

**ELI FELLOWSHIP ONSITE ANNUAL MEETING – APTA HEADQUARTERS
WORK GROUP MINUTES
July 13-14, 2015**

2. Decision: Application fees will increase for 2016-2017 cohort from \$50 to \$100
3. Decision: Tuition fees for ELI Fellowship Program will increase from \$5,000 to \$6,000 for the 6th cohort
4. Increases in fees will enable ELI to break even as a program

Discussion regarding committee members whose terms expire

1. Terms expiring: Patricia Draves, Margaret Plack, Mark Reinking

Recommendations: Qualifications for Non-PT member

1. Familiar with physical therapy and higher education
2. Higher education leadership
3. Brings a broader view/lens
4. Understands health professions program within the university
5. Ideally involved with other higher leadership programs
6. Suggestions
 - Jean Johnson, RN, PhD, FAAN (Dean, GWU; quite visionary and very much understands a variety of health professions)
 - Richanne Mankey, PhD - Interim VP for Institutional Advancement and Vice President for Student Affairs - Daemen College
 - Consider individuals who are Directors/VP for IPE, lead the Harvard Leadership Program, ELAM, HERS
 - Touch base with Lynn Gangone and Nancy Hall for suggested names

Retain the current ELI WG for another year during the program director transition

- Given the transition to a new Interim Program Director for ELI in 2016, the members of the Work Group agreed to stay on for another year to assist during this time.
- If Mark is elected as VP for ACAPT, his term will need to end and a replacement will be required.

ACAPT (have this ready to go if Mark is elected) – Barb Sanders

- Contact Barb Sanders to identify suggested names of persons to replace Mark on the ELI Fellowship WG as the new member. That individual should be:
 - A program director
 - Sponsored someone within ELI or may have completed the ELI Fellowship

Education Section

- Faculty members with professional leadership

Scheduled Conference Calls for 2015-2016

- November 18, 2015; 2:00 – 3:00 pm EDT
- February 10, 2016: 2:30 -4:30 pm (Review Applications and Decisions For Admissions)
- March 30, 2016: 2:30 – 4:00 pm (Review 3rd Onsite session and July Webinar materials)
- August 9-10, 2016: annual onsite meeting (Review program goals and outcomes, curriculum, learner outcomes, application materials, website, etc)

**Education Leadership Institute Work Group
Minutes 8/14-16/2013**

August 14, 2013

- Susan Baker – WG voted to have her reapply because of change in application status and institutional support! Send a letter to confirm reapplication!

Onsite Session Location Options for 2014

- March 2014 – Amelia Island, GA; Hilton Head Island, SC; Kiawah Island, SC; Tempe, AZ; Santa Fe, NM; Myrtle Beach, NC
- July 2014 – Seaview, NJ; N Marriott Resort, Marriott Hickory Ridge Conference Hotel – Chicago, IL; Providence, RI; Park City, Utah; Avon, CO or other Denver resort

ELI Alumni Opportunities

- Set up venues for Fellows to be able to network (not all necessarily need to have APTA provide food)
- Group email
- Leadership book club
- Reunion to get together by cohort
- Share Point Emails in the closed community
- Networking breakfast at ELI paid for by APTA (2013)
- CSM Social event – Alumni Event posted / dinner out at a restaurant
- Skype with the ELI Fellows
- Hold a room to offer a venue to get the group together
- Professional Development Session on Leadership – CSM or The Next Conference???
- Simple and sustainable
- Resources/articles to discuss from current ELI Faculty with an option to discuss
- Google Chat
- Kindle books with resources available online

ELI Fellowship

- Criteria required for funding scholarship to assist individuals within ELI for hotel, food, books
- Needs further investigation to determine feasibility, how much needs to be within the scholarship to be sustainable
- Application process for scholarship
- Long range perspective that will need more graduates to contribute
- Competition from many other scholarship options within the profession

**Education Leadership Institute Work Group
Minutes 8/14-16/2013**

ELI Promotional Opportunities

- **Twitter – APTA**
- **Facebook – APTA, testimonials, this month fellows-in-training learned about...**
 - Rotating Banner on APTA website
 - Monthly message to stakeholders – Alumni message
 - Education Section Newsletter, ACAPTA Newsletter, PTA Education SIG
 - Obtain direct email access for Deans?
 - Faculty Development Workshop – Education Section, Ithaca College (Pags/Ritzline); Promote during these workshops as a future next step
 - Provide information by the ELI Fellows during CSM to ACAPT, Clinical Education SIG, PTA Education SIG, Faculty SIG
 - Direct emails – 2 or 3 emails to program Directors (PT and PTA) and Residency and Fellowship Program Directors and possibly PTA Deans
- **Leadership Development program CSM 2015 (??) – Submitted Dr Lynn Gangone**
 - Component Newsletters
 - Fellows themselves!!!
 - Would you mind if we provided your contact information for those inquiring?
 - PTA Program Directors – State PTA Associations, Direct e-mail to PTA program directors, PTA Educators SIG, Educating Deans (CAPTE list of emails and send an email this year) – continue longer in their role in leadership, CSM Round tables for PTA educators
 - Eli Fellow Graduate – How do I assign value to the institution after the fellowship? How can I leverage this opportunity?
 - Webinar Chat with ELI Fellows – how to leverage what I need for the program?
 - 4 ELI Fellows serve as a resource to assist those interested?
 - Community College Foundation Funds for faculty support??

Create an Application Wait List This Year!

- Rank ordered wait list for this year if there are more applicants than available placements for those who elect to defer!

August 15, 2013

Assessment Reviews

Admissions Process

- Call for Applications September 16, 2013 posted for 2014 cohort
- Deadline for Applications prior to CSM is December 20, 2013
- ELI Website – (adjust contact hours for the Modules); Provide a mean and range of total time requirements for ELI Fellowship
- **Application – Changes to type in name and not use an electronic signature**

**Education Leadership Institute Work Group
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- Onsite sessions (travel and hotel costs)
- Requirements for texts that may be purchased, obtained from institutional library, downloaded on Kindle, or from a colleague – Part of leadership library

Online Module Additions and Comments

- **General Issues**
 - Discussion forum issues using other technologies
 - Clarify during the 1st onsite session that the journaling activity in each module is for the fellow-in-training and will not be shared with others (self-reflection)
 - **Mentorship sessions – check in and share something that you learned in your journal! - DONE**
 - Use the question as a conference call lead for the month
 - Curriculum Structure
 - On the question of whether or not to reverse modules 7 and 8 there was not sufficient compelling evidence to change it at this time
- **Module 1:**
 - Clarity the differences between leadership frameworks and management styles (module and face-to-face)
 - Resources for clarity on management styles
- **Module 2:**
 - Check required readings to ensure a match between what is published
 - Address changes in health care situations
- **Module 3:**
 - More depth on conflict resolution (role play onsite)
 - More practice during the onsite session on negotiation and conflict resolution
 - More on negotiating skills
- **Module 4:**
 - Additional information on Federal Financial Aid
- **Module 5:**
 - No changes
- **Module 6:**
 - More on compensation
 - Availability on workload issue guidelines or resources?
- **Module 7:**

**Education Leadership Institute Work Group
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- Best practices for research funding and budgeting
- Grant management/funding
- Non-dues revenues alternatives beyond tuition revenue streams
- Cash flow statements with balance sheets and statements for physical therapy as a work example

- **Module 8:**
 - Technology resources available for outcomes assessment

- **Module 9:**
 - Risk Analysis
 - Emotional intelligence
 - Technology and its use for influence and partnership and how to use/not use and not a module on technology (context and perhaps maybe not include technology)
 - How do technology resources influence our decision making in a leadership role?
 - How should we assess the outcomes in selecting technologies?
 - Pros and cons in using technology in building relationships?

Onsite Sessions

1st Session

- Faculty webinar make sure all faculty present
- Transportation and food are important (distance traveled and access)
- Opportunities to eat with different persons other than those in your small group
- Network after dinner

2nd Session

- Include team building exercise that maximizes the location
 - Scavenger exercise to answer questions and take photos and all on foot about history questions
- Opportunities to eat with different persons other than those in your small group
- Network after dinner

3rd Session

- Webinar technology issues – connect by phone and not use computer mics
- Opportunities to eat with different persons other than those in your small group
- Team building exercise
- Game/network after dinner
- **Include negotiation exercise for resources with a role play situation – First one this year!**

**Education Leadership Institute Work Group
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Program Outcomes

- Nothing identified as a significant problem
- Display data in a side-by-side document for multiple years for trending and longitudinal purposes
- **Add New Question: *Did the knowledge and skills gained from ELI make you are more effective leader in your current role?* (replace in the survey for 1, 3, and 5 post question: *The ELI Fellowship provided the knowledge and skills I needed for my current role.*)**
- **Survey of ELI Fellow's Faculty Members? Peer faculty evaluation? This is a sensitive situation and agreed not to do this at this time.**

What can be shared with ELI Mentors and ELI Faculty?

- ELI Mentors – Program Outcomes Survey (Used for program evaluation and mentor feedback for new graduate survey and eliminate any identifiers in the surveys) for current and past mentors
- ELI Faculty – Program Outcomes Survey (New Grad 1, 3, 5) same as above ensuring comments do not identify any individual fellow

New Assessments

- Provide for an ELI Mentor focus group post hoc after each onsite session. Questions to pose include:
 - Are there content areas that the learners find more challenging or content that is missing?
 - Is your role and expectations clear as a mentor in this fellowship and if not, what else would be helpful?
 - What has been your greatest challenge as mentors? Rewards as mentors?
 - Are you getting the support that you need in your role?
 - What advice would you have for new mentors coming into this role?
 - Are there individuals that you would suggest as future mentors?
 - Feedback about specific ELI logistics, communication, preparation, timelines?

Issues of Sustainability

- **Create a Program Assessment Summary based on current mission and goals that answers the question "Where are ELI Fellows now?"**
 - Share the summary with Board of Directors, ACAPT, Ed Section, PTA Ed SIG, ABPTRFE
 - Prepare a draft for review by the WG to be shared at ELC by representatives from the WG
 - Include summary in the various stakeholders' newsletters:

Discussion Forum Alternatives

**Education Leadership Institute Work Group
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- **Google Groups!** – Discussion Board! Investigate further (limit number of persons at the same time) – FREE (copy and paste) – *Test Modules 4, 5, and 6*
- **Minute Board (free)**
- **Today's Meet (free)**
- **Voice Thread (video, voice, and text) voicethread.com (fee-based) - \$79/month**
- Faculty need to know if these changes are to be made

Call for ELI Applications

- Call posted **September 16, 2013!!!**
- Call deadline is **December 20, 2013**
- Contact Rolando in December to see if he will be accepting the deferral and joining the cohort for 2014
- Susan Baker: reapply to the fellowship because of change in position
- Review applications: Need applications posted, Rubric score sheet totals by applicant
 - January 3, 2014 post all applications for WG review
 - WG members to send their review of applications with the rubric by January 13, 2014 to develop a summary spread sheet to share with all WG members in preparation for the conference call discussion
 - **Conference Call: Wednesday, January 15: 1:30 – 3:30 EST** Application Reviews
 - Following week send email notifications to all applicants re: status decision

Future ELI Speakers and Mentors

- **Commencement 2014**
 1. **Martha Ferretti (OK) - confirmed**
 2. Lynn Gangone (CO)
 3. Barbara Tschoepe (CO)
 4. Mike Pagliarulo (OR)
- 1st ELI Onsite Session 2014 Speaker
 1. **Terry Nordstrom - confirmed**
 2. Gail Jensen
 3. Tony Delitto
- Orientation Speaker Closing
 - **APTA President – confirmed**
- Names of Future ELI Mentors
 - PT
 - Tom Mohr (ND)
 - Marti Ferretti (OK)
 - Mike Majscak (NY)

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- Gary Krazilovsky (NY)
- Robin Dole (Widener, PA)
- Beth Marcoux
- PTA
 - Dave Perry (PTA Program Director, IACET, Former APTA Board member)
 - Becky McKnight – Consultant
 - Dennis Klima (MD)

ELI Fellowship WG – Call goes ACAPT and Education Section

- Nomination from the group – highly experienced PT program director not in a current leadership position with ACAPT
- Barbara Connolly
- Jim Gordon
- **David Greathouse - confirmed**

Conference Calls/Meetings for 2013-2014

- November 19, 2013; 9:00 – 10:00 AM EST – Review 2nd onsite session materials
- **Conference Call: Wednesday, January 15: 1:30 – 3:30 EST** Application Reviews
- March 18, 2014: 9:00 – 10:30 AM EST Review 3rd Onsite Session and July Orientation
- August 13-15, 2014 APTA Onsite Meeting:
- Check Board Meeting) not the following dates: 11, 12, 18-22, 27-29: DATE: 13-15 OK??

Budget Implications

- Program is ideally designed to be cost neutral
- CSM – Arrange for a dinner out a night or meet at the bar with ELI Fellows
- **CSM 2015** – Leadership session with external speaker and panel of ELI Fellows to follow
 - Annual Event on Lectureship Leadership
 - HPA Support, Education Section, ACAPT
 - Lectureship on leadership for conferences – how do these occur?
 - Suggestions:
 - Harvard Business Faculty
 - Parker Palmer
 - Steve Milam – leadership and legal issues
 - Lynn Gangone
 - CSM proposal – Mary D will provide assistance!!!
 - Facebook – Post on Facebook the leadership session
 - Costs associated with this session for 2015
- Google Chat feature costs for the Discussion Forum??
- New Bookmarks and ELI Fellowship Ribbons

Friday, August 16, 2013

**Education Leadership Institute Work Group
Minutes 8/14-16/2013**

Additional New Items to Add to the Modules, Discussion Forum, and Onsite Faculty Webinar

- Communication and conflict management (Modules 3 and 9)
- Ethical and non-ethical Leadership issues (Module 6)
- Politics in the university structure (both positive and negative); governance (Module 2)
 - Power in the university structure (types and use of – both positive and negative) (Modules 1, 2, 3)
 - Advocacy and being a team member! (Modules 2, 7, 8, 9)
- Leading horizontally versus vertically (in university hierarchal structure) (Module 3)
- **Plant a question on the Discussion Forum or Webinar about these items for those modules already launched for 2013!**

Broad Discussion of Issues Challenging Physical Therapist Education

- Qualified faculty with scholarly abilities and teaching skills
- Sufficient breadth and depth of clinical education sites and clinical educators
- Class sizes and number of increased programs
- Currency evolving model of care delivery of PTs and PTAs
- Number of constituencies need to work with as an education leaders
- Rapid turnover of PTA education leadership
- Numbers of programs developing
- Lack of PhD, ScD, and other doctoral programs

Vision (Provide to ABPTRFE annual update)

The ELI Fellowship will develop and inspire leaders to be visionary change agents who transform the future of health care and higher education.

Future Opportunities

- Consider interprofessional with other health professions (OT, PA, ATCs, Nutrition and Dietetics, MDs, RNs, others) in the future?
- International applications?
- *Spin off program mid-career leadership program with a series of courses for online series, CSM series, etc?*

Research

- Article on the Development of a Credentialed Fellowship for ELI (Margaret and Jody)
- Develop article outline this fall

Education Leadership Conference Opportunities

- Jody to draft outcomes report for review by WG and use at ELC!

**Education Leadership Institute Work Group
Minutes 8/14-16/2013**

- Mark and Mary speak to program outcomes for ACAPT, Education Section, PTA Education SIG, Clinical Education SIG
- ELI Fellows speak to groups about ELI program (ELC)

**Education Leadership Institute (ELI) Fellowship Work Group
MINUTES**

Tuesday, May 24, 2016

3:00-4:30 pm ET (2-3:30p CT, 1-2:30p MT, 12-1:30p PT)

- I. **ATTENDEES:** The following ELI work group members participated in the web conference: David Greathouse, Merrill Landers, Margaret Plack, Carol Plisner, and Karen Abraham. Libby Ross participated as staff.
- II. **MATERIALS 3RD ELI ONSITE SESSION:** The work group reviewed materials for the 3rd ELI onsite session scheduled on July 13-14 in Seattle.
- a. AGENDA (Mentor Version)
- i. Exploring Your Environment (7/13): Added new discussion question, “What about the content in Modules 7, 8, and 9 **left you with unanswered questions or wanting to learn more?**”
 - ii. Final Insights, Reflections, Challenges and More (7/14): Added new discussion question, “**Have your career leadership goals changed as a result of ELI?**”
 - iii. Graduation Speaker (7/14): Noted omission of “PT” from Dr. Pamela Duncan’s credentials for staff to correct.
- b. CASE VIGNETTES FOR MODULES 7,8, AND 9
- i. Case for Module 7: Delete extra space in sentence.
 - ii. Case for Module 8: No changes.
 - iii. Case for Module 8:
 1. Deleted “she” from 2nd sentence to make role of Board President gender-neutral.
 2. Moved existing #4 discussion question to top of the list: “What are the benefits to your program and faculty for you becoming involved in such an innovative initiative?”
 3. Moved existing question, “What are the risks?” under question #1.
 4. Added “**What parameters would you place on your participation?**” as new second item under question #1.
 5. Added new question “**How do you go about establishing realistic goals and a unified vision for this task force?**” as item #4 in the list.
- c. ROLE PLAY SITUATION:
- i. Increased the proposed class size change from 10% to **20%**.
 - ii. Determined the current class size in the scenario would be 40 students.
 - iii. Due to the change of percent to 20%, added statement to scenario description: “**A CAPTE application for substantive change will be required for approval.**”
 - iv. Revised the co-program director positions in the current role play to read 1 program director and 1 assistant program director. The group opted not to include the role of a DCE because it was unlikely that the position would be directly involved in this type of discussion or contribute to it beyond the shortage of clinical education sites that would result from a 20% increase in enrollment.
- d. OTHER DOCUMENTS: The work group did not make any suggested edits to the following reference documents related to this session: Leadership Development Worksheet, Leadership Project Outline, Mentorship Assessment, and Covenant

- e. PHOTOS AT GRADUATION: Staff will take pictures of the fellows and mentors during the 3rd onsite session and display them on the screen during the ELI banquet. The work group requested that the photos also be shared during the ELI Networking Breakfast at ELC in October as a way to welcome the newest class of fellows to the community. Staff will request an LCD projector and screen be available at the breakfast to display pictures of new graduates, as well as pictures of past classes.

III. ELI RE-ACCREDITATION REPORT FOR ABPTRFE

- a. STATUS UPDATE: An initial draft of the ABPTRFE re-accreditation report and associated appendices for the ELI Fellowship will be complete by May 27. The previous ELI program director, Jody Frost, will soon provide a few remaining items regarding the evolution of the program, as required by the accreditation standards.
- b. TIMELINE: The reaccreditation application must be filed between June 1 and August 31. Staff plans to submit the final report to ABPTRFE by July 31. The site visit is tentatively scheduled during the 1st onsite session in October 2016 in Phoenix, but may be pushed to the 2nd onsite session in March 2017 (location TBD). Since APTA decided accept a new cohort for the 2016-2017 term, it was no longer necessary to schedule the ABPTRFE site visit during the upcoming July 2016 onsite session.
- c. WORK GROUP: The group agreed to review the draft re-accreditation report, once available. Staff will attempt to schedule a call with the work group to review edits and questions in mid to late June (date TBD). A Doodle poll link will accompany the draft report. The program director will contact staff in the APTA residency/fellowship department to determine whether the work group should be prepared to participate directly in the re-accreditation site visit process.

IV. PLANS FOR ONSITE MEETING OF WORK GROUP (August 9-10, 2016)

- a. MEETING LOGISTICS: The work group was previously contacted by staff regarding the APTA Concur travel portal and encouraged to finalize travel plans, if not already done. The hotel reservations for the group have been confirmed. Staff will follow-up again shortly with updates and reminders, as needed.
- b. SUGGESTED TOPICS FOR ONSITE MEETING: The work group reviewed staff's suggestions for agenda topics for the August 2016 meeting. The agenda was deemed to be full and appropriate.
 - o ELI Assessments
 - Review Recent ELI Assessment Results
 - Review Timeline for Releasing Post-graduation Assessments
 - Review Questions and Purpose of Each Assessment
 - o Curriculum Structure
 - o Case Vignettes and Role Plays
 - Review Mentors' Proposed Revisions to 2nd Onsite Role Play
 - o ELI Budget and Fees
 - o Onsite Locations: History and Future
 - o Preparations for 1st Onsite for 2016-17 Cohort in October
 - o Application
 - Timeline for applicants to 2017-18 Cohort
 - Admissions Criteria
 - Rating Rubric - Move online?

- RF-PTCAS Discussion
- ELI Alumni Events and Networking
- ELI Marketing Strategies
- Faculty Vacancies
- ABPTRFE Reaccreditation Report and Onsite Visit Update
- Speakers
 - Identify Potential Graduation Speaker for 2016-17 Cohort
 - Identify Keynote Speaker for 2017-18 Cohort at 1st Onsite in October 2017
- Questions from Previous Work Group Meetings (will be grouped by topic area):
 1. Should the WG give more or less weight to new program directors versus more experienced ones?
 2. Is the mission of the program to train program directors and/or deans/provosts, etc?
 3. Should the Work Group develop a policy for applicants who apply from the same institution during the same year?
 4. How does APTA better market ELI to residency and fellowship programs?
 5. Should residency and fellowship program directors be included in ELI?
 6. Should institutional tuition support be required?
 7. Should work group formalize process to solicit and vet new work group members, mentors, and faculty?
 8. Should the ELI application include a new field or process that gives applicants an opportunity to explain any short-term positions, resignations, demotions, etc?
 9. Should there be a policy and procedure handbook?
 10. How should staff manage the issue of fellows-in-training who do not participate in virtual office hours?
- Schedule 2016-2017 Work Group Meetings

V. OTHER ELI UPDATES

a. UPDATE ON 2015-16 COHORT

- i. No fellows have dropped out of the program to date or reported any concerns to the program director following the staff transition in January.
- ii. The last virtual office hours for ELI Module 8 concluded on May 24.
- iii. ELI Module 9 will open on June 3.
- iv. Preparations for the 3rd onsite and graduation are on track.

b. UPDATE ON 2016-17 COHORT

- i. All 18 accepted fellows-in-training for the next cohort have submitted the initial ELI tuition payment to APTA and many have also paid the 2nd payment due by no later than July 1.
- ii. For the first time mentor and fellow biographies were collected and shared by staff via the new ELI community for the 2016-2017 cohort on the APTA Hub earlier this month.
- iii. The new cohort has also received additional materials and updates from staff, including:
 - Online calendar with dates for the 3 onsite sessions and module launches.
 - Mentorship group assignments
 - Hotel reservations for 1st onsite in Phoenix
 - Covenant
 - Module 1 required reading list
 - Instructions to access the new ELI community on the APTA Hub
 - Orientation information

- c. **ORIENTATION IN JULY:** The ELI Work Group is invited, but not obligated, to participate in the 2nd hour of the ELI orientation session scheduled on Tuesday, July 5, 2016 from 3:30-4:30 pm ET (2:30-3:30 pm CT, 1:30-2:30 MT, 12:30-1:30 PT). Go to <http://apta.adobeconnect.com/r55344288/>. Dial-in Number: **1-888-407-5039**, Passcode: **42610998#**

VI. Acknowledgments: Dr. Margaret Plack was recognized for her outstanding contributions to the Fellowship as a member of the original ELI Work Group and being a driving force behind the program's evolution and success. She will rotate off the work group in May. Dr. Susie Deusinger will be welcomed as the newest member of the ELI Work Group beginning in June.

VII. Adjourn: The meeting adjourned at 4:20 pm ET.

The ELI Fellowship Program Outcome: Fellow Survey (Post-Graduation)

Number of Responses Analyzed: 40

One year post graduation, Aggregate

1. Name of ELI Fellow:

(Respondents were limited to brief text responses)

Response
Amy Heath
Anita Santasier
Chris Sebelski
David M. Morris, PT, PhD
Deanna Lamb
Deborah Diaz
Denise G. Bender
Diane Heislein
Doreen Stiskal
Edward Barakatt
Ellen Lowe
Erin Conrad
Jill Horbacewicz
Jody Cormack
Julia Chevan
Karen Abraham
Katherine Harris
Kevin Brueilly
Kevin Chui
Kimberly Novak
Lisa Donegan Shoaf
Mark Bowden
Mary Blackinton
Mary Dockter
mary kate (katie) mcdonnell

Merrill Landers		
Michelle Unterberg		
Nannette Hyland		
Nicole Christensen		
Patrick Pabian		
Sara F. Maher		
Shawn Drake		
Stephanie Dapice Wong		
Stephanie Kelly		
Susan Cotterman		
Susan Shore		
Tamara L . Burlis		
Terri Dinsmore		
Tim Noteboom		
Tina Recalde		
	Valid Responses	40
	Total Responses	40

2. APTA ID#:
(Respondents were limited to brief text responses)

Response
102868
110267
112184
1226
13779
14195
156888
176260
17927
184718
185595

1925	
210116	
210283	
21416	
22068	
23434	
235758	
237865	
261164	
269382	
28791	
2999	
309296	
32328	
342148	
393634	
394999	
44830	
45750	
46758	
47685	
48006	
4820	
5171	
53883	
55527	
6717	
7726	
9937	
Valid Responses	40
Total Responses	40

3. Year of graduation from ELI:
(Respondents were limited to brief text responses)

Response	20%	40%	60%	80%	100%	Frequency	Count
2012						32.5%	13
2013						32.5%	13
2014						35.0%	14
						Valid Responses	40
						Total Responses	40

4. When are you completing this survey?
(Respondents could only choose a single response)


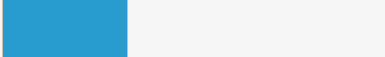
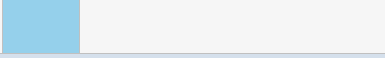
Response	20%	40%	60%	80%	100%	Frequency	Count
1 year post-graduation						100.0%	40
3 years post-graduation						0.0%	0
5 years post-graduation						0.0%	0
						Valid Responses	40
						Total Responses	40

5. The ELI Fellowship has enabled me to assume new leadership roles in academic administration.
(Respondents could only choose a single response)

Response	20%	40%	60%	80%	100%	Frequency	Count
Strongly Disagree						5.1%	2
Disagree						12.8%	5
Agree						38.5%	15
Strongly Agree						43.6%	17
Not Answered							1
						Valid Responses	39
						Total Responses	40


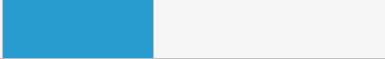
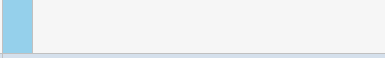
7. The ELI Fellowship has enabled me to assume new leadership roles at the national, state, and/or local level of the profession.

(Respondents could only choose a single response)

Response	20%	40%	60%	80%	100%	Frequency	Count
Strongly Disagree						0.0%	0
Disagree						47.5%	19
Agree						32.5%	13
Strongly Agree						20.0%	8
						Valid Responses	40
						Total Responses	40

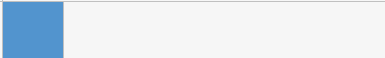

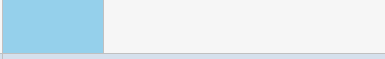
9. The ELI Fellowship has enabled me to assume new advocacy roles.

(Respondents could only choose a single response)




Response	20%	40%	60%	80%	100%	Frequency	Count
Strongly Disagree						0.0%	0
Disagree						57.9%	22
Agree						36.8%	14
Strongly Agree						5.3%	2
Not Answered							2
						Valid Responses	38
						Total Responses	40

11. The ELI Fellowship has enabled me to assume new interprofessional leadership roles.




(Respondents could only choose a single response)

Response	20%	40%	60%	80%	100%	Frequency	Count
Strongly Disagree						0.0%	0
Disagree						15.8%	6
Agree						57.9%	22
Strongly Agree						26.3%	10
Not Answered							2
						Valid Responses	38
						Total Responses	40



13. The ELI Fellowship has enabled me to participate in new initiatives within the profession (public discourse).
(Respondents could only choose a single response)

Response	20%	40%	60%	80%	100%	Frequency	Count
Strongly Disagree						0.0%	0
Disagree						42.1%	16
Agree						42.1%	16
Strongly Agree						15.8%	6
Not Answered							2
Valid Responses							38
Total Responses							40

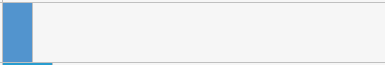


15. The ELI Fellowship has enabled me to participate in new initiatives within my academic institution (change agent).
(Respondents could only choose a single response)

Response	20%	40%	60%	80%	100%	Frequency	Count
Strongly Disagree						0.0%	0
Disagree						5.1%	2
Agree						59.0%	23
Strongly Agree						35.9%	14
Not Answered							1
Valid Responses							39
Total Responses							40

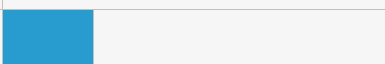

17. The ELI Fellowship has enabled me to become more involved in the in mentorship/empowerment of others.
(Respondents could only choose a single response)

Response	20%	40%	60%	80%	100%	Frequency	Count
Yes						97.4%	38
No						2.6%	1
Not Answered							1
Valid Responses							39
Total Responses							40

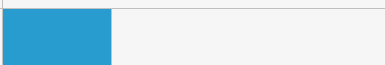

19. The ELI Fellowship has had a positive effect on my current role.
(Respondents could only choose a single response)

Response	20% 40% 60% 80% 100%	Frequency	Count
Strongly Disagree		0.0%	0
Disagree		2.6%	1
Agree		7.9%	3
Strongly Agree		89.5%	34
Not Answered			2
Valid Responses			38
Total Responses			40

21. The knowledge and skills gained from ELI made me a more effective leader in my current role.
(Respondents could only choose a single response)

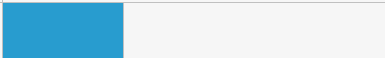

Response	20% 40% 60% 80% 100%	Frequency	Count
Strongly Disagree		0.0%	0
Disagree		0.0%	0
Agree		23.7%	9
Strongly Agree		76.3%	29
Not Answered			2
Valid Responses			38
Total Responses			40

23. The ELI Fellowship has enhanced my ability to think strategically.
(Respondents could only choose a single response)




Response	20% 40% 60% 80% 100%	Frequency	Count
Strongly Disagree		0.0%	0
Disagree		0.0%	0
Agree		28.2%	11
Strongly Agree		71.8%	28
Not Answered			1
Valid Responses			39

Total Responses	40
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
25. The ELI Fellowship has enhanced my understanding of the context in which my program operates.
(Respondents could only choose a single response)

Response	20%	40%	60%	80%	100%	Frequency	Count
Strongly Disagree						0.0%	0
Disagree						0.0%	0
Agree						31.6%	12
Strongly Agree						68.4%	26
Not Answered							2
Valid Responses							38
Total Responses							40

27. Concepts learned throughout the ELI Fellowship have transformed what I do.
(Respondents could only choose a single response)

Response	20%	40%	60%	80%	100%	Frequency	Count
Strongly Disagree						0.0%	0
Disagree						5.7%	2
Agree						34.3%	12
Strongly Agree						60.0%	21
Not Answered							5
Valid Responses							35
Total Responses							40

29. I have continued to network with other members of ELI.
(Respondents could only choose a single response)

Response	20%	40%	60%	80%	100%	Frequency	Count
Yes						84.6%	33
No						15.4%	6
Not Answered							1
Valid Responses							39

Total Responses	40
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31. I implemented what I learned in curricular content in my work.
(Respondents could only choose a single response)

Response	20%	40%	60%	80%	100%	Frequency	Count
Yes						92.3%	36
No						7.7%	3
Not Answered							1
						Valid Responses	39
						Total Responses	40

33. I have been successful in achieving my professional leadership development plan outlined during the ELI Fellowship.
(Respondents could only choose a single response)

Response	20%	40%	60%	80%	100%	Frequency	Count
Yes						84.2%	32
No						15.8%	6
						Valid Responses	38
						Total Responses	38

34. The ELI Fellowship has helped me identify strengths and weaknesses in my leadership style.
(Respondents could only choose a single response)

Response	20%	40%	60%	80%	100%	Frequency	Count
Strongly Disagree						0.0%	0
Disagree						0.0%	0
Agree						21.6%	8
Strongly Agree						78.4%	29
Not Answered							1
						Valid Responses	37
						Total Responses	38

36. The ELI Fellowship has enabled me to refine my leadership styles across the four dimensions presented by Bolman and Deal.

(Respondents could only choose a single response)

Response	20%	40%	60%	80%	100%	Frequency	Count
Strongly Disagree						0.0%	0
Disagree						7.9%	3
Agree						28.9%	11
Strongly Agree						63.2%	24
Valid Responses							38
Total Responses							38

38. I would recommend the Education Leadership Institute Fellowship to others.

(Respondents could only choose a single response)

Response	20%	40%	60%	80%	100%	Frequency	Count
Strongly Disagree						0.0%	0
Disagree						0.0%	0
Agree						5.3%	2
Strongly Agree						94.7%	36
Valid Responses							38
Total Responses							38

40. How likely are you to seek/remain in a leadership position in physical therapy education over the next 2 years?

(Respondents could only choose a single response)

Response	20%	40%	60%	80%	100%	Frequency	Count
Very unlikely						0.0%	0
Unlikely						0.0%	0
Likely						18.9%	7
Very likely						81.1%	30
Not Answered							1
Valid Responses							37
Total Responses							38

The ELI Fellowship Program Outcome: Fellow Survey (at Graduation)

Total number of responses collected: 58

Aggregate

1. Name of ELI Fellow:
(Respondents were limited to brief text responses)

Response
A.N. Chaudry
Amy Heath
Anita Santasier
Brent Harper
Chris Sebelski
Christine McCallum
David Morris
Deanna Lamb
Debbie Diaz
Denise Bender
Diane Heislein
Doreen Stiskal
Edward Barakatt
Erin Conrad
Frank Bates
Gammon Earhart
George Fulk
Greg Karst
Gregory Karst
Holly Clynch
Jean Fitzpatrick Timmerberg
Jill Horbacewicz
Jim Farris
Jody Cormack
Julia Chevan

Justin Jones
Karen Abraham
Karen Huhn
Katherine Harris
Kevin Brueilly
Kevin Chui
Kim Novak
Lisa Donegan Shoaf
Marie Johanson
Mark Bowden
Mary Blackinton
Mary Dockter
mary kate mcdonnell
Matthew Ford
Merrill Landers
Michael McKeough
Michelle Unterberg
Nannette Hyland
Nicole Christensen
Patricia Nelson
Patrick Pabian
Sara F. Maher
Shawn Drake
Stephanie Kelly
Stephanie Wong
Susan Cotterman
Susan Shore
Tammy Burlis
Terri Dinsmore
Tim Noteboom
Tina Recalde

Todd Telemeco	
Tyler Cuddeford	
Valid Responses	58
Total Responses	58

2. APTA ID#:
(Respondents were limited to brief text responses)

Response
102868
104601
110267
112184
1226
124487
13779
14195
147358
15139
156317
156888
176260
17927
184718
185265
185595
190650
1925
207085
210116
210283
21416
22068

230558
23434
2358758
237865
261164
266818
269382
28791
2999
309296
312911
32328
342148
393634
394999
41282
44460
44830
44853
45750
46758
47685
48006
48816
5171
53883
54467
55527
6717
7726
98032

9937	
	Valid Responses 56
	Total Responses 58

3. Year of graduation from ELI:
(Respondents were limited to brief text responses)

Response	20% 40% 60% 80% 100%	Frequency	Count
2013		29.5%	13
2014		34.1%	15
2015		36.4%	16
		Valid Responses	44
		Total Responses	45

4. The ELI Fellowship has enabled me to assume new leadership roles in academic administration.
(Respondents could only choose a single response)

Response	20% 40% 60% 80% 100%	Frequency	Count
Strongly Disagree		8.8%	5
Disagree		8.8%	5
Agree		29.8%	17
Strongly Agree		52.6%	30
Not Answered			1
		Valid Responses	57
		Total Responses	58

6. The ELI Fellowship has enabled me to assume new leadership roles at the national, state, and/or local level of the profession.

(Respondents could only choose a single response)

Response	20% 40% 60% 80% 100%	Frequency	Count
Strongly Disagree		3.5%	2
Disagree		29.8%	17
Agree		29.8%	17
Strongly Agree		36.8%	21
Not Answered			1
		Valid Responses	57

Total Responses	58
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8. The ELI Fellowship has enabled me to assume new advocacy roles.
(Respondents could only choose a single response)

Response	20%	40%	60%	80%	100%	Frequency	Count
Strongly Disagree						0.0%	0
Disagree						25.0%	14
Agree						50.0%	28
Strongly Agree						25.0%	14
Not Answered							2
Valid Responses							56
Total Responses							58

10. The ELI Fellowship has enabled me to assume new interprofessional leadership roles.
(Respondents could only choose a single response)

Response	20%	40%	60%	80%	100%	Frequency	Count
Strongly Disagree						3.5%	2
Disagree						24.6%	14
Agree						35.1%	20
Strongly Agree						36.8%	21
Not Answered							1
Valid Responses							57
Total Responses							58

12. The ELI Fellowship has enabled me to participate in new initiatives within the profession (public discourse).
(Respondents could only choose a single response)

Response	20%	40%	60%	80%	100%	Frequency	Count
Strongly Disagree						1.9%	1
Disagree						35.2%	19
Agree						44.4%	24
Strongly Agree						18.5%	10
Not Answered							3

Valid Responses	54
Total Responses	57

14. The ELI Fellowship has enabled me to participate in new initiatives within my academic institution (change agent).

(Respondents could only choose a single response)

Response	20%	40%	60%	80%	100%	Frequency	Count
Strongly Disagree						1.8%	1
Disagree						5.3%	3
Agree						38.6%	22
Strongly Agree						54.4%	31
Valid Responses						57	
Total Responses						57	

16. The ELI Fellowship has enabled me to become more involved in the in mentorship/empowerment of others.

(Respondents could only choose a single response)

Response	20%	40%	60%	80%	100%	Frequency	Count
Yes						98.2%	56
No						1.8%	1
Valid Responses						57	
Total Responses						57	

18. The ELI Fellowship has had a positive effect on my current role.

(Respondents could only choose a single response)

Response	20%	40%	60%	80%	100%	Frequency	Count
Strongly Disagree						0.0%	0
Disagree						1.8%	1
Agree						7.1%	4
Strongly Agree						91.1%	51
Not Answered							1
Valid Responses						56	
Total Responses						57	

20. The ELI Fellowship provided the knowledge and skills I needed for my current role.
(Respondents could only choose a single response)

Response	20%	40%	60%	80%	100%	Frequency	Count
Strongly Disagree						0.0%	0
Disagree						1.9%	1
Agree						18.5%	10
Strongly Agree						79.6%	43
Not Answered							3
Valid Responses							54
Total Responses							57

22. The ELI Fellowship has enhanced my ability to think strategically.
(Respondents could only choose a single response)

Response	20%	40%	60%	80%	100%	Frequency	Count
Strongly Disagree						0.0%	0
Disagree						0.0%	0
Agree						29.8%	17
Strongly Agree						70.2%	40
Valid Responses							57
Total Responses							57

24. The ELI Fellowship has enhanced my understanding of the context in which my program operates.
(Respondents could only choose a single response)

Response	20%	40%	60%	80%	100%	Frequency	Count
Strongly Disagree						0.0%	0
Disagree						3.5%	2
Agree						21.1%	12
Strongly Agree						75.4%	43
Valid Responses							57
Total Responses							57

26. Concepts learned throughout the ELI Fellowship have transformed what I do.
(Respondents could only choose a single response)

Response	20%	40%	60%	80%	100%	Frequency	Count
Strongly Disagree						1.8%	1
Disagree						0.0%	0
Agree						29.8%	17
Strongly Agree						68.4%	39
Valid Responses							57
Total Responses							57

28. I have continued to network with other members of the ELI Fellowship.
(Respondents could only choose a single response)

Response	20%	40%	60%	80%	100%	Frequency	Count
Yes						94.7%	54
No						5.3%	3
Valid Responses							57
Total Responses							57

30. I implemented what I learned in curricular content in my work.
(Respondents could only choose a single response)

Response	20%	40%	60%	80%	100%	Frequency	Count
Yes						94.7%	54
No						5.3%	3
Valid Responses							57
Total Responses							57

32. I have been successful in achieving my professional leadership development plan outlined during the ELI Fellowship.
(Respondents could only choose a single response)

Response	20%	40%	60%	80%	100%	Frequency	Count
Yes						85.7%	48
No						14.3%	8
Not Answered							1

Valid Responses	56
Total Responses	57

33. The ELI Fellowship has helped me identify strengths and weaknesses in my leadership style.
(Respondents could only choose a single response)

Response	20%	40%	60%	80%	100%	Frequency	Count
Strongly Disagree						1.8%	1
Disagree						0.0%	0
Agree						12.5%	7
Strongly Agree						85.7%	48
Not Answered							1
Valid Responses							56
Total Responses							57

35. The ELI Fellowship has enabled me to refine my leadership styles across the four dimensions presented by Bolman and Deal.
(Respondents could only choose a single response)

Response	20%	40%	60%	80%	100%	Frequency	Count
Strongly Disagree						1.8%	1
Disagree						1.8%	1
Agree						24.6%	14
Strongly Agree						71.9%	41
Valid Responses							57
Total Responses							57

37. The leadership project had a meaningful impact on my organization.
(Respondents could only choose a single response)

Response	20%	40%	60%	80%	100%	Frequency	Count
Strongly Disagree						1.8%	1
Disagree						3.6%	2
Agree						50.9%	28
Strongly Agree						43.6%	24
Not Answered							2

Valid Responses	55
Total Responses	57

39. The leadership project provided me the opportunity to apply the leadership skills I developed as a result of the ELI Fellowship.

(Respondents could only choose a single response)

Response	20%	40%	60%	80%	100%	Frequency	Count
Strongly Disagree						1.8%	1
Disagree						1.8%	1
Agree						31.6%	18
Strongly Agree						64.9%	37
Valid Responses						57	
Total Responses						57	

42. I would recommend the Education Leadership Institute Fellowship to others.

(Respondents could only choose a single response)

Response	20%	40%	60%	80%	100%	Frequency	Count
Strongly Disagree						1.8%	1
Disagree						0.0%	0
Agree						12.3%	7
Strongly Agree						86.0%	49
Valid Responses						57	
Total Responses						57	

44. How likely are you to seek/remain in a leadership position in physical therapy education over the next 2 years?

(Respondents could only choose a single response)

Response	20%	40%	60%	80%	100%	Frequency	Count
Very unlikely						1.8%	1
Unlikely						0.0%	0
Likely						10.5%	6
Very likely						87.7%	50
Valid Responses						57	

Total Responses	57
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1 [Unit – Practice and Education; Program 60 – Academic/Clinical Education Affairs; Staff – J. Gandy; B of D
2 8/10; Staff Report]

3 4 **REPORT ON THE STEERING COMMITTEE FOR THE EDUCATION LEADERSHIP INSTITUTE**

5
6 **CHARGE:** The purpose of this report is to provide an interim summary of the ongoing work of the Steering
7 Committee for the Education Leadership Institute (ELI) as a collaborative initiative between the American
8 Physical Therapy Association, Education Section, Academic Administrator Special Interest Group (AASIG/
9 future ACAPT) and PTA Special Interest Group (PTA SIG) and to provide several recommendations prior to
10 implementing this program in 2011.

11
12 **RECOMMENDATION 1:** That the Steering Committee for the Education Leadership Institute be renamed the
13 Education Leadership Institute Committee with responsibilities for the ongoing oversight and management,
14 implementation, and evaluation of the Education Leadership Institute (ELI) to include the applicant review
15 process, curriculum content and revision, selection of faculty, mentors, and facilitators/moderators, conducting
16 outcomes assessments, and establishing and interpreting policies and procedures.

17
18 **SS:** With the implementation of ELI, a standing committee will be required to maintain and oversee ELI with
19 responsibilities to ensure that the curriculum remains current and relevant to contemporary issues in higher
20 education leadership, program applicants are reviewed annually for acceptance into ELI, qualified faculty
21 members are invited to teach in the online and face-to-face components of the program, mentors with the
22 desired attributes, qualifications, and training are invited to work with program participants, and relevant
23 outcomes are assessed related to the participants, the program, the academic organization, and the
24 profession.

25
26 **RECOMMENDATION 2:** That the Education Leadership Institute Committee be comprised of seven (7)
27 persons and an APTA staff liaison with representation from the Education Section, PTA SIG, AASIG,
28 academic faculty member, higher education (non-physical therapy), Academic Administrator (PT and PTA),
29 and Education Leadership Institute (ELI) program mentor with staggered 3-year terms beginning in 2011,
30 where the current composition of this group would serve as the first appointed Committee.

31
32 **SS:** The current Steering Committee for ELI consists of seven persons with broad representation from higher
33 education including experienced PT and PTA program directors and experienced faculty, Education Section,
34 AASIG, and PTA SIG representation, physical therapist representing higher education administration, and
35 non-physical therapy representative with involvement in another health profession's leadership program and
36 in higher education leadership and administration. The current configuration has allowed the Steering
37 Committee to make informed decisions across a broad spectrum of issues associated with the development,
38 implementation, and assessment of this program initiative that otherwise may not have been feasible given a
39 different configuration. In addition, to further the collaborative effort between APTA and the Education
40 Section and its relevant SIGs, this model has been most beneficial in ensuring that all perspectives are
41 considered in the decision-making process.

42
43 **RECOMMENDATION 3:** That the graduates of the Education Leadership Institute be named "Fellows of the
44 Education Leadership Institute".

45
46 **SS:** As a part of the Steering Committee's background research, a review was conducted of other health
47 professions' education leadership programs. In many cases (ie, American Dental Education Association,
48 American Association of Colleges of Pharmacy, Executive Leadership in Academic Medicine, and Family
49 Medicine within the American Council on Education program) the graduates of these programs were called
50 Education Leadership Fellows. The Steering Committee is cognizant that within physical therapy, the
51 Catherine Worthingham Fellows (CWF) historically has used the term "Fellow of the American Physical
52 Therapy Association (FAPTA)". In fact, three of the members of the Steering Committee are currently
53 FAPTA's. In the case of this program, the term Fellow of the Education Leadership Institute would be
54 required to be used in its entirety to minimize any possible confusion between these very different groups. In
55 addition, this program is on the August agenda of the American Board of Physical Therapy Residency and
56 Fellowship Education (ABPTRE) for credentialed clinical residency and fellowships to determine if ELI meets
57 the criteria to be considered for a credentialed clinical fellowship where graduates of the program could earn
58 the title of an ELI Fellow.

59

REPORT: The Steering Committee for ELI met at APTA headquarters on October 26-27, 2009, January 28-29, 2010, and July 15-16, 2010 and via conference call on June 1, 2009 and May 26, 2010. This group also conducts its ongoing business using a SharePoint Community. Members of the Steering Committee on the Education Leadership Institute include Martha Ferretti, PT, MPH, FAPTA (Program Director), Margaret Plack, PT, EdD (Interim Senior Associate Dean for the Health Sciences Program), Michael Emery, PT, EdD, FAPTA (Program Director), Michael Pagliarulo, PT, EdD (Former Program Director and currently academic faculty member), Susan Nelson, PT, MS (PTA Program Director), Beth Domholdt, PT, PhD, FAPTA (Vice President for Academic Affairs), and Lois Nora, MD, JD (Emeritus President and Dean). The development of an Education Leadership Institute was based on a needs assessment conducted by the Consultant Group on ELI in 2008 and provided to the Board of Directors in a report in 2009 (Report on Consultant Group on the Education Leadership Institute (ELI), Staff Report, J Gandy, 8/09).

This report will first provide a broad context for understanding the constructs associated with the Education Leadership Institute (philosophy, mission, goals) followed by highlights of key components of ELI, including its infrastructure (length, target audience, delivery design, curriculum content, program calendar), proposed outcomes assessments (subject to ongoing development by the Steering Committee and external consultant) and marketing and communications.

Core Philosophy

An Education Leadership Institute will...

- Prepare physical therapist program directors and physical therapist assistant program directors to meet contemporary education leadership needs through strategic and forward thinking and by leading change in higher education.
- Affect not only new program directors and new faculty in the profession, but may also include clinicians (eg, clinical residency and fellowship leadership) interested in pursuing academic leadership positions.
- Be sufficiently broad to allow participants, regardless of their role, to benefit from leadership training and likewise be flexible enough to meet the tailored objectives and needs of the participant to facilitate application of the concepts learned to their specific contextual environments.

Mission of the Educational Leadership Institute

Develop innovative and influential leaders in physical therapy (PT and PTA) education who can function within a changing politico-socio-cultural environment. To achieve this mission the ELI will be:

- oriented toward leadership in the broadest context,
- designed to meet contemporary education leadership needs with an eye toward the future,
- provided across all levels of educators, not just program directors, including academic and clinician educators, and
- targeted toward higher education culture.^{1,2}

Goals of the Education Leadership Institute

The Education Leadership Institute will develop core faculty members and program directors with the necessary leadership skills to:

- Facilitate change and improvement in the academic environment of the 21st century.
- Think strategically to creatively implement solutions in education to respond to changes in health care and society.
- Engage in public discourse that advances the physical therapy profession.

Goal Implementation

The Education Leadership Institute will:

- Design a program (including content, format, and structure) based on responses from the 2008 education community needs assessment that addressed the current and future needs of the profession and the education community.
- Design a program that will allow participants to connect theory with practice to enable direct application of knowledge learned through the Institute to their everyday practice.
- Facilitate the development of future mentors.
- Provide a mentoring component for participants.

¹Searle NS, Hatem CJ, Perkowski L, Wilkerson L. Why invest in an educational fellowship program? *Academic Medicine*. 2006; 81(11):936-940.

1
2 ²Korschum HW, Redding D, Teal GL, Johns MME. Realizing the vision of leadership development in an
3 academic health center: The woodruff leadership academy. *Academic Medicine*. 2007; 82(3):264-271.

4 5 **ELI Program Infrastructure**

6 7 Program Length

- 8 • The first year of the program will begin with an Orientation in July 2011 and the program will end July
9 2012. There will be an optional alumni event for ELI graduates held October 2012 concurrent with the
10 Education Section's fall Education Leadership Conference. This cycle will repeat annually.

11 12 Program Applicants

13 This program will entail an application process for participants where the eligibility requirements include:

- 14 • A preference to aspiring and novice academic administrators (0-7 years) given a sense of urgency to
15 prepare current and future academic administrators.
- 16 • Current membership in APTA.
- 17 • U.S. licensure/registered/certified or licensure eligible (exception for PTAs in Hawaii and Colorado)

18 19 Application Process

20 There will be a formal participant application process that will be reviewed by the Education Leadership
21 Institute Committee (refer to Recommendation 2) based on a set of established criteria. The Education
22 Leadership Institute Committee will extend invitations to those participants who have been determined to
23 meet the criteria as well as notifying those individuals who were not accepted. The application will require the
24 following items:

25 26 *For the Applicant*

- 27 • Demographic Information about the applicant (name, address, phone, email, fax, title, degrees,
28 current position and for how long, etc)
- 29 • Curriculum Vitae to include evidence of past leadership experiences
- 30 • Statement of Commitment to the ELI Program
- 31 • Letter of Intent addressing past leadership/management challenges and successes, future leadership
32 goals, anticipated contributions to the participant's academic institution through a leadership project
33 and to ELI.

34 35 *For the Institution*

- 36 • Nomination by the participant's Dean/Administrative Supervisor (using a standardized nomination
37 form)
- 38 • Institution Statement of Commitment to support (tuition, fees, time, and other costs) the applicant
39 during a yearlong program and in a leadership project that responds to a problem/issue/need with the
40 applicant's academic institution.

41 42 Program Size

- 43 • A limited number of participants will be accepted annually within ELI (targeting 25-30 annually) that
44 will complete the program as a cohort.
- 45 • Provide for six (6) mentors who are experienced PT and PTA program directors that model and
46 uphold defined mentor attributes and qualifications. In the program, 2 mentors will be paired with a
47 group of 10 participants.
- 48 • Provide for smaller cohorts to build a successful program model and to ensure quality mentoring and
49 strong participant networking throughout the program and in the future.

50 51 Networking and Building Cohort Communities

52 To facilitate and build a strong cohort community of program participants, several methods will be used
53 throughout the program.

- 54 • Online cyber communities (ie, ELI Participant SharePoint Community) to permit asynchronous
55 communication, sharing of ideas and resources, and prompting discussion.
- 56 • Face-to-face sessions that permit ongoing and direct exchange of ideas during three on-site
57 sessions.

- Mentoring and coaching provided by qualified mentors that are assigned in pairs to subgroups of 10 participants to facilitate virtual discussions among participant subgroups, using audio and videoconferencing and electronic communication, throughout the year.

Education Component Provided Through Blended and Facilitated Learning

Program Orientation

- Once participants are accepted into the program, a two-hour orientation through videoconferencing will provide an orientation to the roles and responsibilities of faculty, mentors, moderators, and program participants.
- An overview of the yearlong curriculum and the expectations of program participants including the institutional leadership project based on a problem/situation and personal leadership development plan will be addressed.
- Participants will have an opportunity to “meet” each other, all of the mentors and those assigned to their subgroup, program moderator, and APTA staff liaison.
- An orientation to the APTA Learning Center will be provided to ensure all participants know how to access and complete the online education component.

Online Education Component

- Participant cohorts (25-30) complete a series of nine (9) online modules that include curricular content, case-based situations, reading resources, and application assignments. These nine courses will be implemented through the APTA Learning Center and extend throughout the yearlong program. The nine program modules that comprise the online learning component of ELI, with oversight responsibility for the curriculum provided by the Education Leadership Committee, currently include:
 - Module 1: Personal Leadership and Management
 - Module 2: Higher Education, Healthcare Systems and Society
 - Module 3: Institutional Leadership and Management
 - Module 4: Resources/Financial Management
 - Module 5: Legal Issues
 - Module 6: Student Affairs
 - Module 7: Human Resource Management
 - Module 8: External/Internal Relationships, Influence, and Partnerships
 - Module 9: Program Development and Outcomes Assessment
- Faculty with the content expertise required for the nine modules will be drawn from primarily outside of physical therapy to enable learners to broaden their perspective and understanding of leadership within the context of higher education. The module content will be applied directly to physical therapy situations during mentor sessions.
- Program content provided in the online modules is coordinated with the face-to-face components where learned content is subsequently integrated into real life situations and problems with support and guidance offered by mentors.
- Integration of program content, as applied to the roles and responsibilities of Academic Administrators, will be provided by highly experienced mentors who are physical therapist and physical therapist assistant academic administrators, leaders, and positive role models.
- Participants will receive CEUs for each of the modules completed in the online education component.

Face-to-Face Education Component

- All participants will be required to attend the three face-to-face education components that are sequenced in relation to the online education component and where the fourth session is an optional alumni event.
- The first face-to-face session will be convened at the fall Education Section (AASIG/Clinical Education SIG) Education Leadership Conference to facilitate the collaborative relationship with this initiative and enable the ELI cohort to attend the Education Leadership Conference. This design also helps to facilitate the integration of ELI participants within the Education Section, PTA SIG and AASIG to further their leadership development.
- The second and third face-to-face meetings will occur in a separate retreat format independent of other conferences.

- The final optional face-to-face session for the cohort will occur at the fall Education Leadership Conference where program alumni will be recognized with a reception and will have an opportunity to meet the next new cohort beginning ELI.
- Face-to-face sessions provide an opportunity for participants to engage with faculty and mentors about the curriculum content for further clarification and elaboration. These sessions focus primarily on connecting theory with practice to enable direct application of knowledge learned through the Institute to participant's every day practices and through networking with their colleagues.
- Participants will receive CEUs for each of the face-to-face training components.
- A timeline is provided in Appendix A that depicts the yearlong program and the timing for the orientation, online and face-to-face components, and alumni event.

ELI Mentors

One of the critical components of ELI is the availability of mentors with demonstrated expertise and leadership as academic administrators for physical therapist and physical therapist assistant programs. The roles and responsibilities of mentors in ELI include:

- Assignment to specific participants within the same cohort who can access the mentors throughout the yearlong program.
- A total of six mentors that are each paired with 10 participants per group (2 mentors per group of 10), assuming a cohort of 30 participants.
- Participation in the three face-to-face sessions.
- Familiarity with the curricular content and related assignments with access to participant discussion board communication to be appraised of ongoing discussion threads.
- Participation in the SharePoint Community discussion board outside of the online and face-to-face sessions to prompt active reflection and questions, to facilitate integration of theory with daily practice, to respond to questions, and to build a cyber community.
- Pairing of mentors to assure that participants are provided a mentor of similar academic program level (PT versus PTA).
- Additional roles and responsibilities as identified in the Mentor Guide.

ELI Moderator(s)/On-Site Coordinator(s)

The role and responsibilities of the moderator(s)/coordinator(s) is distinctive from the mentors and includes:

- Organization of the structure of the face-to-face sessions.
- Identification of key follow up questions to facilitate participant discussion during the face-to-face education component, based on participants' written assignments during the online education component.
- Facilitation of questions for the large group plenary sessions and summaries of small group discussions to further advance learning.
- Facilitation of the development and discussion of case-based scenarios and role-play practice situations.
- Connection of the curricular content from the online modules through large group plenary discussions.

ELI Program Completion

- Participants completing the program will be graduates of ELI with the title of Fellows of the Education Leadership Institute (refer to Recommendation 3).
- Graduates will receive a "Certificate of Completion".
- Graduates are eligible to become future mentors in ELI, pending additional experience in the role of an Academic Administrator.
- Graduates of ELI would be widely promoted and published through such vehicles as the APTA and Education Section Websites, *PT News Now*, Education Section Newsletter, etc.
- Should participants desire to receive academic credit for completing ELI, they will be responsible for exploring options with a specific academic institution.
- ELI will be explored on the August agenda of APTA's Clinical Residency and Fellowship Committee as a possible APTA Credentialed Clinical Fellowship in Education Leadership.

Participant Outcome Projects

Specific outcomes for ELI participants include:

1 *Learning Project Based on a Problem/Situation or Unmet Need*

- 2 • Development, refinement, and implementation of a learning project that is relevant to the needs of the
- 3 participant's academic institution that facilitates the resolution of an issue/need within the supporting
- 4 academic institution.
- 5 • Involvement of the academic institution's leadership with the participant's learning project throughout
- 6 ELI. This project may or may not be fully realized by the completion of ELI and may continue beyond
- 7 the year long curriculum.
- 8 ○ The academic institution's leadership supervisor is required to sign off on the leadership
- 9 project.

10 *Professional Leadership Development Plan*

- 11 • Throughout ELI, participants will develop and refine a professional leadership development plan.
- 12 • Implementation of the professional leadership development plan will begin with the support of the
- 13 academic institution and ELI mentors.
- 14 • Completion of participant self-assessments with respect to personal leadership (eg, 360
- 15 assessments).
- 16 • Development of a strong network among the cohort of participants involved in ELI.

17 *Integration of Education Leadership Concepts*

- 18 • Advancement of knowledge, skills, and behaviors associated with leadership in higher education and
- 19 as applied to physical therapy and in daily practice.
- 20 • Advancement of the learning project and the professional leadership development plan as a result of
- 21 the application and integration of curricular content.
- 22 • Use of a theoretical framework for leadership based primarily on the work of Bolman and Deal who
- 23 incorporate concepts related to structural, human resource, symbolic, and political leadership.

24 Research Outcomes/Assessments

25 Although the formative outcomes assessments are currently under development, the components of ELI that

26 will be assessed include the following:

- 27 • Participant outcomes achieved upon graduation as defined by the Education Leadership Institute with
- 28 longitudinal follow up over several years.
- 29 • ELI program outcomes based on its vision, mission, and goals.
- 30 • Academic institution outcomes as related to the ELI graduate in support of the academic institution
- 31 and the learning project.
- 32 • Advancement of physical therapy leadership in higher education outcomes and the fulfillment of
- 33 physical therapist and physical therapist assistant academic administrator positions. ELI graduates
- 34 will be assessed at specific time frames before, during, and after the program to determine to what
- 35 extent the program has supported their future in physical therapy higher education.
- 36 • Development of a database that allows for ease of data input and extraction to generate outcomes
- 37 data and reports as well as harvesting qualitative data that explore more in-depth questions about
- 38 participants, learning, and other areas for future research.

39 Marketing and Communication

40 Marketing and communication aspects of the program have been developed to generate an interest in the first

41 cohort applying to the program. The components that will be addressed in communications and promotional

42 materials include the following:

- 43 • Promote ELI as a selective process with application criteria and a nomination process.
- 44 • Promote the vision, mission, and goals of ELI.
- 45 • Promote the graduates of ELI as alumni with a structure for their ongoing communication and continued
- 46 networking.
- 47 • Provide for a "graduation/alumni event" to recognize, showcase, and celebrate ELI fellows as future
- 48 academic leaders and as a part of the Education Section's, Education Leadership Conference.
- 49 • Promote the outcomes of ELI, once outcomes assessments have been performed.
- 50 • Create a logo/brand for ELI to be consistently used on all program related and promotional materials.
- 51 • Develop an ELI website to promote the program at the 2010 Education Leadership Conference to provide
- 52 information about ELI and its program components, expectations of program participants, application

- 1 materials, program costs, role of mentors, and a description of leadership project and leadership
2 development plan.
- 3 • Create a promotional item that includes the link to the ELI website to be shared with all ELC participants.
 - 4 • Promote the ELI shared collaborative with the Education Section, AASIG, PTA SIG, and APTA as a
5 positive working relationship and model.
- 6

7 2011 Budget

8 Expenses and revenues anticipated for the development, implementation, and evaluation of ELI are included in the
9 proposed Program 60-Academic/Clinical Education Affairs budget for 2011.

10
11 **Next Meeting:** Conference Call: August 25, 2010; 4:30 – 6:00 PM EDT

12
13 **STAFF:**

14 Jody Gandy, PT, DPT, PhD, Academic Clinical Education Affairs

15 Ken Harwood, PT, PhD, CIE, VP Practice and Education Unit

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APPENDIX A

Education Leadership Institute Overview

July 2011	August 2011	Sept 2011	October 2011	Nov 2011	Dec 2011	Jan 2012	Feb 2012	March 2012	April 2012	May 2012	June 2012	July 2012	October 2012	
1 st Cohort: Orientation to ELI Video-conference (2 hours)														
Complete Online Modules 1, 2, and 3 in the APTA Learning Center			First Cohort: 1 st Face-to-Face Session before ELC (1.5 days)											
		Complete online Modules 4, 5, 6, and 7 in the APTA Learning Center						2 nd Face-to-Face session (2 days)						
											Optional: Conf call or meet PT '2012 (2 hrs)			
								Complete Modules 8 and 9 in the APTA Learning Center			3 rd Face-to-Face Meeting (2 days)			
												2 nd Cohort: Orientation to ELI (2 hours)	1 st Alumni Event	
													2 nd Cohort: 1 st Face-to-Face Session	

4

ELI Fellowship Work Group Responsibilities

Thank you for previously expressing an interest in contributing to the Education Leadership Institute (ELI) Fellowship! Information is provided below to assist you in better understanding the responsibilities of the ELI Fellowship Work Group.

PURPOSE: The Education Leadership Institute (ELI) Fellowship Work Group is responsible for the ongoing oversight and management, implementation, and evaluation of the program to include the applicant review process; curriculum content and revision; selection of faculty, mentors, and facilitators/moderators; conducting outcomes assessments; and establishing and interpreting policies and procedures. (B of D, V-3, 8/31/10)

TASKS:

1. Facilitate ongoing and effective collaborative relationships with the Education Section, Academic Council, PTA Educators SIG, and APTA in creating, managing, implementing, and evaluating the Education Leadership Institute.
2. Develop and maintain a policy and procedure manual for the Education Leadership Institute to include program vision, mission, goals, and purpose, and related program documentation (ie, nominee and participant applications, applicant review and selection criteria, mentor characteristics and selection criteria, mentor manual, outcome assessments, certificate of completion, program logo, etc).
3. Periodically review established criteria for program applicants and nominees, faculty, mentors, facilitator/moderator, and committee qualifications.
4. Periodically review, assess, and modify the curriculum and its content (online and face-to-face components) to ensure that information is contemporary and forward-looking to addresses critical issues and needs of physical therapy academic administrators within higher education and health care.
5. Periodically review outcomes assessment tools to ensure that essential data is being systematically collected about participants, program content, curriculum, and faculty, mentors, and impact on physical therapy education and the profession.
6. Participate in scholarly activities related to the Education Leadership Institute to contribute to the literature and for use in intermediate and long-range strategic program planning.
7. Address administrative functions associated with the Education Leadership Institute including management of data and relevant databases, program communications and marketing, alumni communications and ongoing networking, etc.
8. Assess the ongoing fiscal viability of the Education Leadership Institute and make recommendations for change accordingly.

WORK GROUP MEMBERS: The ELI Fellowship Work Group consists of 6 individuals who each represent a stakeholder group that is involved with or impacted by the ELI Fellowship program. Members typically serve a 3-year term. An individual who is elected to a board position on ACAPT is not permitted to also serve on the ELI Fellowship Work Group.

- Senior program director leadership
- PTA program director and PTA Education SIG representative
- Residency or fellowship program director
- ELI Fellow and program director
- External (non-physical therapy) member with expertise in leadership

MEETINGS: A calendar of annual web conferences and meetings for the work group are noted below to assist you in better understanding the commitment involved. Additional calls may be scheduled throughout the year, as needed.

- 2-day onsite meeting at APTA to review all cohort and longitudinal assessments, curriculum and online modules, admissions survey, application processes, website and marketing, future directions and initiatives, etc. Work group member participation is mandatory. APTA would cover your travel expenses to attend this meeting.
- 1.5 hour conference call in November or December to review the March onsite session and associated documentation.
- 2.0 hour conference call in February or March to review ELI applications for next cohort. Work group members must review the application materials for each applicant using a standard rubric prior to the call.
- 1.5 hour conference call in April to review 3rd ELI onsite session agenda and associated documentation, as well the July orientation webinar and related documentation for the new cohort.