

Better Together

How to Start & Maintain a
Fieldwork Consortium

Learning Objectives

At the end of this presentation, participants will be able to:

1. Understand the benefits of involvement with a FW consortium
1. Explain the purpose, function, leadership roles, and organizational structure of a FW consortium
1. Articulate the importance of a mission and vision for a consortium
1. Explore potential opportunities for collaboration in their geographical area

This presentation represents one example of a FW consortium, as there are multiple consortia representing their geographical area across the US



I can do things you cannot.
You can do things I cannot.
Together we can do
great things.

-Mother Teresa

@weareteachers

NEOTEC

New England Occupational Therapy Education Council, Inc.

- A 501(c)(3) nonprofit corporation
- 29 member schools from the New England region
- Membership includes:
 - Academic Fieldwork Coordinators: OTA, MSOT, & OTD
 - 2 FWE OT/OTA Practitioner Representatives
 - Open invitation to Capstone Coordinators (DEC) in development



NEOTEC

Supporting and Promoting OT & OT Education

- NEOTEC members bring a broad range of credentials, specialties, and accomplishments
- Example contributions:
 - Publications in AJOT, OJOT, JOTE, OT Practice, Slack Inc.
 - Leadership roles in state and national professional organizations
 - ACOTE Board Member and Roster of Accreditation Evaluator
 - AOTA Roster of Fellows
 - Multiple AOTA FWE Certificate Workshop Instructors & Educators
 - Multiple presenters at state, national, and international OT conferences
 - Interprofessional collaboration and conference presentations

History

- The New England Council began during the 1958-59 school year. It was started by Frances Carr (from Tufts University-Boston School of Occupational Therapy) and Anne Henderson (UNH)
- **Purpose:** to share concerns and to communicate about fieldwork issues
 - Council met 1x/year
 - The two schools alternated responsibility for the meeting, holding potluck dinners and even lobster parties (courtesy of Elaine Dixey from Concord State Hospital) for clinicians and fieldwork coordinators
- As occupational therapy and occupational therapy assistant schools began in New England, they were invited to join. There are now 29 member schools!

Current Mission & Vision

- **MISSION:** We facilitate communication and collaboration among educators, practitioners, students, and other stakeholders to enhance the quality of occupational therapy education.
- **VISION:** To maximize the value, quality, and purpose of experiential education.

Executive Board & Committee Chairs

- **Co-Chairs** (one OT & one OTA program) -
 - *Erin Connor*, Quinsigamond Community College
 - *Michael Salemi*, Western New England University
- **Treasurer** - *Ryan Whitney*, Tufts University
- **Secretary** - *Carey Leckie*, Springfield College
- **Membership Chair** - *Michelle Forfa*, University of Hartford
- **Website & Social Media Chair** - *Michael Salemi*, Western New England University
- **FWE OT/OTA Practitioner Representatives** -
 - *Alissa Rivard*, OTA, Worcester Day Habilitation program
 - *Kelly Giaquinto*, OT, Medford Public Schools
- **Conference Committee Chair** - *Jean McCaffery*, Springfield College
- **Awards Committee Co-Chairs** -
 - *Courtney Taylor*, American International College
 - *Meredith Grinnell*, Tufts University

Purpose

- To facilitate communication among occupational therapy (OT) fieldwork and academic educators
- To enhance the quality of OT fieldwork education and supervision

Function

- To exchange ideas and resources, and to develop strategies to enhance fieldwork education and promote the OT profession
- To identify and respond to emerging fieldwork issues at a regional and national level
- To provide continuing education opportunities relevant to fieldwork

Promotion of FW Education & Information Exchange

- Quarterly Business Meetings
 - Consortium business, sharing information, conference planning, member support, etc.
- Website and social media presence
 - Resources, community connection
- Mentoring and support for AFWCs
- Collaboration amongst schools
 - Including support with ACOTE accreditation process
- Problem solving, ListServ involvement
- Disseminating information to FWE and practitioners
- Collective stances on FW issues (i.e. payment for Fieldwork)
- SSO / Fieldwork Data Form updates - streamlined documentation

Resources & Recognition for FWEs

- Provide FREE conferences and professional development opportunities
 - Annual in-person conference (full day)
 - Lunch & learn opportunities
 - Virtual learning options
 - Asynchronous education modules
- Fieldwork Educator appreciation night at AOTA 2023
- Fieldwork Educator ribbons distributed at AOTA 2023
- Sponsored AOTA Fieldwork Educator Certificate Workshop during COVID pandemic
 - 3 sponsorships per member school
 - Collaborated to ensure representation across as many fieldwork sites as possible

Misconceptions...

- ‘Isn’t there competition?’
- Stealing sites from one another
- Interpersonal conflict
- Time commitment
- Airing “dirty laundry”/ fears around confidentiality
- Myth of the perfect student: feeling concerned about discussing challenging student situations
- Only for troubleshooting / problems

Our experience...

- Collaborative!
 - Obtaining permission to share site specific objectives
 - Central repositories
 - Share successes and problem solve
- Time commitments very doable
- Support around challenges at sites
- ‘No judgment zone’ for discussing challenging student/site situations
- Not just for troubleshooting
 - Share & discuss interesting projects and research

Experience & Benefits

- Resource for support for new AFWCs
 - Haley Matussek, UNH
- Acknowledgements from FW sites on the benefits of NEOTEC
 - Butler Hospital Newsletter - *"After Karlynd and I attended the NEOTEC Conference at Springfield College earlier this summer, I felt inspired to explicitly explore the questions of: "How do we provide a safe learning environment for our students?" and "How can we keep doing this to the best of our abilities?"*
- Early COVID pandemic collaboration across MA schools to advocate for fast-tracking proposed changes to MA Practice Act to support emerging practice fieldwork
 - FWE collaborated with faculty to brainstorm, law changed August 2020

Starting a consortium

- Identify interested parties
- Research local laws and guidelines
- Meet and collaborate to
 - Select a consortium name
 - Develop mission & vision
 - Draft standard operating procedures / bylaws
 - Determine forms of income and set initial budget
 - Establish meeting schedule
 - Identify technology needs
- Invite membership
 - Consider perks for members (i.e. 1st year free)
- Elect initial officers & leadership

Starting a Consortium: Legal & Financial Considerations

- File articles of incorporation
- Apply to IRS for 501(c)(3) non-profit status
- Apply for tax exemption (IRS & state - If multi-state consider where to file)
- Open a bank account
 - Recommend two signers at all times for liability and role transitions
- Obtain P.O. Box for dues collection & tax mailings
- Create a system for budget tracking
 - Determine budget parameters and restrictions relative to mission and non-profit status
 - Outline systems to monitor budget and expenditures
 - Ensure transparency via treasurer report at each consortium meeting
- Vote standard operating procedures / bylaws into effect

Strategies for Maintaining a Consortium

- Implement Robert's Rules of Order to formalize meetings
- Periodically review and keep current Standard Operating Procedures / Bylaws
 - Change officers per protocol (filing paperwork per state requirements)
- Utilize a webmaster (~\$600 annually)
 - Highlight members and provide resources on website & social media
 - Platform for registration for conferences
- Utilize an accountant (~\$400 annually)
 - File taxes with Form 990 annually
- Credit card system for collecting dues
- Ensure access to a Zoom or Teams meeting account
- Shared drive for organizational transparency

Regular topics in NEOTEC meetings

- Treasurer report
- Approval of previous meeting minutes
- Recent updates from conferences
- ACOTE updates and recent experiences with ACOTE reports and site visits
 - NEOTEC has ACOTE site reviewers as members
- Fieldwork Educator support opportunities
 - Planning and implementing annual conference
 - Lunch & learn events
 - AOTA Fieldwork Educator Appreciation Night
- Discussing legislative changes
- New expansion of NEOTEC - Capstone Coordinators
- Round table discussions to share successes & problem solve current issues

Thank you

Look Us Up!

- NEOTEC website - <https://neotecouncil.org/>



- Facebook Group -

