

2024

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Recommended Citation

Stephenson, S. J., Ivy, C., Vonier, M., & Sweets, D. (2024). Building Bridges: A Mentor Education Program for Occupational Therapy Practitioners. *Journal of Occupational Therapy Education*, 8 (1). <https://doi.org/10.26681/jote.2024.080119>

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Abstract

Mentoring in occupational therapy is a crucial role that many practitioners undertake and there is a paucity of mentor education specific to occupational therapists. Authors present an innovative approach to mentor education through a novel three-part online mentor training series. Developed by faculty teaching at Northern Arizona University's (NAU) entry level Occupational Therapy Doctorate (OTD) program, the series incorporated adult learning theory and the stages of mentoring through the lens of occupational therapy. The training series received positive feedback from participants, who found it straightforward, relevant, and applicable to their work settings. Literature emphasizes the increasing demand for quality mentors in occupational therapy as the field expands and the need for mentor education to support professional development. Although there is limited literature on mentor support in occupational therapy, studies in related fields have highlighted the effectiveness of mentor training programs. Authors suggest that the establishment of a mentoring practice community can bridge OTD program expectations with clinical and community practice realities and build mentor capacities. Overall, this work emphasizes the significance of mentorship and the need for formal mentor education in occupational therapy to foster professional growth and ensure the availability of quality mentors for students and new professionals.

Keywords

Occupational therapy, mentorship, mentor education, practice scholar, doctoral capstone

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Acknowledgements

Authors wish to acknowledge the work by CIMER at the University of Wisconsin, Madison.



Volume 8, Issue 1

Building Bridges: A Mentor Education Program for Occupational Therapy Practitioners

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ABSTRACT

Mentoring in occupational therapy is a crucial role that many practitioners undertake and there is a paucity of mentor education specific to occupational therapists. Authors present an innovative approach to mentor education through a novel three-part online mentor training series. Developed by faculty teaching at Northern Arizona University's (NAU) entry level Occupational Therapy Doctorate (OTD) program, the series incorporated adult learning theory and the stages of mentoring through the lens of occupational therapy. The training series received positive feedback from participants, who found it straightforward, relevant, and applicable to their work settings. Literature emphasizes the increasing demand for quality mentors in occupational therapy as the field expands and the need for mentor education to support professional development. Although there is limited literature on mentor support in occupational therapy, studies in related fields have highlighted the effectiveness of mentor training programs. Authors suggest that the establishment of a mentoring practice community can bridge OTD program expectations with clinical and community practice realities and build mentor capacities. Overall, this work emphasizes the significance of mentorship and the need for formal mentor education in occupational therapy to foster professional growth and ensure the availability of quality mentors for students and new professionals.

Introduction

Healthcare professions, including occupational therapy, frequently use mentoring as a tool for teaching skills and to support professional development. Mentorship is a professional relationship where individuals work together over time to support the success and skill development of those involved (Houghton, 2016; Stephenson et al., 2022). Skill development, leadership development, and promotion of learning are three key foci within the mentee/mentor relationship (Doyle et al., 2019; Elmore et al., 2014; Houghton, 2016). The mentor relationship typically aligns experienced practitioners with early career healthcare providers and students to promote advancing skills, learning new practice areas, or assuming new roles in a clinic setting (Doyle et al., 2019; Elmore et al., 2014; Houghton, 2016; Kringle & Hoyt, 2020). This offers a variety of benefits to new employees, students, and organizations including socialization to a profession, fostering of professional behaviors, gaining of knowledge to sustain proficiency in skills, and development of professional relationships (Bradley-Levine et al., 2016; Johnson & Gabriel, 2017). Mentorship is critical in supporting personal and professional growth throughout the continuum of an occupational therapist's career from academic courses through late career (Deluliis & Bednarski, 2019; Kemp et al., 2022; Schoen et al., 2021).

Entry-level occupational therapy doctoral (OTD) programs require students to collaborate with mentors on a final capstone project and experience (Accreditation Council for Occupational Therapy Education® [ACOTE], 2018). ACOTE (2018) defined mentoring as “a relationship between two people in which one person (the mentor) is dedicated to the personal and professional growth of the other (the mentee). A mentor has more experience and knowledge than the mentee” (p. 51). However, there is a lack of occupational therapy focused resources to develop mentors at the professional level and to ensure mentors are prepared and able to carry out mentor roles with students (Rogers et al., 2022; Stephenson et al., 2022). Some OTD programs offer distinct mentor opportunities as part of the curriculum.

An example of a mentor-focused program, used in the Northern Arizona University (NAU) OTD program, is the practice scholar apprenticeship (PSA) program (Crist et al., 2005). The PSA program at NAU is a five-semester course of study where faculty or community mentors are paired with two to three students who support and learn from them in their research, program development, or quality improvement projects (Williamson et al., 2022). The founding chair of NAU's OTD program, Dr. Crist, brought the PSA program to NAU from another institution where the program was successfully implemented (Crist et al., 2005).

There is a need for formal mentor education, resources, and guidelines as occupational therapy programs ask practitioners and community partners to assume mentor roles with students (Kemp et al., 2020; Rogers et al., 2022). Occupational therapy programs, have a responsibility to provide education and support for those who choose to engage in mentor roles, through capstone mentoring or community partner-affiliated research projects (i.e., PSA; Rogers et al., 2022).

Background

Building on the success of an inaugural professional developmental series, faculty at NAU developed an archetype for mentor education that programs can use to provide mentor education and begin to meet the responsibility of support for community occupational therapy mentors willing to engage and collaborate with universities, programs, and students (Rogers et al., 2022). The first professional development training series, held in 2020, was created for fieldwork educators and capstone mentors. Following this initial course, participant feedback suggested there was a solid understanding of fieldwork as all occupational therapy practitioners (OTP) have experience with this from their own education experiences. However, participant feedback from the first course identified a need for further clarification of mentoring in capstone and PSA as these are not constructs that every OTP has experienced in their own education. Thus, a second training program was developed specifically to expand mentor education to community partners who mentor capstone and PSA students. The intended purpose of the training program was not only to build on concepts introduced in the inaugural training series designed for fieldwork educators, but also to provide specific education and guidance from the university faculty to the capstone and PSA student mentors.

Both the first mentor professional development series and the one described in this paper are grounded in adult learning theory. According to adult learning theory, learners tend to absorb material best through hands-on experience and reflection, which suggests that the traditional approach of lecture may not be the most effective way to teach concepts (Adriani et al., 2020; Knowles, 1984; Kolb, 1984). Instead, learners should be provided opportunities to apply new knowledge and skills in a practical setting (Kolb, 1984; Knowles, 1984; Kram, 1985). By blending experiential learning with the landmark mentoring work by Kram and colleagues (1985), which conceptualized mentoring in four sequential phases (initiation, cultivation, separation, redefinition), a professional development series held on a digital platform was created by NAU faculty for approaching mentoring education in occupational therapy.

The “7 principles of learning theory” was developed by Chickering and Gamson (1987) to guide effective teaching practices in higher education and can be used to help guide curricula for mentor education. The principles include encouraging active learning, creating a supportive learning environment, providing frequent feedback, emphasizing time on task, communicating high expectations, respecting diverse talents and ways of learning, and encouraging cooperation among learners (Chickering & Gamson, 1987). Research in the field of adult education underscores the importance of aligning mentor training with principles of effective learning and teaching. For example, Jowsey et al. (2020) found that online education that included active engagement and supportive environments were more likely to result in positive outcomes for participants. By emphasizing active learning and cultivating a supportive learning environment, mentor training prepares mentors with the necessary tools to effectively guide their mentees through the learning process (Bovill, 2019; Jowsey et al., 2020). The mentor training series was intentionally designed to incorporate these principles of adult learning theory, particularly in the orientation to new learning and self-directed components.

By emphasizing active learning and creating a supportive learning environment, mentors may be better equipped to guide mentees through the learning process. This paper showcases a mentor training program that was developed using principles from adult learning theory including: encouraging active learning, creating a supportive learning environment, providing frequent feedback, respecting diverse talents and ways of learning, and encouraging cooperation among learners (Chickering & Gamson, 1987; Kolb et al., 1984). In addition, the program integrated the stages of mentoring from Kram and colleagues (1985) including: initiation, cultivation, separation, and redefinition. It serves as a practical and effective model approach to mentor education (Pfund et al., 2016; Rogers et al., 2022).

Description of Mentor Training Program

This program was offered at no cost to participants and did not require a financial outlay on the part of the occupational therapy department. The training program was presented through three one-hour synchronous online course sessions that involved individual and group activities along with presentation of social science literature related to the topics. Group activities were inspired by, and in some cases adapted from, the mentorship education offerings, “Entering Mentoring and Facilitator Training for Entering Mentoring” led by the Center for the Improvement of Mentored Experience at the University of Wisconsin, Madison (Handelsman & Handelsman, 2009; Pfund, 2014; Pfund et al., 2015).

The event was promoted through the program's social media channels and via word of mouth, while relevant practitioners, including fieldwork educators, PSA, and capstone mentors, received informational emails. Authors collaborated with their state occupational therapy association for advertisement through email and social media for the event to expand the potential participant pool. Enrollment in each of the series was managed through an online event system (Eventbrite™). The registration process requested participants provide contact information, demographic information, job title, area of practice, and select topic(s) of interest for future training courses. Enrolled participants received a link to a cloud-based folder containing self-study and preparatory work. Each of the course sessions included an hour of preparatory work and a course evaluation survey.

After each course session, participants were required to complete a course evaluation via the online survey management system Qualtrics™. The anonymous course evaluation included an attestation that they would complete the self-study and preparatory work, attendance in the live virtual event hosted on Zoom™, and an assessment of achieved learning objectives. Upon survey submission, participants received certificates electronically through Qualtrics™, which listed the earned professional development units. The sections below describe each course session that was presented. Figure 1 includes an example of how and where the stages of mentoring were included. Table 1 includes an example of how the principles of adult learning theory were integrated (Chickering & Gamson, 1987; Kolb et al., 1984; Kram et al., 1985).

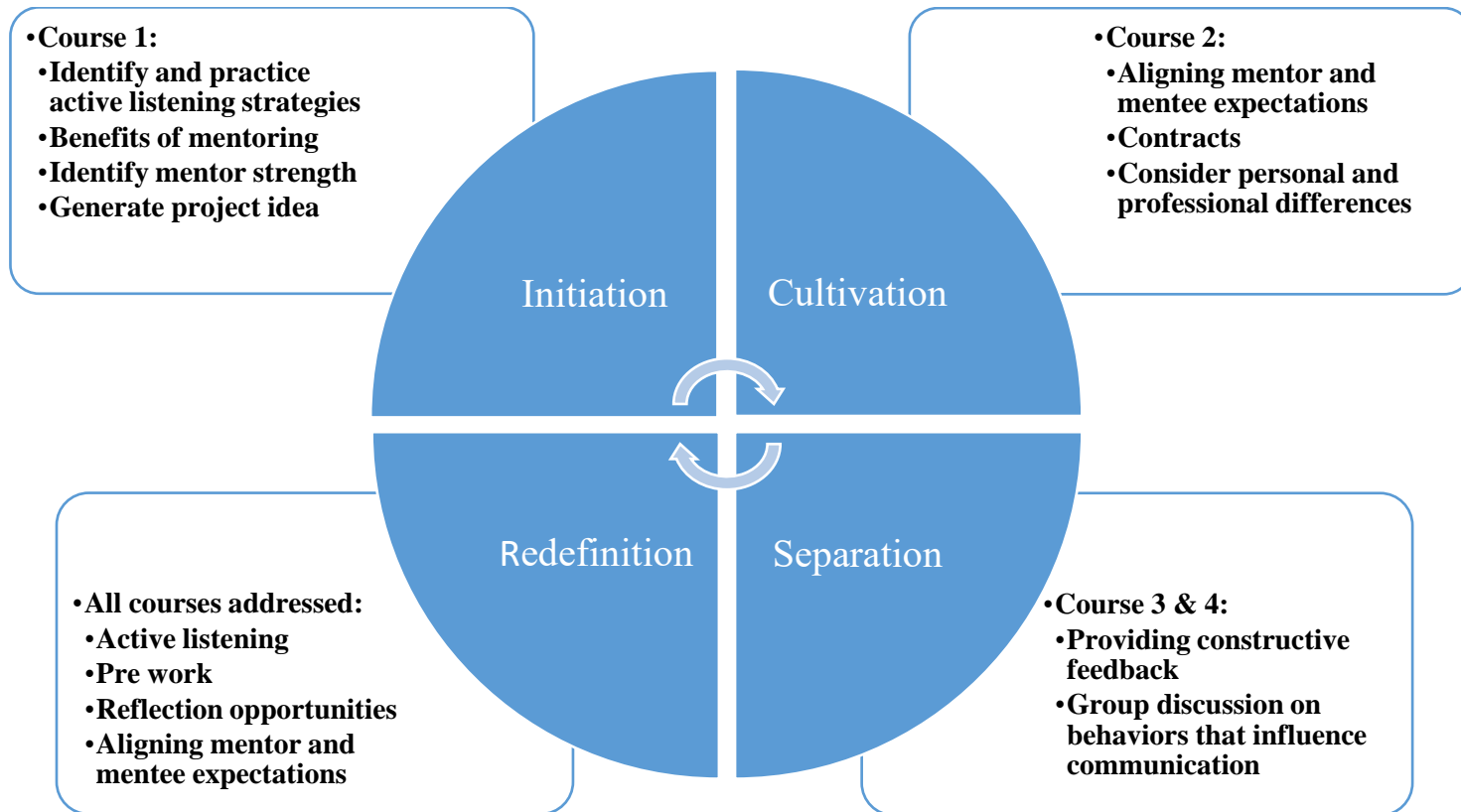
Figure 1*Incorporation of Phases of Mentoring*

Table 1*Integration of Adult Learning Principles*

	Course Session 1	Course Session 2	Course Session 3
Encourage active learning	Brainstorm potential projects in small groups	Use of case studies to explain content on unconscious bias and prejudice	
Create a supportive learning environment	Introductions of participants** Review of online etiquette**		
Provide frequent feedback	Build defined question & answer periods** Use of clarifying statements by facilitators** Ask open ended questions **		Participants shared 2-3 listening strategies learned from reflection of pre work
Respect diverse talents and ways of learning	Allow for typing questions** Use of chat feature** Use of anonymous shared document with group interaction	Small groups to encourage participant experience sharing about bias with personal examples	
Encourage cooperation among learners	Use of focused small group questions and activities with breakout rooms**	Thought provoking questions based on case studies	

**Not all 7 principles were used*

***Principle was used in all three sessions*

Course Session 1: Question & Answer: Mentoring for Capstone & PSA

Description

The first course session provided general information regarding two unique mentor opportunities with NAU's OTD program: PSA and doctoral capstone. Participants learned about the general construct of mentoring, four stages of mentoring (initiation, cultivation, separation, and redefinition), benefits of mentoring students, and potential positive impacts on practice. Additionally, participants were provided an opportunity to openly explore potential projects and activities that apply to their respective work sites during two small group discussions.

Objectives

The course objectives for the session were:

- Distinguish two differences between capstone and Level II fieldwork (*initiation*).
- Examine at least one practice scholar idea that may be appropriate in their setting (*initiation*).
- Identify at least one mentor skill strength and one mentor skill opportunity (*initiation*).
- Reflect on the benefits available to students in their specific practice setting through capstone or PSA (*cultivation*).

Course Session Content

Prerequisites for the course session included an hour of self-study preparatory work review including two peer reviewed articles, a capstone summary document, and one AOTA resource. The first article explained the roles and responsibilities of those involved in capstone projects (Jirikowic et al., 2015), while the second article discussed how mentoring positively affects behavior, attitudes, and work productivity (Doyle et al., 2019). One document for review was the program's capstone project summary of key components and standards of capstone projects as scholarship, while the other was the American Occupational Therapy Association (AOTA) *Vision 2025* statement (AOTA, 2018). Participants were also provided a link to the program's website to explore completed capstone and PSA projects from NAU OTD to stimulate ideas.

During the course, participants learned details about (NAU OTD) PSA and capstone. Definitions of terms, explanation of programs, literature support, and specific examples of each were provided by authors. Participants also gained knowledge on the benefits of being a mentor, mentee, and organization/setting benefits. The course aimed to enhance participants' understanding of mentoring in occupational therapy through a group discussion regarding capstone and PSA projects. This enabled them to distinguish between student roles in fieldwork, PSA, and capstone and how that would distinguish mentoring roles as well amongst the three student experiences. Participants brainstormed about potential projects in small group breakout rooms on Zoom™ and shared how capstone and PSA students could be beneficial in each of their practice settings. Discussion summaries from each breakout room were shared with the larger group.

Course Session 2: Aligning Expectations for Mentorship

Description

The second course session centered on the initiation and cultivation stages of mentoring through aligning expectations for mentoring with focus on OTD capstone and PSA mentorships. In this interactive course session, participants were placed in small groups to discuss content, case studies, and review mentor/mentee contracts.

Objectives

The course objectives for the session were:

- Effectively establish mutually beneficial expectations for mentoring relationship (*cultivation*).
- Clearly communicate expectations for the mentoring relationship (*cultivation*).
- Align mentee and mentor expectations (*cultivation, separation*).
- Consider how personal and professional differences may influence expectations (*cultivation, separation*).

Course Session Content

In preparation for the course session participants completed an hour of self-study and preparatory work. The goal was to have participants better understand mentor/mentee relationships, potential challenges, and the development of expectations and relationships over time. During the self-study and preparatory work, participants engaged in a communication inventory and reflection on their communication patterns (Hackett, n.d.-b) considering interactions with diverse individuals. They also examined an author generated case study to identify potential impacts of conscious and unconscious assumptions, biases, and prejudice. Identifying biases is a crucial step in understanding impacts on the mentor-mentee relationship, as well as determining the best steps towards effective communication (Hoyt et al., 2021). Lastly, participants chose one of two publications provided to review; each article discussed strategies for understanding, recognizing, and addressing issues of equity and inclusion (Bailliard et al., 2020; Hoyt et al., 2021). This is important to the mentor/mentee relationship as it helps individuals engage in conversations about diversity with mentees and provide a sense of interest, open communication, and belonging (Osman & Gottlieb, 2018). Having participants explore the literature provides agency in the learning process (Kolb, 1984; Knowles, 1984).

The synchronous presentation covered various aspects of successful mentoring and key characteristics of an effective mentor. Topics covered included mentorship initiation, cultivation, separation, and redefinition, and exploring several principles of adult learning (Chickering & Gamson, 1987; Zerzan et al., 2009). During the course session participants engaged in aligning their expectations through group discussions centered around a case study. Additionally, a second group activity on mentor contracts was conducted to reinforce the concepts presented.

Course Session 3: Managing Effective Communication and Pulling it All Together

Description

The third course session focused on best practices to manage effective communication in the mentor/mentee relationship including the cultivation, separation, and redefinition stages of mentoring. This course session explored how effective management of constructive and destructive behaviors may affect communication, means of active listening to a mentee, and an overview of several communication styles that can be incorporated throughout the mentoring relationship (Hackett, n.d.-a, n.d.-b; Hackett, 2000; Harris & Hackett, n.d.).

Objectives

The course objectives for the session were:

- Provide constructive feedback through a case study (*cultivation*).
- Discuss constructive and destructive behaviors that can influence communication (*cultivation, separation, redefinition*).
- Identify 2-3 active listening strategies that can be used to strengthen communication (*initiation, cultivation, separation*).
- Identify communication styles and the impact on mentoring (initiation, cultivation, separation, redefinition).

Course Session Content

Participants were asked to complete a communication inventory, reflect on their communication styles with individuals from different backgrounds, review an online article on becoming a mentor (Palmer, 2019), and summarize key points after viewing a TED Talk on the ability to be mentored by Houseworth (2019). During the course session, presenters provided content on the hallmarks of effective active listening, how to identify constructive and destructive behaviors, and methods to provide effective feedback. Course delivery included activities including practicing active listening, completing a communication worksheet, and participating in group discussions to practice key concepts (i.e., providing constructive feedback). This third and final course session synthesized skills reviewed over the three-part training program including mentoring, aligning expectations, and communication, and provided an opportunity for participants to ask questions and receive feedback.

Program Outcomes

The results of a training series aimed at enhancing participants' understanding of mentoring for capstone and PSA projects in occupational therapy are provided in the tables and sections that follow. Authors employed descriptive statistics to present information on practitioner designation, practice experience, practice settings, and the application and perceived value of the program. Out of a total of 40 participants in this mentor training program, 15% attended all three sessions, while 25% attended at least two sessions. Demographic characteristics of the participants in the mentor training series, including practitioner designation and practice experience are provided in Table 2. Table 3 highlights the participants' responses to questions on the application and value of the training series, with a high level of interest expressed in future professional

development opportunities. A free text question in the post course session survey asked participants to provide feedback for the course. Authors received less than 10 free text responses and have provided the nine quotes from sessions in Table 4. Participants were not required to provide feedback and there were no critical or negative comments received.

Table 2*Participant Demographics*

	Course Session 1 Mentoring for Capstone & PSA	Course Session 2 Aligning Expectations	Course Session 3 Managing Effective Communication
Number of Participants	16	13	11
Practitioner Designation	14 (87%) OTR 2 (13%) OTA	13(100%) OTR 0 (0%) OTA	10 (90%) OTR 1(10%) OTA
Practice Experience (years)	Mean = 15 (SD+- =10.16)	Mean = 18 (SD +- =8.67)	Mean = 17 (SD+- =8.7)
Top 3 Practice Settings Represented	1. Adult Acute Care 2. Outpatient Pediatrics 3. School based	1. Adult Acute Care 2. Outpatient Pediatrics 3. School based	1. Adult Acute Care 2. Outpatient Pediatrics 3. School based

Table 3*Application and Value*

	Course Session 1 Mentoring for Capstone & PSA (n=16)	Course Session 2 Aligning Expectations (n=13)	Course Session 3 Managing Effective Communication (n=11)
I can immediately apply information presented in my work or practice	15 (93%)	12 (93%)	10 (93%)
I value having free professional development opportunities	16 (100%)	13 (100%)	11 (100%)
I am interested in attending future professional development opportunities	16 (100%)	12 (93%)	11 (100%)

Table 4
Participant Quotes

Course Session	Quote
1	<i>“Very helpful, good to hear the difference between capstone and PSA.”</i>
1	<i>“This is helpful in helping me decide if I would be interested in being a mentor.”</i>
2	<i>“Super informative and helpful! I appreciate the examples and collaboration among participants.”</i>
2	<i>“This is a valuable topic as I prepare to become a capstone mentor soon. I especially liked the self-reflection.”</i>
2	<i>“This was great! I am new to mentoring and have no structure as demonstrated in this course.”</i>
2	<i>“Appreciate the Effective Communication Styles Inventory.”</i>
3	<i>“May be more beneficial for more real-life scenario work with how to deal with multiple situations related to constructive/destructive feedback.”</i>
3	<i>“Very clear. Thought provoking.”</i>
3	<i>“Really like the communication tool.”</i>

Discussion

The survey responses from participants support the effectiveness of providing the three-part online training program described in this paper, highlighting its straightforward, relevant, and useful content. The virtual format of the series presents an advantage due to its cost-effective nature. There was no financial burden for the participants and the university incurred minimal expenses as the training program relied on existing resources and faculty time. Most participants found the information directly applicable to their work settings and all participants expressed high regard for the value of a free educational series. These key outcomes are useful to consider in building upon the current series and developing ongoing mentor training as a means of support, education, and gratitude.

As OTD programs continue to grow there will be an increase in the number of students who will require quality mentors (Rogers et al., 2022). As occupational therapists seek professional development opportunities, there may also be a need for quality mentor education to support this development (Rogers et al., 2022; Stephenson et al., 2022). While there is solid evidence that mentoring is a beneficial construct across any vocation (Morrison-Beedy et al., 2001; Smith et al., 2021) there is little published work on supporting mentors in the occupational therapy profession (Doyle et al., 2019; Stephenson et al., 2022). The outcomes of this training series support both the

feasibility and the benefits of support, guidance, and education to community partners. Professional development education training with recommendations that can be immediately applied can be beneficial to mentors in terms of building both competence and confidence.

Studies have highlighted the need for mentor training and have found similar training courses to be useful. For example, a qualitative focus group-based study by Helgøy et al. (2022), emphasized the importance of practice educators receiving more education and training to supervise students in using research to inform clinical reasoning. Eriksson et al. (2020) found that successful education programming or workshops included evidence-based content, supportive teams, and interaction with key researchers. While the authors' series shares similarities with these studies, such as evidence-based content and team-based learning, it did not incorporate interaction with key researchers in this mentorship series. Despite this design aspect, the training program was well attended and received positive feedback from participants indicating they could apply the knowledge gained directly into their practice.

Other literature supports intentional design of mentor education and highlights the benefits of creating scholarly communities and implementing strategies learned from educational teachings (Hammel et al., 2002). The current mentorship series allows for interaction among community scholars but has some limitations. It lacks community-building components or workplace-based implementation of strategies. This presents an opportunity for the profession to create a mentoring practice community, especially considering the research-related content in occupational therapy program curricula and OTD program's reliance on community partnerships for student mentoring, reinforcing research concepts, and other experiences.

Partnering with community partners and occupational therapy practitioners in research-related projects is important but can be challenging and time-consuming. However, some models have shown success in bridging the gap between a university's faculty expectations (i.e., teaching, scholarship, and research requirements), and clinical/community practice realities (Kielhofner, 2005; Phillips et al., 2019; Schoen et al., 2021; Suarez-Balcazar et al., 2005). Mentoring training provided by university programs to community partners could be an initial step in bridging expectations from the university and the realities of boots on the ground clinical and community practice.

While the three-part training program series was found to be beneficial, it has not been evaluated in a formal research study. Results from post-course session surveys should be interpreted cautiously due to limitations including: convenience sample, potential participant bias to provide positive feedback for a free training program, small participant size, and limited variability in participants. Future mentor training programs could consider incorporating community-building components and promoting real-world implementation of strategies, in addition to the provided case studies. Future research should explore the development of an occupational therapy specific mentor self-assessment tool that would support both mentor development and evaluate the outcomes of future mentorship education.

Implications for Occupational Therapy Education

Participants in the mentoring series expressed gaining valuable knowledge they could immediately implement. There are four key takeaways from this project that can be applied and implemented by educators. First, this mentor education program can be designed in a way to be easily replicated with consistency and delivered numerous times. This ensures that mentor education initiatives can reach a broad and or remote audience. Second, there is an opportunity for occupational therapists who participate in mentor education to contribute to future content and topics. This engagement not only ensures that the education remains relevant but empowers occupational therapists to contribute to content creation and presentation, fostering skill development. Third, mentor education has the potential to promote peer-to-peer mentorship and through this experiences and resources can be shared. Finally, providing accessible and free educational series, like the one discussed in this paper, builds mentor competence and capacity to assume mentor roles.

Conclusion

As OTD programs continue to expand, the demand for quality mentors is expected to rise, as highlighted by Rogers et al. (2022). This program's success emphasizes the need for ongoing mentor education and support. It also encourages the development of a mentoring practice community within the profession, bridging the gap between university expectations and clinical/community practice realities. Mentor education in occupational therapy has the potential to benefit the profession by ensuring the readiness and competence of mentors who guide the next generation of practitioners and researchers.

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