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Educational Occupational Therapy Interventions for Post-Discharge Clients: A Case Report to Determine the Need for a Student-Led Occupational Therapy Center

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Western New England University

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Educational Occupational Therapy Interventions for Post-Discharge Clients: A Case Report to
Determine the Need for a Student-Led Occupational Therapy Center

A Doctoral Experiential Capstone Project

Presented to the Faculty of Western New England University

In Partial Fulfillment of the Requirements for the

Entry-Level Doctorate

in

Occupational Therapy

by

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July 2022

Educational Occupational Therapy Interventions for Post-Discharge Clients: A Case Report to

Determine the Need for a Student-Led Occupational Therapy Center

A Doctoral Experiential Capstone Project

By

Jatara Rozario, OT/s

July 2022

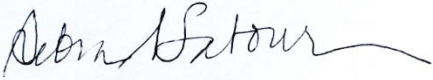
APPROVED BY:



Brittany Adams, OT, OTD, MS, OTR
Faculty Mentor

July 25, 2022
Date

APPROVED BY:



Debra Latour, OTD, M.Ed., OTR/L Doctoral Experiential Coordinator

July 27, 2022

Date

Abstract

This doctoral experiential capstone aimed to enhance community access to occupational therapy services and provide evidence that a student led-center can effectively promote continued care for clients in need. The Springfield and Hampden County communities lack access to health care services due to a large number of residents requiring government assisted programs to fund healthcare needs. This can pose challenges for individuals who sustain complex injuries or are diagnosed with conditions that require extensive rehabilitative services years post-onset. Funding skilled therapy services for these clients may come with limitations due to insurance company policies such as caps on therapy visits per year and lack of affordable services. Clients are discharged for these reasons and may leave therapy with unmet needs. It was found that The Bringing Equity, Accessibility and Rehabilitation to People Achieving Wellness (BEAR PAW) Center can help to alleviate community members' barriers to care by providing student-led occupational therapy (OT) interventions at no cost to clients. The BEAR PAW Center creates a unique opportunity for student occupational therapists and center volunteers to increase access to OT services and create competent and confident future practitioners.

Keywords: Post-discharge, insurance, educational interventions, student-led treatment, community-based setting

Introduction

Background

Prematurely discharged or post-discharge clients, which will be used interchangeably in this text, refers to individuals who have reached their maximum amount of insurance benefits, have plateaued across the care continuum (i.e., acute, in-patient rehabilitation, outpatient, etc.), were denied extended service, lack of community resources, and who feel they would benefit from continued therapy. Premature discharge can affect any client across the care continuum, especially individuals receiving therapy services (occupational therapy (OT), physical therapy (PT), and/or speech language pathology (SLP)). However, the influence of insurance restrictions and therapy caps typically involves clients with more complex injuries (i.e., cerebral vascular accident (CVA), traumatic brain injury (TBI), spinal cord injury (SCI), etc.) that may require all three skilled services over the duration of recovery. For these clients, recovery time can be lifelong which places individuals at a disadvantage once they are years past the acute phase of injury, have medically plateaued per therapist documentation, and/or have exhausted all insurance benefits. Insurance companies and healthcare organizations have strict policies regarding allotted therapy visits. For example, Blue Cross Blue Shield health insurance organization allows only 26 visits for outpatient rehabilitative services in total, which allows members 12 occupational therapy benefit days yearly (BCBS, 2019). Unfortunately, these visits may be exhausted quickly, leaving clients with unmet needs and feeling they are ill-equipped to discharge home or to the community (Smith-Gabi, 2016). Many of these clients attempt to seek extended services, however, do not know where to access therapy services or are unable to pay out-of-pocket as rehabilitation services do not have a standard payment system per visit.

Population

Data collected from the Springfield Health Equity Report (2014) and Baystate's Community Needs Assessment (2019) identified limited access to healthcare services and inadequate insurance coverage as negative influences on health and well-being, placing evident barriers on the surrounding community. These community reports identified 100,773 residents as compared to Springfield's population of 155,472, are users of MassHealth benefits (government-based health plans) designating these individuals as one of the highest consumers of MassHealth benefits in the state of Massachusetts. This data illustrates that Springfield residents have a higher risk for underinsured medical coverage and reimbursement caps for rehabilitation services. Although there are programs to help combat inequities in healthcare experienced by underinsured and uninsured individuals in Hampden County, there is a lack of organizations directly related to occupational therapy services. Currently, there are two community-based clinics that provide occupational therapy services at no cost to consumers. These include the Live Well Clinic at Springfield College and Springfield Technical Community College Certified Occupational Therapy Assistant Program. However, these clinics alone are not equipped to service the increasing need for rehabilitative services within the Springfield community.

Overview of Doctoral Experiential Project

The focus of this Doctoral Experiential (DEx) project was threefold (1) to pilot a 6-week scholarly project that supported the continuation of therapy for discharged clients, (2) to support the development of a student-led occupational therapy center as a resource for community members to gain access to OT services, and (3) design functional space for students to merge their clinical and

didactic course work to enhance their real-world application of OT in a non-traditional community setting.

Doctoral Experiential Site

The establishment of the BEAR PAW Center at Western New England University (WNE) began with a Doctoral Experiential (DEx) capstone group of the 2021 cohort of Doctor of Occupational Therapy Students. These doctoral candidates set the tone of the BEAR PAW center by designing the center to be run under a student-led pro-bono model and created the BEAR PAW Center's Manual and Sustainability Plan. The students also developed the centers financial relations by applying for grants and additional university funding to support renovations of the original location to prepare it for center operations and to host clients. The original location was an off-campus house, and the goal was to provide clients with a similar home and/or community environment to promote familiarity and carryover of skills learned at the BEAR PAW center. Unfortunately, the house was not ADA (Americans with Disabilities Act) accessible and was not renovated in time to host clients. Luckily, the WNE Occupational Therapy department already has a functioning ADA accessible space on campus known as the functional learning labs where four DEx students' scholarly and experiential components could be completed in a safe manner over a 14-week period. The future of the BEAR PAW Center will focus on having a space for both therapeutic activities and real-world application of skills all under one roof. The hope is that one day the BEAR PAW Center will be an interprofessional space for merging occupational therapy, pharmacy, and biomedical engineering, among other professions.

Scholarly Component

To provide evidence for the effectiveness of the BEAR PAW Center and student-led interventions, students piloted four studies to address various populations within Hampden County including: (1) chronic disease management, (2) neurotrauma and self-concept, (3) obstructive sleep apnea, and (4) post-discharge clients. This report will provide an abstract and submission conformation of the study titled *Student-Led Occupational Therapy Interventions for Post-Discharge Clients: A Case Report*. Please see Appendix A for proof of submission to the OTJR: Occupation, Participation, and Health for publication.

Experiential Component

The experiential component consisted of four doctoral candidates and faculty/site mentor's efforts to solidify the BEAR PAW Center as a student-led community resource and functional learning space for WNE OTD students over a 14-week period. To begin the sustainability of the center students used several recruitment methods to market the BEAR PAW Center to community members and organizations. These included University Posts, program flyers, BEAR PAW Center brochure, emails to rehab professionals in the area, in-person presentations, health career fairs, community outreach, and word of mouth (Appendix B). Marketing initiatives fostered community connections allowing students to interact with 10 program participants during their pilot projects. Continued marketing of the BEAR PAW Center has been supported by community service databases such as Eldercare and Highland Valley Senior Services. Students are currently working with the Executive Office of Aging to increase the reach of the BEAR PAW Center to other communities in Massachusetts (Appendix B).

In addition, students assisted legal operations of the clinic by assisting the site/faculty mentor in understanding Department of Public Health (DPH) healthcare clinic licensure and

whether it was required to treat clients at the BEAR PAW Center. This led to conversations with community therapy clinic organizers such as Dawn VanDeMark, the coordinator of Massachusetts College of Pharmacy & Health Sciences physical therapy Balance Movement and Wellness Center (Appendix C) who also gave students a guide on how to integrate the BEAR PAW Center into the OTD curriculum. To do this, students first focused on revising and updating the current BEAR PAW Center Manual (Appendix D) and Sustainability Plan (Appendix D). Through these actions, students determined the gaps within these documents that may have affected the integration of the BEAR PAW Center successfully including student competencies and objectives for participation in the center (Appendix E), BEAR PAW Center documentation, culturally sensitive medical intake forms (Appendix E), and courses that supported the BEAR PAW Center initiatives (Appendix E).

The plan developed by this doctoral group is to launch the BEAR PAW Center in Fall 2022 with year one and year two OTD students completing 10 course hours dedicated to the BEAR PAW Center through OTD 512 and OTD 638 (courses that focus on evaluation, treatment planning, and clinical application of OT practice). During their time at the center, each group has their own set of learning objectives. OTD year one's must complete 10 competencies (i.e., observe an evaluation session, administer assessments, and complete client education on adaptive equipment), while year twos must complete 15 competencies (I.e., administer a modality, create a home exercise program, and complete discharge planning). Prior to the start of treating clients in the BEAR PAW Center students must complete the cultural competency and diversity, equity, and inclusion training in order to gain knowledge of the Springfield community and how to perform ethical unbiased treatment along with learning to apply cultural humility to evaluation documents and everyday practices. These steps assisted in creating the foundation to implement the BEAR

PAW Center in the OTD curriculum starting this upcoming Fall semester for OTD class of 2024 and 2025.

Discussion/ Recommendations

In completing this DEx project, the student researcher found the creation of the BEAR PAW Center focused on closing a gap in care in the Hampden County community. Literature revealed the need for establishing external resources for accessing occupational therapy services and building knowledge of the application of OT for both students and clients. The students' scholarly studies showed that student-led interventions can be beneficial to clients. Student practitioners must study current best practices, evidence-based interventions, and all treatment operations/planning are under the review of licensed occupational therapists, all leading to highly effective provision of OT services. The BEAR PAW center fosters 1:1 client-centered treatment and encourages students to build a rapport with community members in a way that traditional for-profit therapy organizations may not. For example, when the binds of reimbursement and productivity standards are illuminated students are able to provide thorough evaluations and gain a deeper understanding of clients concerns regarding how their injury/condition influences daily roles and routines, occupational performance, and quality of life. The BEAR PAW Center is intended to assist skilled practitioners as well, acting as a referral resource for clients who are no longer able to pay for therapy but would still benefit from continued care, and/or practitioners who are willing to volunteer their time to enhance student learners understanding of the role of occupational therapy in a community setting. Outside of being a community resource, the BEAR PAW Center facilitates the professional development of student therapists. The opportunity to develop real-world application of culturally competent, client-centered, evidenced-based occupational therapy prior to Level II fieldwork creates well-rounded, and experienced therapists

who understand the importance of cost-effective treatment methods and have hands-on practice serving a variety of populations.

Learning Objectives/ Outcomes

The DEx Capstone provided a unique opportunity for the student researcher. Further details of these objectives can be found in Appendix F. The researcher learned to develop cost-effective interventions for clients treated at the BEAR PAW Center. This included creating simulated activities with materials available in the functional learning labs (i.e., cardboard box, weighted therapy bar, and balls for simulated golf) as well as adapting prefabricated splints in order to reduce wasted materials. The DEx also assisted in the development of communication skills. The student learner presented information about the BEAR PAW Center to OTD students, WNE faculty and staff, and at community events. The student also practiced patient and caregiver education. This allowed for the researcher to assist with health literacy by explaining therapeutic concepts/interventions in ways that clients can understand and apply through the “teach back” method. The student researcher was also able to enhance written communication skills through treatment documentation, BEAR PAW Center documents and scholarly assignments. These allowed for reflection on the student's strengths and areas of improvement for future practice. In addition, the capstone project helped the researcher understand the importance of client-centered care and how focusing on what clients want and need to do is essential to becoming an impactful practitioner.

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OTJR: Occupation, Participation and Health

Student-Led Occupational Therapy Interventions for Post-Discharge Clients: A Case Report

Journal:	<i>OTJR: Occupation, Participation and Health</i>
Manuscript ID	Draft
Manuscript Type:	Original Article
Keywords:	Case study, Client-centered practice, Community- based rehabilitation, Occupational Performance, Functional outcomes
Abstract:	<p>Background: Insurance restrictions place an increased burden on clients as many individuals are discharged with unmet needs that affect participation in desired activities years post injury.</p> <p>Objectives: A six-week student-led educational occupational therapy program was used to determine if clients had the potential to increase functional outcomes post-discharge and support the need for an on-campus student-led occupational therapy center.</p> <p>Methodology: The researchers chose a case series using a mixed method experimental intervention approach in a community-based setting to treat two program participants.</p> <p>Results: Participants' quantitative measurements demonstrated improvement in functional outcomes including functional mobility and disability of the upper extremity. The qualitative findings demonstrated differential outcomes related to goal achievement for both participants.</p> <p>Conclusion: Clients can make significant progress post-discharge. However, self-perception of disability and access to services can influence occupational performance. A student-led occupational therapy center can help clients achieve therapy goals once all insurance benefits have been exhausted.</p>

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Submission Confirmation

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Thank you for your submission

Submitted to

OTJR: Occupation, Participation and Health

Manuscript ID

OTJR-22-0111

Title

Student-Led Occupational Therapy Interventions for Post-Discharge Clients: A Case Report

Authors

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Date Submitted

27-Jul-2022

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NEED MORE THERAPY?

TRY OUR 6-WEEK OCCUPATIONAL THERAPY PROGRAM AT NO COST TO YOU



1

Who Qualifies: Participants must be 21 years or older and recently discharged from a rehabilitation facility

2

Benefits:

- Educational OT services at no cost
- Participating in individualized interventions to increase independence and quality of life in meaningful activities
- Access to additional educational resources regarding diagnosis

3

Location:

Therapy Sessions will be held at Western New England University in Springfield, MA. All educational OT services will be provided by a 3rd year OT student and supervised by a licensed occupational therapist

**FOR INQUIRIES AND TO CONFIRM
ELIGIBILITY, EMAIL US AT
JATARA.ROZARIO@WNE.EDU**



This study has been approved by the WNE Institutional Review Board under the supervision of Primary Investigator Dr. Brittany Adams at brittany.adams@wne.edu



Need Services?

CONTACT US

Website

www.WNE.edu/BEARPAWCenter

Email Address

brittany.adams@wne.edu

Address

1215 Wilbraham RD, Springfield, MA 01119
Location: 2nd floor of the Blake Law
Building, Occupational Therapy Labs 230
A/D



WE HAVE
DEVELOPED OUR
CENTER AND ARE
READY FOR
CLIENTS.



WNE OTD

BEAR
PAW
CENTER

WHO WE ARE

What/who are Occupational Therapist (OT)?

OTs want to be sure that people are able to engage in occupations that are meaningful and important by helping individuals regain the skills needed to perform everyday tasks.

What are occupations?

Anything you do such as: eating, dressing yourself, getting in/out the shower, making friends, grocery shopping, managing medication, using public transportation, taking care of your pets, the list goes on. Reasons people seek OT can be complex after a physical or cognitive impairment or as simple as seeking preventive measures or adapting new methods in order to complete daily activities successfully. We partner with our clients to create a set of achievable goals for them to be able to function independently in their daily lives and environment.

WHAT WE SEEK TO ACCOMPLISH

Mission Statement

The WNE BEAR PAW Center aims to reduce health disparities and promote health equity to the surrounding community by providing pro bono, high-quality, client-centered OT services to uninsured and underinsured community members across the lifespan. The center aspires to collaborate with clients to increase their participation in meaningful activities and promote independence in their daily lives.

Vision Statement

The vision of the BEAR PAW Center is to become an innovative resource to assist in decreasing health inequities and disparities within our community through the development of an interprofessional center. Our goal is to simultaneously create a service-learning environment for students to provide high-quality services in collaboration with other disciplines within the center. Expanding into a pro bono, interprofessional center will generate new opportunities for comprehensive care that addresses a wide array of needs throughout our community.

OUR SERVICES

We provide access to Occupational Therapy services lead by Western New England University OTD students and supervised by licensed therapist .

- Initial Evaluations
- We focus on Client-centered goal development and engagement
- 1:1 Treatment
- Evidence-based interventions and much more!

Steps to Enhance Access to the BEAR PAW Center

DEx students are currently waiting instructions from the free medical services database these organizations include:

- Eldercare database for senior resources
- Department of aging (greater springfield senior services (413-781-8800)
- Highland Valley Elder Services (413-586-2000)
- Executive Office of Elder Affairs (800-243-4636)

SERVICE PROVIDER PROFILE

Date: 7/11/2022

Name: Jatara Rozario and Dr. Brittany Adams

Address: 1215 Wilbram Rd, Springfield, MA, 01119

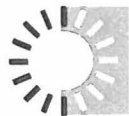
Town/State/Zip: brittany.adams@ wne.edu or jatara.rozario@ wne.edu

Telephone: please use email at this time E-Mail: _____

What specific services do you offer?

- | | | |
|---|--|---|
| <input type="checkbox"/> Companion | <input type="checkbox"/> Homemaker | <input type="checkbox"/> Overnights |
| <input type="checkbox"/> Grocery shopping | <input type="checkbox"/> Live in | <input type="checkbox"/> Personal Care |
| <input type="checkbox"/> Hairdressing | <input type="checkbox"/> Meal Preparation | <input type="checkbox"/> Snow removal/shoveling |
| <input type="checkbox"/> Handy work | <input type="checkbox"/> Nursing | <input type="checkbox"/> Transportation |
| | <input checked="" type="checkbox"/> Other (give details below) | <input type="checkbox"/> Yard work |

see at bottom of page



Highland Valley
ELDER SERVICES

Specific qualifications:

- ☐ RN ☐ PCA ☐ LPN ☐ CNA ☐ CHHA ☐ LSW ☐ LICSW

Are you certified/licensed: ☒ Yes ☐ No

Type of license: Occupational Therapy

Expiration date: n/a

Other training/background: _____

Are you bilingual? n/a If so, in what language(s)? _____

When are you available: ☒ Days ☐ Nights
☐ Overnights ☐ Weekends

Please state days and times: By appointment

We provide student-led occupational therapy services at no cost under the supervision of a licensed OT at Western New England University.



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T: 413.586.2000 F: 413.584.7076
320 Riverside Drive, Suite B, Florence, MA 01062 qll@highlandvalley.org www.highlandvalley.org

Geographic area covered (towns where you will work):

- | | | | |
|-------------------------------------|--------------------------------------|---------------------------------------|---------------------------------------|
| <input type="checkbox"/> Amherst | <input type="checkbox"/> Blandford | <input type="checkbox"/> Chester | <input type="checkbox"/> Chesterfield |
| <input type="checkbox"/> Cummington | <input type="checkbox"/> Easthampton | <input type="checkbox"/> Goshen | <input type="checkbox"/> Granville |
| <input type="checkbox"/> Hadley | <input type="checkbox"/> Hatfield | <input type="checkbox"/> Huntington | <input type="checkbox"/> Middlefield |
| <input type="checkbox"/> Montgomery | <input type="checkbox"/> Northampton | <input type="checkbox"/> Pelham | <input type="checkbox"/> Plainfield |
| <input type="checkbox"/> Russell | <input type="checkbox"/> Southampton | <input type="checkbox"/> Southwick | <input type="checkbox"/> Tolland |
| <input type="checkbox"/> Westfield | <input type="checkbox"/> Westhampton | <input type="checkbox"/> Williamsburg | <input type="checkbox"/> Worthington |
| | | | <input type="checkbox"/> Other _____ |

Fees charged: Per hour: no cost services

All residents are welcome

Per overnight: _____

Sliding fee ☐ Yes ☐ No

Volunteer ☐ Yes ☐ No

Are you interested in Take Charge? ☐ Yes ☐ No (See attached)

*All of your information listed above will be available to consumers on the internet at www.highlandvalley.org.

References: (Optional: Reference checks will not be conducted by Highland Valley. This information is for the use of individuals seeking assistance.)

1. Name: n/a
Address: _____
Telephone: _____

2. Name: _____
Address: _____
Telephone: _____

Additional comments and notes: _____

Please note that this listing is valid for 11 months and will be updated on a yearly basis. When it is time to update your listing, you will receive notification by either e-mail or letter and will have 30 days to complete this. If you do not, then the listing will be dropped from the database.

Signature Jatara Rozario

Date 7/19/2022

Meeting minutes with Dawn from MCPHS

Clinic Name: Balance Movement and Wellness Center for Worcester

Normal clinic operations consist of:

- The clinic accepts 12 participants a semester (fall & spring) for 8-10 weeks, participants are treated at the clinic for an 1 hr and 15 minutes twice a week.
- Mentorship- First and second-year students are paired for the semester. Second year students are placed in groups of 3 in- order to build rapport with clinic participants during evaluations.
- Participants are randomly assigned to a student pair.
- Evaluations are completed by second year students at the beginning of the semester
- Each session is separated into 3 components each session (i.e., balance, therapy) and treatment planning is completed by students prior to client sessions. These treatment plans are reviewed by supervising faculty.
- Students are required to complete SOAP notes, pick standard outcome measures, and end of episode care. Students use professional PT EMR systems for documentation. These are reviewed by supervising faculty for feedback/ grading.
- The BMWC is integrated into course work. Students are required to attend the clinic two weeks out of the semester. Data collected from the clinic is also used by other university faculty for learning activities inside the classroom.
- Students complete one interprofessional activity and poster presentation with pharmacy student

Participants:

- Clients required to complete waiver form, consent form, HIPPA release form, and attendance policy.
- BMWC sends letter to PCP to notify of clients participation in the program, here clinic gathers necessary info (i.e., precautions)
- Client receives certificate of completion at the end of program and completes student performance evaluation.

Recruitment:

- BMWC does not offer "skilled PT" as they do not want to compete with other for profit clinics in the area. BMWC is strictly for individuals who have impairments, have had PT in the past, chronic impairments that insurance no longer wants to cover and would benefit from additional help.
- Wellness fair in the community (i.e., senior center, SNF, assisted living)
- Brochures
- University Webpage, program specific webpage
- Word of mouth, sharing program brochure with other healthcare clinics run within the university.

DPH Licensure:

- Did not require DPH licensure during clinic start up. Participants only signed waiver forms.

- 2-3 years ago got licensure as other university health clinics (vision dental, and acupuncture) began providing billable services. The university's hope is that the clinic will generate revenue but PT.
- DPH made manuals and protocols for clinic operations

**WESTERN NEW ENGLAND UNIVERSITY
DIVISION OF OCCUPATIONAL THERAPY
BEAR PAW CENTER**

EDUCATIONAL VOLUNTEER CONSENT AND RELEASE

As an educational volunteer, I understand that I will help in the instruction by: 1) providing students with learning experiences; 2) enabling students to practice interviewing, physical examination, and occupational therapy skills; 3) providing an objective, unbiased evaluation of students.

As an educational volunteer, I understand that I am expected to cooperate in a professional manner which will require flexibility and commitment to meet the program's needs. I understand that I will be interviewed by, examined by, and/or receive occupational therapy services from students in the Division of Occupational Therapy in the same manner that would occur if I were an actual client and hereby voluntarily and on an informed basis consent to such interviews, examinations, and occupational therapy services. I understand that I have the right to ask questions about the services that will be provided to me and to have those questions answered to my satisfaction before proceeding. My role as an educational volunteer may include, but is not limited to, physical examination procedures that are normally part of a provider-client encounter and occupational therapy and medical history interviews.

I understand that participating in physical examinations and occupational therapy services carries inherent and other risks, including but not limited to physical injuries. I understand and acknowledge that these risks may result from or be compounded by the acts, omissions or negligence of others, including the University's employees and students. I understand that I have the right to ask questions about those risks and to have those questions answered to my satisfaction before proceeding. I hereby represent that I have obtained any information I may need to determine the risks associated with serving as an educational volunteer and to make an informed assumption of those risks. UNDERSTANDING THE FOREGOING, I HEREBY ACCEPT AND ASSUME ALL RISKS OF MY PARTICIPATION AS AN EDUCATIONAL VOLUNTEER, WHETHER CAUSED BY THE NEGLIGENCE OF THE UNIVERSITY OR OTHERWISE.

I hereby expressly release, absolve and agree not to sue the University or its officers, directors, employees and agents (collectively, "Releasees") with respect to any claim, liability or cause of action, whether now existing or hereafter arising, related to my participation as an educational volunteer, whether due to the negligence of the University or any Releasee or otherwise.

I understand that in all standardized client roles a licensed occupational therapist faculty member will be present. I understand that I may withdraw as an educational volunteer at any time. I understand that client sessions are for instructional, practice, and evaluation purposes only. They do not constitute personal medical care. I understand I will be examined by someone who is not an experienced or licensed medical practitioner and I have no expectations that this person will be able to render an opinion about my personal medical care. I understand that I am responsible for my own medical care and will present my questions and conditions to my own health care provider. I understand that Bear Paw Center is not a licensed clinic. I

understand that I should consult my legal counsel before being examined or receiving occupational therapy services for any workplace or other injury that is or may be the subject of a legal dispute or proceeding.

I agree to videotaping or audiotaping of general physical examinations, medical history sessions, and occupational therapy for teaching purposes including review of tapes by faculty, students, and other standardized clients.

I agree to keep confidential information that I receive as an educational volunteer, including any performance checklists and evaluation forms. I also agree to keep confidential my observations and evaluation of a student's performance when I am in the role of an educational volunteer.

I hereby acknowledge that I have read this consent and release form carefully. I acknowledge that I have had the opportunity to ask any questions concerning the nature and purpose of my role as an educational volunteer and the potential benefits and possible risks associated with my role.

This consent and release does not expire. I understand that I may revoke this consent and release by contacting Dr. Brittany Adams in the WNE Division of Occupational Therapy. However, revocation shall not be effective with respect to, and this consent and release shall continue to apply to, activities, examinations, treatments, services, acts, omissions and disclosures that have already occurred as of the date of revocation.

Mark which examinations in which you are consenting to participate:

_____Medical history interviews

_____General Physical Examination

_____Occupational Therapy Session

Individual's Name (Print)

Signature

Date

Date of Birth: _____

Email address: _____

Phone number: _____(best number to reach you)

**WESTERN NEW ENGLAND UNIVERSITY
DIVISION OF OCCUPATIONAL THERAPY
BEAR PAW CENTER**

EDUCATIONAL VOLUNTEER CONDUCT EXPECTATIONS

As an educational volunteer, I agree to the following:

- 1. I am at least eighteen (18) years of age or I am the legal parent/guardian of the educational volunteer**
- 2. When asked to evaluate students, I will do so fairly, without regard for the student's age, gender, or ethnic/cultural background.**
- 3. I will not use my participation as an educational volunteer for personal gain or favor other than the satisfaction of contributing to medical education. This includes but is not limited to initiating or fostering a close or intimate personal relationship with any student.**
- 4. I will not discuss the details of any examination or interview, including evaluation tools and my assessment of any student, with anyone other than the faculty member of the course in which a student is being evaluated.**
- 5. I will report any inappropriate behavior by a student that I observe to Dr. Brittany Adams in the WNE Division of Occupational Therapy.**

I have read, understand, and agree to abide by these Conduct Expectations

Signature of Educational Volunteer

Date



Western New England University
Division of Occupational Therapy

Bringing Equity, Accessibility, and Rehabilitation to People Achieving Wellness (BEAR PAW) Center **Manual**

Created 2021

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General Center Information, Policies, & Protocols

Introduction

Welcome to Western New England University's (WNEU) Bringing Equity, Accessibility, and Rehabilitation to People Achieving Wellness (BEAR PAW) Center manual. This manual serves as a guide for daily center operations of the Center. This document will outline center policies and procedures related to all occurring events. Furthermore, this manual will act as a reference for new occupational therapy student practitioners on the center responsibilities and expectations. Faculty and licensed occupational therapy (OT) staff will use this manual as an informative guide while supervising students, as well as to orient themselves to the necessary policies and procedures of the center.

Purpose

The BEAR PAW Center provides numerous benefits to WNE, the Division of Occupational Therapy, and the surrounding community. Through providing an innovative space, the BEAR PAW Center provides new opportunities for fieldwork, hands-on application of didactic coursework, and doctoral experiential (DEx) projects, which fulfill accreditation requirements. Additionally, this space allows multiple opportunities for faculty, student, and interprofessional research projects. The BEAR PAW Center will be a beneficial tool to connect with faculty, current students, alumni, and incoming students. The BEAR PAW Center will be one of a kind in the area and will support the OT program through the recruitment of new students, while also offering opportunities for continued collaboration with WNE Doctor of Occupational Therapy (OTD) alumni students. Furthermore, the BEAR PAW Center will provide necessary OT services to underserved and underinsured community members, across the lifespan. WNE's dedication to serving our community will be demonstrated through the work done at the BEAR PAW Center. Lastly, the BEAR PAW Center aspires to expand into an interprofessional center through developing mutually beneficial relationships with other WNE programs, local colleges, and universities.

Mission Statement

The WNE BEAR PAW Center aims to reduce health disparities and promote health equity to the surrounding community by providing pro bono, high-quality, client-centered OT services to uninsured and underinsured community members across the lifespan. The center aspires to collaborate with clients to increase their participation in meaningful activities and promote independence in their daily lives.

Additionally, the BEAR PAW Center will serve as a unique educational opportunity for OTD students at WNE while raising awareness of the OT profession among our community. We strive to educate and empower OT students through new opportunities to implement knowledge from didactic coursework while working with real clients under the supervision of licensed OTs. This will mutually benefit all stakeholders.

Vision Statement

The vision of the BEAR PAW Center is to become an innovative resource to assist in decreasing health inequities and disparities within our community through the development of an interprofessional center. Our goal is to simultaneously create a service-learning environment for students to provide high-quality services in collaboration with other disciplines within the center. Expanding into a pro bono, interprofessional center will generate new opportunities for comprehensive care that addresses a wide array of needs throughout our community.

Health Insurance Portability and Accountability Act

The Health Insurance Portability and Accountability Act (HIPAA) is a federal law requiring national standards to be in place to protect patient health information from being disclosed without the patient's consent or knowledge. For more information on HIPAA please, visit the [Department of Health and Human Services](#) website (see Appendix A for full link). [Basic information](#) (see Appendix A for full link) regarding HIPAA will also be kept within the center as a guide for students, faculty, and licensed supervisors.

Students will be required to complete HIPAA training and compliance forms before participating in any center operations.

Family Educational Rights and Privacy Act

The Family Educational Rights and Privacy Act (FERPA) is a federal law protecting the privacy of student education records. For more information on FERPA, please visit the [U.S. Department of Education](#) website (see Appendix A for full link). Basic information from The U.S. Department of Education will be available in the center for students, faculty, and licensed supervisors to use as a guide.

American Occupational Therapy Association (AOTA) Code of Ethics & Ethically Appropriate Care

OT practitioners and students involved with the BEAR PAW Center are responsible for abiding by the AOTA's Code of Ethics, as detailed below, to provide care that reflects the seven Core Values, six Principles, and seven Standards of Conduct for the profession. When working with clients, caregivers, healthcare professionals, policymakers, payers/funders, administrators, and colleagues, it is expected that practitioners will regularly demonstrate and promote ethical conduct.

The AOTA's Code of Ethics guides OT students and therapists to prioritize the clients' best interests and to protect the public's perception of the OT field. These ethics aim to ensure that all students and therapists protect the integrity of the OT profession. According to AOTA (2020b):

“The Code of Ethics is an AOTA Official Document and a public statement tailored to address the most prevalent ethical concerns of the occupational therapy profession. It sets forth Core Values and outlines Standards of Conduct the public can expect from those in the profession. The Code applies to all occupational therapy personnel in all areas of occupational therapy and should be shared with relevant stakeholders to promote ethical conduct.”

The Code serves two purposes:

1. It provides aspirational Core Values that guide occupational therapy personnel toward ethical courses of action in professional and volunteer roles.
2. It delineates ethical Principles and enforceable Standards of Conduct that apply to AOTA members (p.1).”

Please refer to [AOTA's Code of Ethics](#) (see Appendix A for full link) for further information.

Evidence-Based Practice

Students participating in the BEAR PAW Center will use evidence-based practice (EBP) when working with clients. EBP is when the OT's clinical expertise, client-centered care, and critically appraised research results , are integrated into treatment. Utilization of EBP assists students in providing the most effective care while simultaneously improving client outcomes. EBP keeps students, faculty, and licensed OT practitioners working in the center up-to-date on current best practices while improving client participation. OT students can explain the reasoning and evidence behind each intervention while providing services.

For additional resources please visit [AOTA's Evidence-Based Practice & Research](#) page (see Appendix A for full link).

Occupation-Based & Client-Centered Care

Occupation-based and client-centered care reflects the foundational values of the OT profession. Occupations are everyday activities that bring meaning and purpose to life while reflecting one's interests and skills. OT practitioners engage clients in interventions that are tailored to occupations that are relevant and meaningful to the client in order to enhance participation and satisfaction in daily activities. Client-centered care allows clients to be active participants in the therapy process. Client-centeredness emphasizes respect for the client and their overall autonomy.

In order to integrate occupation-based and client-centered care into treatment at the BEAR PAW Center, students will begin the evaluation process by using the occupational profile to learn more about the client's routines, roles, interests, and values, as well as the barriers they are facing. Students will then observe the client's occupational performance in order to begin treatment planning. Students will also ensure clients have an active role in the development of their treatment plans.

Culturally Sensitive & Competent Care

Cultural sensitivity refers to an individual's willingness and ability to take the time to learn and understand different cultural backgrounds than their own. While cultural competence is the ability to recognize differences and appropriately respond to individuals with varying cultural backgrounds, ages, races, religions, sexual orientations, abilities, and ethnicities allowing for individuals to feel respected and valued. Cultural differences may unintentionally influence interactions and create barriers to providing services to diverse populations. In order for student practitioners to provide culturally sensitive and competent care, they must educate themselves and provide services that are relevant to each client's cultural values and needs. Additionally, it is crucial for individuals to acknowledge and reflect on personal biases they may hold, as those biases can unconsciously lead to harmful effects impacting the care provided to clients.

In order to ensure the students of the BEAR PAW Center are providing culturally sensitive and competent care, there are a variety of [educational resources](#) that are mandatory for students to review prior to serving in the center. Additionally, students are required to attend a minimum of two events per year organized by the Coalition of Occupational Therapy Advocates for Diversity (COTAD) Chapter at WNE related to cultural competence and implicit bias to increase their knowledge and awareness on the topic.

Center Information

Center Operations Model

The WNE BEAR PAW Center will utilize a student-run model. A student board (see page 19-20 for more information) will be elected each year to ensure successful operations and transitions from one cohort of students to the next. A small faculty board will provide administrative oversight and coordinate components of the OTD curriculum that will take place at the center (lab experiences, fieldwork experiences, DEx projects, etc.). Additionally, an advisory board will be developed, composed of OTD faculty/administration, WNE faculty/administration, and external community members, to help guide students through challenges, obstacles, and opportunities for growth as the center expands.

Per Massachusetts state law all OT services rendered by student occupational therapists must be performed under the direct supervision of a licensed OT. The

supervising OT will ensure all client encounters are accurately and appropriately documented before co-signing any client notes.

Center Access

Hours

BEAR PAW Center hours to be announced.

After Hours

Students will have access to the BEAR PAW Center only in the presence and under direct supervision of a faculty advisory board member and/or member of the WNE Occupational Therapy Department. Students, at this point in time, will not have access to enter the center by means of passcode (if applicable) or key. This, however, may be reevaluated in the instance of a university- wide policy or department change regarding student keyholding to university property.

With faculty present students will, however, assume responsibility of center upkeep and cleaning duties during non- treatment times. Students are expected to uphold the center's cleanliness and organization on a daily basis. In addition, students will be responsible for inventory, preparation, secure book-keeping, maintaining HIPAA compliance, and much more. Though there are elected student roles that over-see aspects of these tasks described , please note that center upkeep and student responsibilities involve *ALL OTD students* utilizing the center (see page 20-21for more information on student elected roles). If, at any point in time, the student responsibilities within the BEAR PAW Center regarding up- keep or access has fallen below standards, students will receive correspondence from the faculty advisory board and will be addressed on a case- by- case basis.

Center Location & Parking

The WNE BEAR PAW Center is located at 1215 Wilbraham Road, Springfield, MA 0119, on the second floor of Blake Law building at Western New England University.. There is minimal parking at the house and students are expected to park on campus to reserve the driveway for client parking.

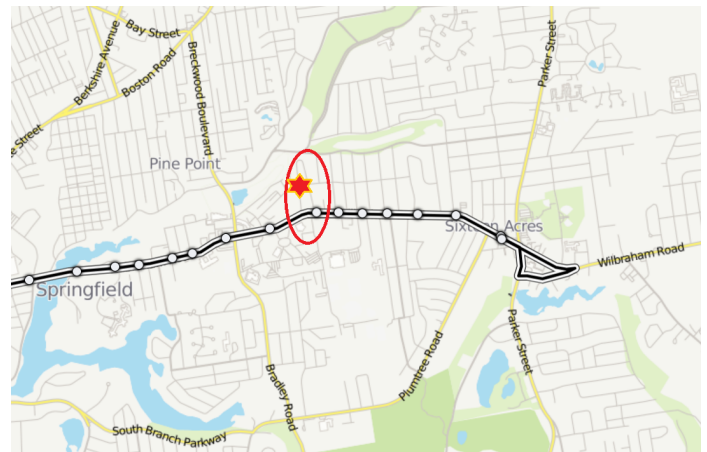
There are various transportation services available to assist in reaching the BEAR PAW Center. One of these services includes the [Pioneer Valley Transit Authority](#) (PVTa) (see Appendix A for full link) which consists of bus, van, and paratransit services. There are several bus stops within close proximity to the BEAR PAW Center. **Bus line B17** makes

several stops on Wilbraham road, the closest bus stop to the BEAR PAW center being Wilbraham/Park (2). The bus schedule can be seen on the PVRTA website by clicking on schedules and maps, locating Springfield Area Schedules, and selecting bus line B17. A map of these stops along Wilbraham road is shown below.

Directions to reaching the WNE BEAR PAW Center after arriving at the Wilbraham/Park (2) stop is as follows:

1. Head west on Wilbraham Road toward Park Lane
2. Turn left onto Upper Loop Road Turn right onto Campus Drive
3. Turn left and Blake Law Center will be on the right

Additionally, the community can utilize [Springfield Partners for Community Action](#) (see Appendix A for full link), which provides affordable transportation services to individuals with disabilities, 65 and older, and veterans. Community members can also use Uber, Lyft, and/or taxi services to get to the WNE BEAR PAW Center.



Center Security

The BEAR PAW Center is a high-traffic area. Please do not leave personal items (i.e. clothing, purses, wallets, jewelry, phones, keys, and personal computers) unattended. The BEAR PAW Center is not responsible for any lost or stolen personal items.

Lost or stolen valuable items (i.e. wallet, phone, keys, computers) will be reported to WNE Public Safety at (413) 782-1207 or police@wne.edu. Any found items will be reported in the Lost and Found Log (location of this log TBD). Non valuable lost items (i.e. water bottles, notebooks, clothes, lunch boxes) may be placed in the BEAR PAW Lost and Found box. After one month, any unclaimed items will be brought to Public Safety's Lost and Found.

If any suspicious activity is witnessed while at the BEAR PAW Center, please contact WNE Public Safety at (413) 782-1207. Suspicious activity can include any incident, individual, objects, or activity that seems unusual or out of place.

Center Inventory

Center inventory will be documented in a shared spreadsheet with the student and faculty board members. The student Operations Coordinator will be responsible for completing biweekly inventory checks. Missing equipment will be recorded on the spreadsheet and reported to faculty board members. The student Operations Coordinator will replenish and/or order new equipment as needed.

Cleaning Protocols

Sanitation Expectations

Equipment will be wiped down before and after each use, as well as at the beginning and end of each day. Students, faculty, and OT staff will be responsible for following the recommended hand washing techniques: after using the restroom and before/after eating. The steps for effective handwashing are as follows:

1. Turn on faucet
2. Wet hands with water
3. Apply enough soap to cover all hand surfaces
4. Rub hands together for at least 20 seconds
 - a. Wash the front and back of hands, in between fingers and underneath nails
5. Rinse hands with water
6. Dry hands completely using a single-use towel or air dry
7. Using a paper towel, turn off the faucet

Before and after working with clients students, faculty, and licensed occupational therapists are required to use a hand-sanitizer. Hand-sanitizer stations will be available for use throughout the center.

Equipment Maintenance

Equipment is expected to be handled appropriately and used for its designated purpose. Equipment will be inspected monthly to ensure each item is in proper working order to ensure the safety of clients during treatment sessions. The student operations coordinator (see page 21 for more details) will be responsible for overseeing the

equipment inspection and reporting any concerns to the other student board members and faculty board members. A work order will be placed if equipment is found to be broken/not in working order immediately or as soon as possible. Student practitioners will be in charge of filling out work orders and receiving faculty approval prior to submitting them.

Housekeeping Expectations

Students and center staff will be responsible for light housekeeping including but not limited to:

- Wiping down counters and surfaces
- Returning items and equipment back to proper location after use
- Sweeping floors
- Dishes
- Trash
- Laundry

Fire & Emergency Evacuation Protocols

Evacuation Procedures

Faculty, center staff, and OTD students are responsible for familiarizing themselves with emergency protocols for the BEAR PAW Center including emergency exits, alternative escape routes, and the designated assembly point. Faculty, staff, and OTD students will also be responsible for being aware of the location of emergency pull stations, fire extinguishers, and other emergency tools. Clients and any guests must be escorted and/or directed out of the BEAR PAW Center to the designated assembly point. At the designated assembly point, attendance must be taken to determine the safety and location of all parties.

In the event of a fire:

- Remain calm and warn others in the general area
- If the fire is small, and you are trained to do so, use the nearest fire extinguisher to put it out
- If the fire cannot be extinguished, call 9-1-1

In the event of an alarm:

- Evacuate the building using the shortest and safest route (see routes below), closing all doors behind you
- Proceed to the designated assembly point (TBD)
- Await instruction from Public Safety and Fire Department
- If smoke and/or fire is blocking an exit, seek an alternative escape route
- At the designated assembly point, attendance must be taken to determine the safety and location of all parties
- If you are unable to evacuate due to smoke or physical restraints, seek a safe area and call 9-1-1

Medical Emergency Protocols

In case of a medical emergency, immediately call 9-1-1 and then assess the scene. The BEAR PAW Center will be equipped with emergency equipment including but not limited to: first aid equipment and an AED device.

Please see the information below for details on the closest and most accessible on-campus and off-campus emergency services:

On- Campus & Off- Campus Direct Medical Assistance	
Center for Health and Wellness On-Call Provider	Available after hours, 24 hours a day, 7 days a week at (413) 519-4055 . For urgent medical concerns leave your name and number and a provider will call you back within 15 minutes. If you do not receive a call within that time, call back.
Center for Health and Wellness: After Hours Urgent Mental Health	Available after Center for Health and Wellness hours of operation, 24 hours a day, 7 days a week at (413) 310-5389 .
Campus Police	Available after Health Services hours of operation, 24 hours a day, 7 days a week for life-threatening emergencies (413) 782-1207 or 911 if you are off campus. Campus Police are first responders and can direct students to the appropriate health care facility, or provide transportation as needed.

AFC Urgent Care	Urgent care center located at 415 Cooley Street, Springfield, MA 01128. Phone (413) 489-5528 . Hours 8:00 a.m. -8:00 p.m. Monday -Friday. 8:00 a.m. -5:00 p.m. Saturdays and Sundays.
Baystate Medical Center	Located within four miles of our campus at 759 Chestnut Street, Springfield MA 01107. This level one trauma center emergency department is open 24 hours a day, seven days per week including holidays. (413) 794-0000 General Information (413) 794-3233 Emergency and Trauma Department
Mercy Medical Center Emergency Department	Within four miles of our campus at 271 Carew Street, Springfield MA 01104. Mercy Medical Center is an acute care medical center open 24 hours a day, seven days per week including holidays. (413) 748-9000 General Information (413) 748-9670 Emergency Department

Additionally, it is a program requirement that all students obtain annual CPR and first aid training and certification. If, in any instance, a student's certification has lapsed without recertification and/or the student has failed to provide documentation of recertification to the Health Services Department of WNE, the student will not be permitted to treat clients.

AED

An automated external defibrillator (AED), will be available in the BEAR PAW Center in the case of a cardiac emergency rescue and stabilization. The location of the AED is TBD ().

Please see below for steps of AED use obtained directly from the American Red Cross:

Steps to Using an AED	
Step 1	Turn on the AED and follow the visual and/or audio prompts.
Step 2	Open the person's shirt and wipe his or her bare chest dry. If the person is wearing any medication patches, you should use a gloved (if possible) hand to remove the patches before wiping the person's chest.
Step 3	Attach the AED pads, and plug in the connector (if necessary).
Step 4	Make sure no one, including you, is touching the person. Tell everyone to "stand clear."
Step 5	Push the "analyze" button (if necessary) and allow the AED to analyze the person's heart rhythm.
Step 6	If the AED recommends that you deliver a shock to the person, make sure that no one, including you, is touching the person – and tell everyone to "stand clear." Once clear, press the "shock" button.
Step 7	Begin CPR after delivering the shock. Or, if no shock is advised, begin CPR. Perform 2 minutes (about 5 cycles) of CPR and continue to follow the AED's prompts. If you notice obvious signs of life, discontinue CPR and monitor breathing for any changes in condition.

(American Red Cross, 2021)

BEAR PAW Center University Supports

Division of Occupational Therapy.....	(413) 796-2100
Office of Information Technology Service Desk.....	(413) 782-1207 helpdesk@wne.edu
Public Safety.....	(413) 782-1207
Emergency Number	(413) 782-1411 police@wne.edu
Facilities Management.....	(413) 782-1556
Buildings & Grounds.....	(413) 782-1248
Copy Center.....	(413) 782-1302
Center for Health & Wellness	(413) 782-1211
Advancement Division.....	(413) 782-1523

Student Information

Student Code of Professional Conduct

Please refer to the [College of Pharmacy and Health Sciences \(COPHS\) Student Handbook](#) (see Appendix A for full link) for policy information related to health clearance, insurance and certifications, immunizations, criminal background checks, code of conduct, discrimination/harassment/sexual misconduct/Title IX Policy information, and all other student expectations and professional conduct.

Responsibilities & Expectations

Treatment of Family Members

Students are expected to notify the supervising faculty member or OT if they are scheduled to work with a family member. Treating family members can impact the therapeutic relationship and quality of care.

Formality in Student-Client Interactions

Student practitioners are expected to maintain professionalism with clients by addressing them by their preferred name (i.e. Mrs. Jones, Bill). Students are required to read over client information to know the client's pronouns and/or ask during the initial evaluation if the client did not specify on intake paperwork.

Interactions with Clients via Social Media

Interactions with clients through social networking systems such as Facebook, Instagram, Twitter, etc. are prohibited. Please see the [COPHS Student Handbook](#) (see Appendix A for full link) for further information on social media policies.

COVID-19 Guidelines

Students are responsible for following the most recent COVID-19 guidelines and WNE health community protocols when at the BEAR PAW Center. Students are responsible for wearing a mask while providing healthcare services.

Interactions with Clients Outside of the Center Setting

Students should refrain from interacting with clients outside of the center setting unless approached by the client first. If approached by a client, students should remain professional and are expected to maintain client confidentiality.

Students are prohibited from participating in intimate relationships with clients.

Attendance

Students are responsible for attending scheduled sessions and should abide by course attendance policies if absence is necessary. The student is responsible for rescheduling with the student schedule coordinator any missed sessions to complete center requirements.

If a client fails to show for an appointment, the student practitioner is expected to complete other center duties or assist peers as needed.

All student practitioners must arrive with ample time to prepare for the arrival of their clients.

Dress Code

Professional attire is expected at all times when in the center . Students working in the center are required to wear the WNE OTD polo shirts and appropriate bottoms (i.e. khakis, black pants, dress pants) and closed-toed shoes. Accessories must be tasteful and project a professional image. Please refer to the [COPHS Student Handbook](#) (see Appendix A for full link) for more detail.

Level 1 Fieldwork

Expectations

Attendance

For level 1 fieldwork, students are required to follow COPHS class attendance and absence policy. Please see the paragraph below for additional information, directly obtained from the [COPHS Student Handbook](#) (see Appendix A for full link):

“In general, excused absences are defined as absences resulting from medical emergencies, sickness, or death in the immediate family. In these instances, the student must provide documentation that attests to the validity of the reason for the absence to the instructor of record within 24 hours of return to campus. Without documentation, the absence is considered an unexcused absence “ (COPHS Student Handbook, 2021).

Student Board

Purpose

The student board will be a vital aspect of maintaining the sustainability of the BEAR PAW Center. Each position is intended to encourage and develop student growth, responsibility, and professionalism within the OTD program as well as enhance each student's clinical experience. Furthermore, student positions are responsible for continued relationships with community partners and connections through interactions with previous student board members, faculty, community partners, community members, and clients. Please see the following section, *Student Positions and Roles*, for a general description of each position.

Each fall semester, new first year students will be provided a handout with brief descriptions of the roles and expectations of each position. Informing the first year students about the BEAR PAW Center's student board early on can increase interest in running for the board in the spring semester. First year students will be invited and encouraged to shadow the current board prior to the spring semester election.

Each year during the spring semester, first year students will be allowed to run for student positions held within the operations of the BEAR PAW Center. Students are expected to present a brief speech as to why they are a good fit for the desired position. The position(s) will be voted on and elected by OTD students. If chosen for a position, the student will act as a chair- elect with the current student responsible for the role. This newly elected student will learn and serve for approximately two semesters (spring and summer) before assuming full and sole responsibility. The purpose of this chair- elect period is to ensure a smooth transition so that the student is fully acclimated and

prepared to take on the role independently. Although each outgoing student and incoming elected student are responsible for the follow-through and delivery of one's role, all students are encouraged to seek and recruit additional help and support from their peers and faculty as needed.

If a student demonstrates difficulty with position responsibility, BEAR PAW Center faculty should intervene providing the student with assistance and/or additional assistance from their peers. If the student continues to demonstrate difficulty maintaining position responsibilities, the faculty and student board will elect a new student to take over.

If, at any time, serving on this board poses a problem to the selected student(s) academia or inhibits academic success in any manner, the student's role will be re-evaluated, as academic success is the OTD program's main focus for each student involved. Should the student(s) serving on the student board ever obtain academic probation, they shall not be allowed to continue with his/her current student board position. Additionally, his/her volunteer hours will be limited in the BEAR PAW Center in order to maintain focus on his/her academics. In this instance, the faculty and student board will elect a new student to take over with assistance.

Please note, that serving in one of the elected positions is an honorary commitment to the university, OTD program, and to the BEAR PAW Center. It is meant to enhance student education and in no way, is meant to replace or disrupt student education.

Student Positions and Roles

Position	Primary Responsibility
Center Coordinator	<ul style="list-style-type: none"> • Liaison between faculty board and student board, SOOTA, COTAD & Inspired Minds • Representative to the OTD department, university, and community. • Oversee all student board positions • Lead the cultural competency forum • Maintain center supplies & center space (ensuring center-upkeep) • Responsible for completing biweekly inventory checks and report concerns to other members and faculty • Ensure adequate staffing for center (students, faculty, licensed practitioners)

	<ul style="list-style-type: none"> • Conduct new student orientation • Maintain supervising practitioners records (copies of updated license, CPR, etc) and client records
Funding Coordinator	<ul style="list-style-type: none"> • Propose annual budget • Oversee center funds • Provide oversight of budget • Collaborate closely with the Advancement Division • Oversee fundraising efforts & donations • Apply to appropriate grants
Community Relations Coordinator	<ul style="list-style-type: none"> • Responsible for BPC scheduling • Market center & promote positive relationships within community • Maintain center social media (website, instagram, etc) • Manage recruitment & referrals • Track client and center outcomes

Fall 2022 Transitional Board Positions	Spring 2023 Permanent Board Positions
Center Coordinator	Center Coordinator
	Operations Coordinator
Funding Coordinator	Funding Coordinator
Community Relations Office	Community Relations Officer

Faculty & Supervisor Information

Purpose

Faculty members and/or licensed supervisors who volunteer to serve in the BEAR PAW Center are responsible for providing direct and indirect supervision to all students

involved at the BEAR PAW Center. Though OTD faculty members are not required to serve in the BEAR PAW Center, they are invited and encouraged to serve and volunteer their time, knowledge, and services. Please see below for a general outline of responsibilities and expectations from faculty members and supervisors at the BEAR PAW Center.

Responsibilities & Expectations
<ul style="list-style-type: none">→ Clinician with at least 1 year of clinical experience→ Active Massachusetts OT license→ Provide supervision of students→ Provide students with clinical learning experiences, such as direct patient care, interdisciplinary collaboration and communication, in-service opportunities→ Provide any necessary feedback→ Address or bring attention to the appropriate OTD faculty if there are concerns regarding student performance→ Promote evidence-based practice→ Comply with all legal, ethical, and professional standards→ Review and co-sign student documentation

Faculty Board

Purpose

While the BEAR PAW Center serves under a student-run model, a faculty board is essential in oversight of the student board to ensure success, provide learning opportunities, and assist in the sustainability of the BEAR PAW Center.

Such oversight consists of maintaining community partnerships, student collaboration with WNE, and overall center operations.

The faculty board will consist of at least two OTD faculty members who will also serve as center supervisors. In addition, a WNE faculty member from a different discipline will

serve on the faculty board in order to incorporate interdisciplinary collaboration within the BEAR PAW Center. This faculty member will volunteer their knowledge, guidance, and expertise while serving on the board.

The BEAR PAW Center is open to any additional faculty members interested in participating on the faculty board. Faculty board members are encouraged to volunteer their services in the clinic a minimum of once a month. This will ensure that faculty have a working knowledge of center operations.

Advisory Board

The BEAR PAW Center advisory board is composed of OTD faculty/administrators, WNE faculty/administrators, and external community members. Members of this board are essential to the success of the BEAR PAW Center as they will oversee the sustainability of the center. The advisory board will meet at least twice per year to discuss the successes, challenges, outcomes, and future of the BEAR PAW Center. Board members will also be responsible for creating partnerships with other colleges and universities to pursue the interprofessional model for the BEAR PAW Center. The goal is to incorporate and involve individuals from a wide variety of healthcare and non-healthcare disciplines on the advisory board to better serve our community.

The faculty board actively seeks members to serve on the advisory board on an ongoing basis and is open to all individuals within the community. Each member of this board will bring a unique perspective and professional experiences to the center. As the BEAR PAW Center continues to develop, specific positions and responsibilities will be established for the advisory board.

Patient Information

Scheduling

All clients must have an appointment to be seen by a student practitioner. Clients are permitted to visit the center to complete intake information and schedule an appointment. Same-day appointments are not guaranteed, however, if there is appropriate staffing, same-day appointments may be possible.

Appointment Reminders

Clients will receive a reminder email prior to their session confirming date, time, and location.

Cancellation & No Show Policy

It is requested that clients provide 24-hour notice before canceling or requesting to reschedule, when possible. If a client fails to attend three or more consecutive appointments without notice, a discharge plan may be discussed between the student and faculty or supervising occupational therapist.

Documentation

Documentation will be completed using the EHR software. Student practitioners are expected to complete all documentation by the end of their scheduled sessions.. After a student practitioner completes their documentation, a supervising faculty member or occupational therapist is required to review and co-sign each note.

Client Charts

Intake forms will be available for clients to complete via paper or electronically. If a client prefers to complete paper documents, students will be required to upload the documents to the electronic chart and shred all paper documents. Clients will be required to provide both a signature and/or e-signature and printed name on documents.

Treatment Plans

Student practitioners are responsible for reviewing and verifying the accuracy of treatment plans when seeing a client for the first time. Clients are required to be included in the development of all treatment plans. Before proceeding, a supervising faculty member or occupational therapist must review and sign off on the treatment plan. No clients should receive treatment without a current, reviewed, and signed treatment plan.

Emergency care can occur without proper documentation of a treatment plan.

Educational Volunteer Consent and Release Form

Before a client's appointment, it must be verified that there is a current, signed volunteer consent and release form on file (see Appendix A for full link). If there is not, consent must be obtained prior to the appointment. Minors are required to have a parent or guardian signature on all documentation. Consent should be obtained from the client at every re-evaluation to ensure up-to-date documentation on file.

Clients may withdraw consent at any time. In this case, the client's chart must be updated with appropriate documentation and the client's withdrawal of consent should be in writing with a signature and date.

Services will not be provided if a client does not have a current consent form on file.

Center Sustainability & Processes

Reimbursement

The BEAR PAW Center will address reimbursement through use of a pro bono model, which offers services on a free or reduced-fee basis without the need of insurance. Clients will be asked to make a small donation to the BEAR PAW Center , if feasible. If clients are unable to make a donation, they will still receive services. Asking for a donation will add value to the services being provided and assist in the center's sustainability. The student Funding Coordinator will be in charge of all center funds including any contributions collected and added to the center's bank account.

Funding

Grants

The student Funding Coordinator will work closely with WNE's Advancement Division when applying for grants and collaborate to determine the number of applicable grants per year.

When applying to external grants, there is an additional step to the application process. Students will be required to complete and send the completed grant application and WNE Approval Form for External Grant Applications to a faculty board member for review and approval. The grant application and WNE external grant application will then be submitted to the office of the COPHS, who will then obtain required approval signatures.

Fundraising

The student Funding Coordinator will work closely with WNE's Advancement Division when planning fundraising events to ensure compliance with the university's regulations. The student Funding Coordinator will be responsible for leading the planning efforts for small scale (i.e. 5Ks, trivia night, BINGO) and large scale (i.e. crowdfunding) fundraisers.

Donations

The student Funding Coordinator will work closely with WNE's Advancement Division when soliciting donations. The Funding Coordinator and Community Relations Coordinator will work collaboratively to solicit small donations from community businesses and/or equipment vendors. The Advancement Division team will be responsible for requesting donations from trustees and alumni for large projects and/or equipment.

Marketing

Flyers & Brochures

Marketing materials, such as flyers and brochures, will be made or updated at least once per year. Flyers and brochures will be available within the center for clients as well as to be provided to community resources interested. Community resources will be asked to display and/or provide marketing materials to their clientele. Flyers and brochures will also be on display when students promote the BEAR PAW Center at any events (town fairs, town councils, etc).

Social Media

When marketing the BEAR PAW Center on all social media platforms (Facebook, Instagram, etc.), students must follow the [COPHS Social Media Policy Appendix R](#) (see Appendix A for full link). The student Community Relations Coordinator will be in charge of keeping all social media accounts active and relevant. Social media accounts should include the development and growth of the center, services and groups being offered, and fundraising opportunities. The student Community Relations Coordinator will also be in charge of responding to any private messages received on any of the center's social media platforms.

Promotional Events

Students will represent the BEAR PAW center at a variety of events such as conferences, town fairs, town council meetings, and WNE campus events. Students will be required to create an informal marketing plan and obtain faculty and WNE approval for each event they attend. Students may decide to provide examples of services offered at the center, give a brief presentation of the center, and/or offer giveaways such as jar openers and/or handheld fidget tools. Students will also have other marketing materials on display (i.e. flyers, brochures). During any promotional events representing the center, students will be required to maintain the center's dress code and professional conduct.

Patient Recruitment & Referrals

Patient Recruitment

The BEAR PAW center seeks ongoing, mutually beneficial partnerships and relationships with community healthcare clinics, businesses, and community resources in order to recruit new clients. Maintaining partnerships with non-healthcare establishments is intended to increase awareness of the OT scope of practice, outreach to prospective clients, and diversity of the centers clientele. The student Community Relations Coordinator is responsible for collaborating with community resources to create a variety of opportunities to recruit new clients.

Referrals

A provider referral is not necessary to attend or receive services at the BEAR PAW Center. Although referral is not necessary, client's are encouraged to share the health information forms with primary providers and specialists regarding health information. The information will remain confidential and be uploaded to the secure EMR system. This is an opportunity to share OT services, goals, and progress made at the BEAR PAW Center.

Community Partners & Support

The BEAR PAW Center will seek to develop partnerships with community resources such as healthcare clinics, senior centers, shelters, social service agencies, transportation services, and other nonprofit organizations. The student Community Outreach Coordinator will oversee all efforts to identify needs in the community, raise awareness about the BEAR PAW Center, and identify potential organizations to partner with. Partnerships with community resources should be mutually beneficial, which will vary on a case-by-case basis and will be detailed in a partnership agreement. Through these partnerships, the BEAR PAW Center can build rapport with the community, increase patient recruitment, and raise awareness of the center's mission.

Community partnerships and support are required to assist in the development, growth, and credibility of the BEAR PAW Center. Therefore, an emphasis should be placed on maintaining long lasting relationships within our community.

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Appendix A

Reference List of Clickable Links

Health Insurance Portability and Accountability Act

Department of Health and Human Services	https://www.hhs.gov/hipaa/index.html
Basic information	https://www.cms.gov/Outreach-and-Education/Medicare-Learning-Network-MLN/MLNProducts/Downloads/HIPAAPrivacyandSecurity.pdf

Family Educational Rights and Privacy Act (FERPA)

U.S. Department of Education	https://www2.ed.gov/policy/gen/guid/fpco/ferpa/index.html
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American Occupational Therapy Association (AOTA) Code of Ethics & Ethically Appropriate Care

AOTA Code of Ethics	https://ajot.aota.org/article.aspx?articleid=2767077
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Educational Volunteer Consent and Release

Volunteer Form.....  Educational Volunteer Consent & Release 060622.pdf

Evidence-Based Practice

AOTA's Evidence-Based Practice & Research	https://www.aota.org/Practice/Researchers.aspx
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Center Location & Parking

Pioneer Valley Transit Authority (PVTA)	http://www.pvta.com
Springfield Partners for Community Action	https://www.springfieldpartnersinc.com/services/transportation-services/

Student Code of Professional Conduct, Responsibilities & Expectations, Level I Fieldwork, Marketing

College of Pharmacy and Health Sciences (COPHS) Student Handbook	https://www1.wne.edu/pharmacy-and-health-sciences/current/WNE-COPHS-Student-Handbook-052421.pdf
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Western New England University
Division of Occupational Therapy

Bringing Equity, Accessibility, and Rehabilitation to
People Achieving Wellness (BEAR PAW) Center

Evidence-Based Sustainability Plan

Created 2021

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Edited 2022

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MEET THE AUTHORS

Morgan Castelbuono, OT/s, is from the Class of 2021 in the Doctor of Occupational Therapy program at Western New England University. She completed her doctoral capstone project on the developmental processes of a student-driven, pro bono university clinic, with a focus on funding processes. This research was in response to the health disparities affecting accessibility to healthcare services in her community. In preparation, she initially researched the accessibility of mental health services, specifically, for low-income, uninsured, and underinsured individuals. Her professional interests include mental health, pediatrics, sensory integration, and inpatient rehabilitation. She enjoys nature, traveling, animals, and spending time with friends and family.

Danielle Whitman, OT/s, is from the Class of 2021 in the Doctor of Occupational Therapy program at Western New England University. She completed her doctoral capstone project on the developmental processes of a student-run, pro bono university clinic, with a focus on reimbursement. Her research aimed to express the need for a pro bono clinic model to increase accessibility to health care services for uninsured and underinsured individuals while also addressing the inequities and disparities of healthcare. Her professional interests include pelvic floor therapy, sex & intimacy, hippotherapy, mental health, and inpatient rehabilitation. Danielle is passionate about community service and is always looking for ways to support her community.

Kelsey Fitzhugh, OT/s, is a 2021 graduate of the Entry-Level Doctorate of Occupational Therapy program at Western New England University. Kelsey completed her doctoral research on the development of a student-run pro bono university clinic, the BEAR PAW House, focusing on the recruitment and referral processes. The overarching goal of her research and capstone project was to explore and co-develop the clinic in order to provide an additional resource and accessible health care services for underserved individuals in her community. Leading up to her doctoral capstone project, she also assessed the role of occupational therapy within college students on campus experiencing stress and anxiety, in hopes that the university clinic could help as well. Following the completion of this project and graduation, she hopes to pursue inpatient pediatrics, specifically in the NICU/PICU setting and is additionally interested in pediatric burns.

Jeffrey Joy, OT/s, is a 2021 graduate of the Entry-Level Doctorate of Occupational Therapy program at Western New England University. Jeffrey completed his doctoral research on the development of a pro bono student-run OT clinic on campus with a

focus on community outreach to increase accessible healthcare services to students and the community. Jeffrey's research interests include mental health, and the underinsured and underserved community. Jeffrey's career interests include orthopedic outpatient, specifically the role of occupational therapy with sports related injuries and upper extremity injuries.

Faculty Mentor

Brittany Adams, OT, OTD, MS, OTR, is a Clinical Assistant Professor at Western New England University in the Entry-level Doctor of Occupational Therapy program. She is the faculty mentor for this group of doctoral students who researched and initiated the process of developing a university occupational therapy clinic. At WNE, she is also involved with developing and instructing faculty-led level 1 fieldwork opportunities and teaching Adult & Aging practice courses.

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Introduction

A sustainability plan is an outline used by groups or organizations to detail plans associated with achieving goals that create financial, societal, and environmental sustainability (Burton, 2021). A sustainability plan is often utilized by businesses or start-up groups in order to make strides in the right direction for growth and to help implement strategies to help them attain growth.

This evidence-based sustainability plan was created with the intention of providing a multi-sectional resource for students, faculty, and/or community partners helping to grow the BEAR PAW Center associated with the [Western New England University \(WNE\) Doctor of Occupational Therapy \(OTD\) Program](#). Within this sustainability plan, readers will find resources, evidence-based ideas, explanations, and directions to consider when exploring and continuing to develop the BEAR PAW Center. As the BEAR PAW Center continues to grow, this can be, and is hoped to be, used as a guide for future researchers to expedite the research and implementation process within the center. As the BEAR PAW Center develops in the future, this sustainability plan is encouraged to be edited by key members affiliated with the center as new goals and ideas are established to help attain these goals for longevity.

Reimbursement

A variety of reimbursement models and the pro bono model were considered in the beginning processes of the BEAR PAW Center. Reimbursement models are billing systems used by healthcare organizations to receive payments from either patients or insurance companies when providing their services, while a pro bono model has a focus on “for the public good” and often offers services for free (DECO, 2019; Derice, 2019). However, some healthcare clinics that use the pro bono model ask for small charitable donations from clients. For example, the Widener University Student-Run Pro Bono Clinic asks clients to donate five dollars per visit if possible, although it is not mandatory (Derice, 2019). The Widener University Student-Run Pro Bono Clinic asks for this donation in order to put a value on the service being offered and to protect the dignity of clients who wish to give what they can (Derice, 2019). Before making a decision about whether to move forward with a reimbursement model or pro bono model a detailed list of pros and cons of each was created. Please see below for the detailed list of the pros and cons of each model.

Pro Bono Model	
Pros	Cons
<ul style="list-style-type: none"> • Small contributions from clients can be used to assist in the funding of the center. • Provide client-centered, holistic care to the uninsured and underinsured. • Increased time with clients • Insurance companies will not dictate discharge or treatment planning. • Avoidance of reimbursement directing care and financial burdens on clients. • A service model will be used, creating a focus on clients. • Physician referrals are not required in MA and therefore, will not be required by the center. • The pro bono model will assist in training the next generation of healthcare professionals to provide humanistic and transdisciplinary health care to underserved individuals. • Serving uninsured and underinsured individuals without creating a financial burden for them. • Addressing health disparities and promoting health equity. 	<ul style="list-style-type: none"> • No reimbursement for services, decreasing revenue. • Decreased revenue for equipment, center operation needs, and center staff compensation. • Students will not gain hands-on experience with insurance companies and their guidelines. • Potential for a decrease in the clients perceptions of the value of care being provided.

Reimbursement Models	
Pros	Cons
<ul style="list-style-type: none"> • Services will be reimbursed creating increased revenue and value of services. • Insurance companies will potentially pay for transportation needs of clients. • There are no longer therapy caps. • Students can work with the OT practitioners can use the KX Modifier when the therapy threshold is met to increase visits. • Students will gain more hands-on experience with insurance guidelines. 	<ul style="list-style-type: none"> • Insurance dictates care by limiting visits and eligibility. • Students and OT practitioners must follow insurance guidelines for billing and other procedures. • Documentation must follow insurance guidelines and students must justify services in order for clients' treatments to be covered. • Even though there are no longer therapy caps, there is now a therapy threshold. Once a client exceeds the therapy threshold they become responsible for the repayment of services. • The KX modifier does not guarantee increased services after the therapy threshold is met. Completing the KX modifier will require more time spent on proving the medical necessity of services for clients. • More time will be spent dealing with insurance guidelines and proving medical necessity than with the clients. • Clients become responsible for payment of care that exceeds the therapy threshold or is not covered by insurance. • The fee-for-service model would limit the scope of clientele that the center could provide services for. For example, uninsured clients would most likely not seek services. This goes against the mission of the BEAR PAW Center. • Physician referrals and

	<p>pre-authorization will be required when working with insurance companies. This could also potentially decrease the scope of clients.</p> <ul style="list-style-type: none"> • Therapy services along with other healthcare services are often expensive and a major financial burden for uninsured clients.
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After reviewing the research, a pro bono model was chosen for the BEAR PAW Center to ensure the needs of the community are met.. As a pro bono center, a majority of the services provided will be free, however, we will ask clients to make small contributions if feasible and when appropriate. Asking for a contribution will add value to the services being provided and assist in the center's sustainability. Since services will be provided for free, insurance will not be billed. Through using a pro bono model, the BEAR PAW Center will address health inequities and disparities by providing services to the uninsured and underinsured individuals living in the surrounding community.

Center Costs

The BEAR PAW Center is a university-owned building meaning all overhead costs (rent, utilities) are covered by the university. This keeps the annual operating costs of the BEAR PAW Center low. The goal of the center is to keep annual operating costs as low as possible. The [estimated budget](#) created in Summer 2021 should continue to be updated as more information is learned relative to center expenses. The student Funding Coordinator will be responsible for oversight of the budget with the support of the faculty board.

Funding

Since the BEAR PAW Center will use a pro bono model, it is crucial to have a comprehensive plan of how the center will be funded long-term without revenue from the services being provided. As previously mentioned, clients will be asked to make small contributions if feasible, however, this will not be mandatory to receive services. Receiving some funding from the university or the Division of Occupational Therapy may be possible, however should not be expected or anticipated. The main sources of funding will come from grants, fundraisers, and donations. A corporate sponsor willing

to support events and fundraisers would be an ideal way to increase revenue, however this requires significant involvement of higher-level university administrators and/or Advancement Division staff members (Ontario Medical Student Association [OMSA], & Canadian Federation of Medical Students [CFMS], 2017).

The student Funding Coordinator from the student board will lead funding efforts and work closely with WNE's Advancement Division (413-796-2259; thefund@wne.edu) as well as the BEAR PAW Center faculty board and student board.

Listed below are various websites that contain a variety of helpful resources on funding:

- Massachusetts Nonprofit Network: [Nonprofit Resources](#)
- Grant Station: [Public Online Education Resources](#)
- [Candid](#)

There is also a shared folder [Webinar Resources](#), within [Funding Resources](#), that includes comprehensive resources that have been collected from webinars attended in 2021.

Grants

The student Funding Coordinator and the Advancement Division will closely collaborate to determine the number of grants to apply for per year. Applying for grant funding can lead to large amounts of funding which is a significant benefit, however, it is not a sustainable source of funding. Relying too heavily on grant funding is not advisable as it may lead to frequently needing to adapt programs in order to meet the granting institution's objectives. This type of inconsistency can begin to negatively impact the center's service delivery and quality of clients care. Grant funding also requires significant administrative efforts including program evaluation, reporting, and grant writing which is time-consuming and could begin to take away from other the center's priorities (Ontario Medical Student Association [OMSA], & Canadian Federation of Medical Students [CFMS], 2017).

When applying for external grants (grants outside of WNE), there is an additional step to the application process. Students will be required to complete and send the completed grant application and WNE Approval Form for External Grant Applications to a faculty board member for review and approval. The grant application and WNE external grant application will then be submitted to the office of the College of Pharmacy and Health Sciences (COPHS), who will then obtain the required approval signatures from university administration.

There should be a significant amount of research and preparation completed prior to applying for a grant. The first step is understanding that a grant is not simply “free money”, it is a sum of money given for a particular purpose and is an investment in the organization.

When researching grants to apply to, it is important to review and understand the guidelines and eligibility criteria of each grant, along with the mission and objectives of the funder to ensure they align with the goals and overall philosophy of the BEAR PAW Center. Keep your research organized in this [Grant Prospects](#) document so important grant information can be easily identified, such as application requirements and deadlines. The Grant Prospects document includes information currently obtained (as of June 2021) on potential grants that the BEAR PAW Center may be eligible to apply for. Each grant listed in this document should be thoroughly researched to review the specific guidelines and application requirements to confirm eligibility. This document should be kept up to date as grants are applied for.

When writing a grant proposal or application, focus on the needs of our community and how the BEAR PAW Center aims to meet those needs, along with any evidence to support the identified need. Try not to focus on how the organization as a whole needs money to continue to operate, instead focus on a specific project or program that will contribute towards meeting the needs of our community.

Do not lose hope if grant applications are declined, as grants are very competitive. Many foundations want to see an organization successfully fulfilling their mission before awarding any grants (Mauldin, 2021).

Refer to the [Grant Writing 101 Supplemental Handout Package](#) or other resources in the [Webinar Resource](#) folder for more comprehensive guidelines and helpful tips.

Donations

At WNE, any monetary donation without giving anything to the donor in return is considered **a gift**. All gifts must go directly to the Gift Processing Office that day to be recorded into their database. The Gift Processing Office will likely not accept gifts from students and will likely need to be brought over by the director of the OTD program, which as of June 2022 is Dr. Brittany Adams..

Prior to receiving **any** gifts/donations, the center must have a **gift account** which must be opened through the Controller’s Office. In order to open a gift account, an event must

be planned with a projected revenue of over approximately \$1,000. This process of opening a gift account will unfortunately not be able to be done by students and will likely require the efforts of the COPHS Assistant Dean for Student Affairs, which as of 2021, is currently Dean Spooner.

After a gift account has been created, there is the possibility to create a crowdfunding website with the Advancement Division. The director of the OTD program and the COPHS Assistant Dean for Student Affairs would need to lead the crowdfunding efforts. Once a crowdfunding website has been developed, it must be linked to a webpage (such as the WNE OTD web page linked in the introduction) and then it would be the responsibility of the BEAR PAW Center student board to share the crowdfunding page to solicit donations. The Advancement Division would need the information of all donors not already in their database. A Google Sheet should be created for interested donors so all necessary information is collected in one donor database that can then be given to the Advancement Division once the BEAR PAW Center is ready to move forward with creating a crowdfunding page. There are some donor/fundraising platforms (e.g. [Give Lively](#)) that are free for nonprofits, however, any platform would need to be approved by the Advancement Division and/or additional university administrators prior to use.

Non-monetary donations, such as products for community outreach events (e.g. hygiene and menstrual products) or prizes for fundraising events (e.g. five \$5 gift cards), are not considered gifts since they will be given away and therefore would not need to be reported to WNE, unless the donation is of significant worth. The BEAR PAW Center would just be responsible for the donor's requirements (e.g., Store Donation Form).

Thank you messages should be sent out to all donors, small and large, to fully express gratitude from the BEAR PAW Center. Handwritten messages add a personal touch that leaves a positive impact, especially for first-time donors and large-scale donors.

Deepening relationships with donors is especially important to increase retention rate of donors. Additional ways to maintain and deepen relationships with donors include:

- Track birthdays on donor database (mentioned above) and send birthday cards
- Send a BEAR PAW Center thanksgiving card with a message expressing gratitude
- Sending out a newsletter once per semester sharing accomplishments of the center with upcoming programs, events, and fundraising goals
 - While newsletters are now more often sent out electronically, do not overlook the option of mailing out a hard copy, as many individuals prefer this

Ideas and Recommendations:

- Contact local establishments, businesses, or other nonprofit organizations using the [Donation Request Script Form](#) drafted by Dr. Adams' 2021 DEx Group. Connecting with businesses to ask for donations (e.g., paint, flooring, furniture) or discounted services may greatly assist with the renovation costs for the BEAR PAW Center.

Please see below for ideas and recommendations for donations in the future. Please note that this is a small list containing three potential establishments/businesses in each category, and it is encouraged to reach out to more than the listed organizations and businesses.

Potential Places to Contact for Donations in Hampden County, MA		
Donation Type	Establishment/Business	Contact Information
Paint	<ul style="list-style-type: none"> • Clark Paint Factory • Paint Perfect Inc. • Sherwin-Williams Paint Store 	<ul style="list-style-type: none"> • 966 Union St, West Springfield, (413) 733-3554 • 117 Park Ave, West Springfield, (413) 735-9288 • 670 Boston Rd, Springfield, (413) 783-6182
Flooring	<ul style="list-style-type: none"> • Allied Flooring and Paint • Cummings Floor Covering • Hampton Flooring Center 	<ul style="list-style-type: none"> • 350 Main St, Agawam, (413) 233-3100 • 34 Front St, Indian Orchard, (413) 783-1101 • 250 Northampton St Ste E, Easthampton, (413) 517-8003
Furniture	<ul style="list-style-type: none"> • Broadway Office Brokering Service • Planned Furniture Promotions 	<ul style="list-style-type: none"> • 90 Tapley St, Springfield, (413) 734-8911 • 9 Moody Rd Ste 18 Bldg D, Enfield, (860) 749-1472

	<ul style="list-style-type: none"> • Eddie's Furniture 	<ul style="list-style-type: none"> • 856 Hampden St, Holyoke, (413) 533-0166
Clothing	<ul style="list-style-type: none"> • Mimi's Consignment Boutique • Goodwill • Salvation Army 	<ul style="list-style-type: none"> • 54 Shaker Rd, East Longmeadow, MA 01028 • 473 Sumner Ave, Springfield, MA 01108, (413) 785-1579 • 170 Pearl St, Springfield, MA 01105, (413) 733-1518

Fundraising

The student Funding Coordinator will work closely with the faculty board, WNE, and the Advancement Division when developing fundraisers with the student board. The student Funding Coordinator will be responsible for leading the planning efforts for small-scale and large-scale fundraisers with the support of the student board. The student board will ask OTD students to volunteer for specific fundraiser events which will count towards their volunteer commitments.

The student Funding Coordinator should expect planning for the first fundraiser to take at least six months. Comprehensive paperwork must be created for each event in collaboration with the Advancement Division.

Each year, a fundraising goal should be determined based on ongoing operating costs, anticipated large expenses, and program ideas that will require funds. After each fundraising event, the student Funding Coordinator should document the success of the event. Consider how the event went overall, how much money was raised, how many people participated, if the effort was worth the reward, if any community relationships were built, and what changes could be made to improve the event. Even if the event did not bring in as many donations as anticipated, if the event raised awareness of the mission and purpose of the BEAR PAW Center or if an important connection was made with a community donor, then the event may have still been a success. These

considerations should be discussed when deciding if an event should be held again or how it could be improved to increase potential for future success.

After the first year of fundraising, past fundraising events should be analyzed annually for planning purposes, as well as for outcomes data (Mauldin, 2021).

The student Funding Coordinator should consider creating an annual Organizational Fundraising Plan and Fundraising Activities Calendar (pages 2-4 of the [How to Create a Fundraising Plan That Works handouts](#)) to maintain organization and effectively plan each event. Include the planning process and follow-up process (e.g., thank yous) in the Fundraising Activities Calendar and try to spread out events as possible, avoiding events right after the holidays.

The student Community Relations Coordinator and Funding Coordinator will collaborate to update the social media accounts with shout outs to everyone that participated in fundraisers and an estimated amount raised (i.e., over \$200). A social media post should also be created when a fundraiser for a specific piece of equipment was purchased (i.e., driving simulator purchased with fundraiser money) or if enough money was raised to implement a new program.

Marketing fundraisers will be essential to their success. The BEAR PAW Center's Social media should market and provide details of all fundraising events. Market the purpose of each fundraiser so potential donors know what their money will be used for (i.e., make it personal). Each fundraising event could have its own unique and creative hashtag to be included in relevant posts. Posts should be planned for high traffic times on social media which are Tuesdays and Thursdays between 5 and 6 pm (Payne & Stauffer, 2021).

The student Funding Coordinator and/or student Community Relations Coordinator should also create a WNE University Post and find other ways to market events to the community. Fundraising events can be marketed to the community through the use of flyers, newspaper advertisements, social media, and community partners. Once there is a donor database, email blasts can be sent out to invite donors to events.

Ideas & Recommendations:

See below for detailed fundraising ideas. If a fundraiser description mentions small gifts these may include BEAR PAW Center stickers, gift cards to local restaurants, and other small items.

An important consideration to remember when planning fundraisers is that any “game of chance”, including but not limited to raffles, 50/50s, BINGO, requires a permit through the town. Each town operates differently but typically requires a completed application and a permit fee.

<p>Softball Tournament In-person</p>	<p>A softball tournament can take place at WNE athletic fields and will be open to all students, friends, and family members. Each team will be responsible for bringing their own equipment while the BEAR PAW Center will provide softballs and a championship trophy. The student board will develop the rules for the game and provide them to each team participating. The fee to enter the tournament will be \$50 with 10 people on each team (\$5 per person). To increase the funds being raised the BEAR PAW Center could also sell food and drinks to guests of the event.</p>
<p>Car Wash In-person</p>	<p>A car wash can take place at the BEAR PAW Center or in the Blake parking lot. The student board will be responsible for asking OTD students to volunteer at the car wash. Volunteering could be holding signs to market the car wash, washing cars, and/or collecting money. The car wash will be open to the public and cost \$5 per car.</p>
<p>Pie-in-the-Face In-person</p>	<p>This fundraiser can be specific to the OTD department or campus-wide. The student board would ask faculty members to volunteer to get pies in the face. This event can take place anywhere on campus depending on what faculty volunteers. This fundraiser will be more costly due to purchasing/making pies.</p>

	<p>The cost per pie will be \$6. Marketing this event during a stressful time of the year (i.e. midterms, finals) could increase participation.</p>
<p>Restaurant Percentage Night In-person</p>	<p>The student board should reach out to local restaurants about percentage nights. Typically, during percentage nights the restaurant will give a certain percentage of sales to the fundraiser. However, this only includes sales from parties who show a flyer stating they are there for the fundraiser. Therefore, it's essential for the student board to make flyers to hand out to WNE students, faculty, and the community.</p>
<p>5K Virtual or In-person</p>	<p>In-Person</p> <p>A 5K can also take place on campus. The student board can also make the 5K themed, for example, a Halloween 5K where racers dress in their Halloween costumes. Other themes may include glow in the dark or color runs. The student board will need to ask OTD students to volunteer. Volunteering can include registration, collecting money, setting up the route, and/or water stations.</p> <p>Virtual</p> <p>For a virtual 5k, participants will select a distance, sign up and pay the registration fee. The student board will decide how long the participants have to complete the 5k (i.e one day, one week). Once participants complete their race they will post their times online. Come for a run and Run Sign up are two programs that create virtual runs.</p>

	<p>The 5K can be open to the public and cost around \$10-15 per person.</p>
<p>Trivia Night Virtual or In-person</p>	<p>In-Person Trivia Night could occur at the BEAR PAW Center or a restaurant partnership can be created. Many restaurants will allow for trivia nights to occur once a week. This brings in revenue for the restaurant and provides a fun atmosphere for the trivia night. The student board will be responsible for creating the trivia questions and providing small gifts to the winners.</p> <p>Virtual Trivia Night can also take place over Zoom. The same event but in the comfort of their own homes. Participants will be given an allotted time to write their answers in the chat box. The zoom host will disable the chat box view for participants.</p> <p>To enter the trivia game, guests must pay \$2 individually or \$4 per group.</p>
<p>BINGO Night Virtual or In-person</p>	<p><i>Prior to planning a BINGO night, must apply for a permit (see above) or consider doing a buy-in or donation to play with no reward.</i></p> <p>In-Person BINGO Night can take place either in the BEAW PAW Center or on-campus in Blake depending on the number of participants. The student board will be responsible for creating the BINGO cards and providing small gifts to the winners.</p>

	<p style="text-align: center;">Virtual</p> <p>Virtual BINGO will occur over Zoom and be very similar to typical BINGO.</p> <p>BINGO cards will cost \$3 for one, \$5 for two, or \$9 for four.</p>
<p style="text-align: center;">BEAR PAW Center Gala Virtual or In-person</p>	<p style="text-align: center;">In-Person</p> <p>A BEAR PAW Center Gala would be a costly event that has the potential to raise a significant amount of funds and connect with donors and supporters of the BEAR PAW Center. To make this event more exciting for guests, there can be a theme (masquerade, Great gatsby, etc). The amount to enter the Gala would be based on the location costs. However, anywhere from \$25-50 per ticket. During the gala, there are other opportunities to raise funds as well. For example, raffles, silent auctions, and donation boxes would be available throughout the night.</p> <p style="text-align: center;">Virtual</p> <p>Please see the Hosting a Virtual Gala: Six Steps to Success ebook.</p>
<p style="text-align: center;">Apparel Virtual or In-person</p>	<p>With the approval of the WNE marketing department, an apparel fundraiser could be done. This should be discussed with SOTA to ensure the BEAR PAW Center's fundraiser does not interfere with SOTA's. Similar to SOTA, students and faculty can bring into apparel they would like to have the BEAR PAW Center name and logo on. Eventually, the BEAR PAW Center could also offer this service to community members who are interested as well. To determine the price a discussion with</p>

	SOTA should occur to learn more about the process.
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For additional fundraiser ideas, check out the resources on [Fundly](#).

Corporate Sponsorship

As previously mentioned, corporate sponsorship is another way to bring in revenue to the center. University administrators would need to lead these efforts however the student board may be able to assist with the initial research. Corporate sponsorships are mutually beneficial however the benefit to the for-profit sponsor should not outweigh the benefit to the non-profit, the BEAR PAW Center. Corporate sponsors contribute financially and support events and fundraisers without substantial gain in return. Typically nonprofits that have a corporate sponsor will acknowledge their sponsor on marketing materials and during fundraising events, however, would not advertise for the business or endorse their products to avoid making the contribution taxable income (Gauss, n.d.; National Council of Nonprofits, n.d.). The details of the sponsorship would be negotiated and outlined in a formal contract.

Community Outreach

Community outreach will be an effective method to sustain the services the BEAR PAW Center has to offer. Utilizing community outreach to identify the needs within the community will allow the BEAR PAW House to effectively provide resources and services to fulfill the needs of its clients. Not only will community outreach be an effective way to identify needs within Hampden County, but it will also help increase the credibility of the BEAR PAW Center. An increase in credibility creates the potential for organizations to donate equipment, food, money, etc. One effective method for community outreach would be to attend chamber of commerce meetings in Hampden county where students can network to identify needs of the community and raise awareness of the services the BEAR PAW Center can provide. Another effective method for community outreach is to send the [Hampden County Community Resource Survey](#) (created by 2021 student researchers) to various locations such as general community resources, food assistance, healthcare facilities, and community social service agencies to identify any needs they currently need help with. Please see an infographic of the Hampden County Community Resources survey below:

Direct Community Quotes

"Are There Any Unmet Needs You Feel Our Community Can Benefit From"

How BEAR PAW House Can Help

"Housing. Every person that comes in looks to get an apartment"



Housing Instability

- Assistance locating shelters
- Provision of resources of finding a house

"Yeah, education for for domestic violence, mental health and substance abuse"



Education

- Self care skills
- Strategies to cope with and reduce stress and anxiety

"We have a lot of patients who struggle to find services for mental health, physical therapy (they are very under served)"

"We struggle with serving bilingual individuals"

"Rides to and from doctors appointments"



Resources

- Assisting with locating transportation services, translation services
- Provision of resources to cope with mental health disorders

"Youth (teen) and young adult programs"

"Mental Health and Substance abuse"

"In house informative groups"



Support Groups

- Conducting focus groups to discuss mental health and substance abuse and identify healthier habits and routines

Transportation

Transportation can be a barrier for clients who are in need of services at the BEAR PAW Center, which can affect the sustainability of the center due to clients' inability to attend appointments. The Community Outreach Coordinator can reach out to transportation services to set up contacts and apply to transportation grants to help clients go to and from the center. For example, Lyft offers a grant called *LyftUp Community Grant*, where Lyft grants \$1,000 - \$3,000 in credit to an organization every quarter. In addition, the transportation department at Western New England University offers vans and automobiles for the faculty and students to use within a 100 mile radius to carry out educational and administrative goals. If clients are unable to travel to the Bear Paw Center, telehealth services are available for residents that live in Connecticut and/or Massachusetts based on faculty supervisors Occupational Therapy License of practice provisions.

Patient Recruitment & Referrals

Community partnerships will be a key aspect in the growth and sustainability of the BEAR PAW Center, as well as a key aspect of active patient recruitment and referral processes. According to the American Occupational Therapy Association (AOTA), marketing and partnerships are a key aspect of advertising an academic clinic and can include seeking help from the school's marketing advisor by creating flyers to drop off on campus, in the community, local medicine practices, schools, day care centers, hospitals, pediatric offices, or other locations that might attract individuals in need of occupational therapy services (Gaffney, 2019). These establishments listed, among others, are prime examples of establishments to partner with in the future.

Please see below for more detail on student involvement, patient recruitment and partnerships, and referral concepts for future success.

Student Involvement

To ensure consistency and efficient patient recruitment into the BEAR PAW Center, the *Community Relations Officer* position within the Student Board of the BEAR PAW Center will lead these efforts. Though this student is expected to lead in this role, the BEAR PAW Center student, faculty, and advisory board members are encouraged to seek ongoing patient recruitment and referral opportunities to better serve the

community. Please see pages 19-22 of the BEAR PAW Center manual for more detail, however see below for direct roles of this individual:

Direct Roles of the Community Relations Officer
<ul style="list-style-type: none">• Market the center & promote positive relationships within the community• Maintain the BEAR PAW Center's social media (website, Instagram, etc)• Manage recruitment & referrals• Track client outcomes and the BEAR PAW Center's success
<i>*Additional roles may be added as the needs and responsibilities of the BEAR PAW Center changes*</i>

In addition, the WNE OTD program currently has various partnerships within the community for student community service through the Student Occupational Therapy Association (SOTA), and students are encouraged to recruit individuals and families through these opportunities as well.

Patient Recruitment & Partnerships

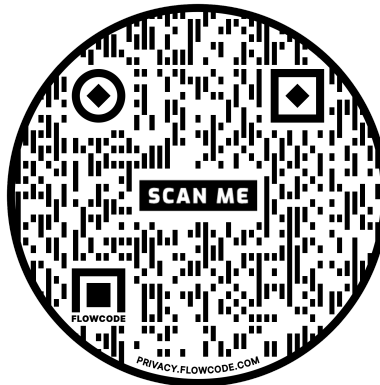
The BEAR PAW Center seeks ongoing, mutually beneficial partnerships and relationships with community healthcare clinics, businesses, and community resources in order to recruit new clients. To assess this, establishments within Hampden County, MA, were issued a student researcher-designed survey in which the majority indicated they would potentially issue referrals to the center if provided with more information, as well as a general interest from the community in the BEAR PAW Center. In addition, maintaining partnerships with non-healthcare establishments is intended to increase awareness of the OT scope of practice, outreach to prospective clients, and diversity of the BEAR PAW Center clients.

One idea for patient recruitment and partnerships is to target additional nonprofit organizations to establish a connection through mutual goals. Nonprofit organizations focus around working together for a common good and transform shared beliefs into actions for the community (National Council of Nonprofits, 2020). With there being 29,983 thousand nonprofit organizations in the state of Massachusetts and two state associations for nonprofits, there is a high potential to create relationships with the

common goal of promoting health equity (National Council of Nonprofits, 2020). Please see below for a list of nonprofit organizations within the state of Massachusetts for potential partnerships:

MA State Nonprofit Organizations		
Name	Phone Number	Website
Massachusetts Nonprofit Network	(617) 330-1188	www.massnonprofitnet.org
Providers' Council	(617) 428-3637	www.providers.org

For a complete detailed list of nonprofit organizations in Hampden County, MA and contact information, please follow the QR code below (TaxExemptWorld, 2021):



Additional Ideas:

- Contact locally employed alumni to recruit and directly refer clients to the BEAR PAW Center
- Partner with WNE Marketing/Advertising students to collaborate on website design, flyer designs, and social media promotion techniques to increase clientele
- Offer a ribbon cutting ceremony with local news station to raise awareness throughout community with brief description mission, values, and purpose of the center
- Offer open houses and tours (both physically and virtually on the website) of the BEAR PAW Center for community (see *Open Houses & Tours* section)

Referrals

In Massachusetts, occupational therapists are not required to obtain a referral for each client in order to provide services. Though it is encouraged, if a completed referral is unattainable, the client will still be eligible to receive services.

As it stands, the BEAR PAW Center continues in its growth stage and currently does not have active referral partnerships with community establishments. However, the researchers have adopted and adapted a referral form to utilize. The BEAR PAW Center referral form was created and intended for ongoing use in order to ensure best practice. Please see below for additional information on the BEAR PAW Center referral form.

BEAR PAW CenterReferral Form Details	
Adopted from:	JaySTART Clinic
Adapted by:	Dr. Adams, Morgan Castelbuono, Kelsey Fitzhugh, Jeffrey Joy, & Danielle Whitman (Class of 2021)
Who is this to be completed by?	Client's practitioner
What happens when this form is received?	This form and client's information is uploaded into the BEAR PAW Center'selectronic health record system (EHR)
What happens after the form is received and uploaded?	Shredded for confidentiality and patient protection
Additional benefits of this referral form:	<ul style="list-style-type: none">• Allows the referring practitioner to request records of the OT services provided following the client's initial visit• Establishes or increases communication regarding client;'s progress and with new or established partnerships• Encourages interprofessional collaboration and transparency with referring establishment• Creates a well defined and operated referring and organizational system focused on patient confidentiality and

	easy transitions
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For future referrals to the BEAR PAW Center, one idea is to explore other medical centers and clinics within Hampden County and the surrounding community that utilize a sliding-scale model. This, also known as a variable rate, refers to residents needing to pay only what they can afford for services ,and/or receive free services if their income is low enough (McNamara, n.d.). It is important, though, to make these establishments aware when discussing potential referrals to emphasize the aspect of a mutually beneficial experience so that the corresponding establishment does not see the BEAR PAW Center as competition, but rather a partner in promoting health equity within the surrounding community. Please see below for a small list of medical centers and clinics in Hampden County, MA.

Community Clinics in Hampden County, MA			
Name	Phone Number	Address	Additional Information
Baystate Brightwood Health Center	(413) 794-4458	380 Plainfield St., Springfield, MA 01107	“Offers an onsite pharmacy and a sliding fee scale for people who are struggling with paying their medical bills” (McNamara, n.d.).
Baystate Mason Square Neighborhood Health Center	(413) 794-3710	11 Wilbraham Rd., Springfield, MA 01109	
Caring Health Center	(413) 739-1100 (413) 739-1100	1040 Main Street, Springfield, MA 01103 532 Sumner Avenue, Springfield, Massachusetts	“This health and dental center has two locations in Hampden County Massachusetts. They are listed below. Access basic checkups, referrals,

			immunizations, and other medical services. Referrals to specialist care are offered too” (McNamara, n.d.).
Holyoke Health Center	(413) 420-2222	203 Exchange Street, Chicopee, Massachusetts 01013	“Call the health center for various social services. Numerous doctors, nurses, and other medical professionals are on site, and some volunteer their time and services too” (McNamara, n.d.).
Holyoke High School, Teen Clinic	(800) 286-8221	500 Beech Street Holyoke, MA, 01040	
New Hope Community Health Clinic, Evangelical Covenant Church	(413) 782-5219	915 Plumtree Road Springfield, MA, 01119	“Some basic health care is offered at this site. The low income, unemployed, and others may qualify for some free services” (McNamara, n.d.).
Open Pantry Community Services, Inc.	(413) 737-7062	287 State Street Springfield, Massachusetts 01105	
Sisters of Providence Health System	(413) 748-9064	271 Carew Street	

		Springfield, Massachusetts, 01104	
Springfield Department of Health and Human Services	(413) 787-6744	93 State Street, 1st floor Springfield, MA, 01103	“A number of medical, health, and dental care programs are offered. They can also refer individuals to federal and state of Massachusetts health care options, such as Medicaid and Medicare. The government office administers other social services too” (McNamara, n.d.).
Wing Memorial Hospital and Medical Centers	(413) 267-9101 (413) 589-0583	2 Main Street Monson, Massachusetts 01057 34 Hubbard Street, Ludlow, MA, 01056	

Marketing

All marketing strategies should be planned and targeted to fully optimize the BEAR PAW Center's resources and budget as well as student and faculty time. The student board should work directly with the WNE Marketing Department to ensure all school policies and regulations are being followed. The BEAR PAW Center should be marketed to local communities within Massachusetts and Connecticut, WNE community, and incoming OTD students to ensure equitable services and educational opportunities are offered to various populations.

Word of Mouth

Word of mouth refers to talking or sharing information with clients, community members, or colleagues. This is a commonly used form of marketing strategy that can be utilized for client recruitment and BEAR PAW Referral. Clients should be encouraged to share the BEAR PAW Centers and its services to their family, friends, and peers. As the Center continues to offer the high-quality service they advertise, more clients will be inclined to spread the word of the center.

Ideas & Recommendations:

- Provide clients with marketing materials displaying the Center's service while taking into consideration varying health literacy levels

Marketing Materials

Marketing materials (flyers, brochures, business cards) must be developed in collaboration with the WNE's Marketing Department. Marketing materials should be available within the center for clients and shared with community resources. Community resources (homeless shelters, doctors' offices, social services offices, senior centers) will be asked to display and/or provide marketing materials to their clientele. Flyers and brochures will also be on display when students promote the BEAR PAW Center at any events (town fairs, town councils, conferences, etc).

All marketing materials produced should follow the [WNE Style Guide](#) and [WNE COPHS Graphic Standards Guidelines](#), as well as any additional [WNE marketing guidelines](#) to maintain consistency and the WNE brand.

Promotional Events & Presentations

Students will represent the BEAR PAW Center at a variety of events such as conferences, town fairs, state fairs, town council meetings, and WNE campus events. Students will be required to create an informal marketing plan and obtain faculty and WNE approval for each event they attend. Students may decide to provide examples of services offered at the center, give a brief presentation of the center, and/or offer giveaways such as jar openers and/or handheld fidget tools. Students will also have other marketing materials on display (i.e. flyers, brochures, business cards).

Ideas & Recommendations:

- Setting up a table at local events (blood pressure screenings, vision screenings, etc.)
- Contact BIG E for potential booth set up
- Target sporting events (Thunderbird events, college sporting events and tournaments, high-traffic volume events etc.)
- Senior Health and Safety Fair
- Professional presentations at town councils and chamber of commerce meetings.

Visiting Community Resources

Visiting community resources (homeless shelters, food pantry, community centers) will be essential to the sustainability of the BEAR PAW Center . Visiting community resources will allow students to build connections and trust with community members while also marketing the BEAR PAW Center . When recruiting it is necessary to focus on the site and/or clients needs to ensure client centered care. Marketing the BEAR PAW Center can be done by leaving marketing materials with the community resource to hand out and/or hang up. Additionally, the BEAR PAW Center could be marketed through apparel (t-shirts, sweatshirts) worn when visiting community resources.

Ideas & Recommendations:

- Food Pantries
- Homeless Shelters
- Soup Kitchens/Meal Sites
- Senior Centers

- Vocational Rehabilitation
- Support Groups

Social Media

Social media (facebook, instagram, twitter, etc) accounts should be developed in collaboration with Justin Eck - OTD Instructional Technologist, the OIT, and Marketing departments. The student Community Relations Coordinator will be in charge of keeping all social media accounts active and relevant . Social media accounts should include the development and growth of the center, services and groups being offered, and fundraising opportunities. The student Community Relations Coordinator will also be in charge of responding to any private messages received on any of the center's social media platforms.

The BEAR PAW Center website should also be developed in collaboration with Justin Eck, the OIT and Marketing departments. The website should contain more in-detail information about the BEAR PAW Center including but not limited to social media handles, mission and vision statements, services and groups, contact inquiry form, and fundraisers. The student Community Relations Coordinator will also be in charge of updating the website as well as responding to any emails.

Ideas & Recommendations:

- Fitness challenges or #MovementMondays
- #WellnessWednesdays
- #MentalHealthMondays
- #SelfCareSundays

Local News, Radio, & Newspapers

Local Newspapers, Radio, and News stations should be contacted in order to market the BEAR PAW Center on a larger scale. Before contacting any of the above departments approval must be given by WNE administrators and the marketing department. Local newspapers, news, and radio stations should advertise not only the Center and its services but also any public fundraising ideas and other events.

Ideas & Recommendations:

- [Local Radio Stations](#)

- [Western Mass News](#): reports local stories and offers advertising for their station
- MassLive
- Town Newspapers

Open Houses & Tours

The BEAR PAW Center will make the OTD program more marketable and desirable to prospective students. Therefore, the BEAR PAW Center should be used as a marketing tool by including it within tours and holding events such as open houses within the center.

High School Students

The BEAR PAW Center has the potential to allow high school students to learn more about occupational therapy while receiving observation hours. Simultaneously, this will be marketing the BEAR PAW Center and OTD program to future students as well as their families and friends. Allowing high school students to observe in the BEAR PAW Center will also be another way to give back to the Hampden County community. It will also create opportunities to partner with local schools and who may allow for unique marketing opportunities.

BEAR PAW Student Orientation Requirements

Every OTD student attending the Center will have to go through student orientation. This orientation will clearly state program expectations, requirements, and additional suggestions of the BEAR PAW Center. Students must complete all requirements before working with any clients.

Below are additional requirements and suggestions of the BEAR PAW Center:

BEAR PAW Center Manual	Students are required to review the BEAR PAW manual to learn important information pertaining to the Center's policies and procedures.
Culturally Sensitive & Competent Care Educational Resources	The Center has a culturally sensitive and competent care educational resource. Students will be required to review documents from this list. There will also be a list of suggested sources for students to read and use when

	working with clients.
The Coalition of Occupational Therapy Advocates for Diversity (COTAD)	Students serving in the center will also be required to attend a minimum of two events per year organized by COTAD. Events must be related to cultural competence and implicit bias to increase their knowledge and awareness of the topic.
Family Educational Rights and Privacy Act (FERPA)	During orientation, students will become aware of what FERPA is and the regulations they set forth for students.
Health Insurance Portability and Accountability Act (HIPAA)	Students will be required to complete HIPAA training and compliance forms before participating in any center operations.
American Occupational Therapy Association (OTA) Code of Ethics	Students are required to review the AOTA Code of Ethics before starting in the center.
Electronic Medical Records (EMR) *Currently waiting for OIT's approval for Billing Dynamix *	All students will require training on how to utilize the BEAR PAW EMR systems. No fee for using this system in exchange for a monthly 500-word article about anything for their blog .

Student Board Positions

Outlined in the manual are Student Board positions created with the intention of upholding the operational aspect and to promote the student-run aspect of the center. In doing so, five positions were created: Center Coordinator, Schedule Coordinator, Operations Coordinator, Funding Coordinator, and Community Relations Officer. Further outlined in the BEAR PAW manual, each student leader in these roles, respectively, is in charge of upholding specific duties to ensure efficiency. Leaders in these positions are allowed, upon review, to recruit additional help through other students and faculty if needed. Please see below for recommendations and ideas for the future success of the Student Board.

Recommendations for future success of the Student Board:

- Adjust positions if there are too many or too little responsibilities being upheld
- Utilize anonymous surveys quarterly to assess the operational aspect of Student Board leaders and participants
 - Have Student Board leaders self-evaluate his/her role
 - Create or adopt (following permission) a self-evaluation form. Please see below for a link to a [Individual Board Member Self-Evaluation](#) form (taken from [Free Management Library](#)).
- Hold in-person and/or Zoom meetings to ensure agreement on important decisions and concerns of the BEAR PAW Center
- Look into potentially rewarding Student Board leaders for their continued excellence in order to gain a positive outlook and demonstrate the privilege of holding a Student Board position
- Replicate current SOTA procedures with SOTA Member of the Month and display Student Board members photo:
 - Example: BEAR PAW Board Member of the Month/Quarter/Semester; BEAR PAW Center Student Volunteer of the Month

Fall 2022 Transitional Board Positions	Spring 2023 Permanent Board Positions
Center Coordinator	Center Coordinator
	Operations Coordinator
Funding Coordinator	Funding Coordinator
Community Relations Office	Community Relations Officer

Educational Value

Student-Run Center

The BEAR PAW Center offers a new environment for students to learn and observe hands-on experiences with clients from the community. Research supports the positive educational impact on students who participate in academic clinics. Occupational therapy students who have participated in academic clinics have increased comfort levels when building rapport and establishing a therapeutic relationship, therefore, facilitating their ability to create more client-centered interventions (Rogers et al., 2017).

Student-run clinics not only assist in developing occupational therapy skills but also professional skills such as leadership. The Center allows for students to gain leadership and confidence through the center operations and student-client interactions. The student board offers individuals the opportunity for increased leadership within the OTD department. The [student board](#) (please see pages 19 & 20) will provide opportunities for leadership roles where students gain experience in center operations while simultaneously developing their leadership skills. Not only will these leadership roles benefit students, but they will also benefit faculty. A student-run center will take most of the responsibility off of faculty to reduce overall workload. It is essential for the BEAR PAW Center to have faculty support to ensure its success.

Interprofessionalism

The vision of the BEAR PAW Center is to create an interprofessional student-run center where students of different disciplines will collaborate to provide client-centered care. Throughout the OTD program, there are classes and discussions that allow students to collaborate with pharmacy, biomedical engineering, and applied behavior analysis students. The center can transition the learning experience from discussion to clinical practice. According to research, students participating in an interprofessional academic clinic show improved interprofessional attitudes and behaviors as well as increased interdisciplinary communication skills and understanding of roles and scope of practice of other disciplines (Petagno, 2018). Furthermore, Seif et al. (2014) states these experiences have led to students having an improved perception of their clinical reasoning skills when beginning their level II fieldwork placements.

Fieldwork

Fieldwork plays a crucial role in the development of future occupational therapists. The BEAR PAW Center could offer a unique opportunity to complete both level I and level II fieldwork experiences. The goal of level I fieldwork is to introduce students to the experience while increasing their comfort and understanding of client needs (American Occupational Therapy Association, n.d.). The Center will provide students with hands-on client-centered care where they will not only increase their understanding and comfort but their confidence and competence. In addition, this is an opportunity for Year I and Year II students to work collaboratively in support of furthering their clinical knowledge before entering Level II FW.

Research

The BEAR PAW Center will increase the opportunity for faculty and students to collaborate to complete research projects. Students will have opportunities to further increase their knowledge on the IRB process, research implementation, conference submission and presentation process, and the peer-reviewed journal submission process. Faculty will benefit from collaborative research with students by increasing their professional development and accomplishments. Faculty will also have the opportunity to complete independent research and/or research with their colleagues within the BEAR PAW Center.

As the center transitions to an interprofessional service the opportunity for interprofessional research increases for students and faculty. This provides more opportunities not only for students, but also faculty and staff to learn more about other professions' roles and scope of practice.

Telehealth

Telehealth continues to develop and offer accessible health care services including Occupational Therapy. The Accreditation Council for Occupational Therapy Education standards now require that telehealth is included within the curriculum (Serew et al., 2020). The BEAR PAW Center provides a unique opportunity for the Division of OT to include telehealth into the curriculum.

Outcomes

Outcomes are the product or a result of a program or service that can be measured through the collection of data (Community Development Unit [CDU], Government of Alberta [GOA], 2021). Outcomes of the BEAR PAW Center should be measured to determine the successes, challenges, and impact throughout each year. Outcome tracking and analysis is crucial for the growth and sustainability of the BEAR PAW Center .

The student Community Relations Coordinator will lead the tracking efforts for both client and center outcomes. The electronic health record (EHR) software that is contracted may include features to track some desired outcomes such as the number of visits/appointments, no shows, and cancellations. Any outcomes not included in the EHR software can be tracked manually using a Google Sheet.

Additional outcomes that can be measured include:

- Clients:
 - Number of clients (total, seen per day/week, discharged, completed goals)
 - Satisfaction on the quality of services received
- Students:
 - Number of students working in the center
 - Student satisfaction with the center
- Fundraisers:
 - Money raised
 - Number of attendees or donors
 - Number of new donors or connections

See Fundraising section for more information
- Donations:
 - Monetary donations vs. donations of goods or products
 - Crowdfunding (money raised, number of donors)
 - Number of clients able to make a suggested (but not mandatory) donation for services
 - Number of donors
 - Retention rate of donors
- Referrals:
 - Number of clients referred by each provider or practice
 - Number of referrals received vs. number of completed evaluations from referrals

Future Programs & Ideas

Most future programs will need approval from the faculty board, Division of OT, and WNE administrators before implementation . Below you will find a list of recommendations for future programs.

Adaptive Gardening

A therapeutic adaptive gardening program should target the adult & aging population, however, should be open to all members in the surrounding community. This program will take place in the yard of the BEAR PAW Center and serve as a community outreach program, as well as an excellent therapeutic and social opportunity for the clients. The adaptive garden can be used for both group and one-to-one interventions.

Center of Human Development (CHD) & Adaptive Sports

The OTD program currently collaborates with the [CHD](#) to host and provide volunteers for different events. As a center our goal is to act as a support for the CHD. Therefore, consistent communication is required when developing new programs related to adaptive sports and other related events. The BEAR PAW Center and OTD students could provide unique new resources to the many programs CHD runs in the community. For the development and planning of future programs and events, students and hired staff will need to collaborate with the Program Manager for Disability Resources at Center for Human Development from CHD.

Domestic Violence Support Groups

Domestic violence support groups was another community need identified by the community resource survey. The BEAR PAW Center can offer domestic violence support groups in order for victims of domestic violence to have a safe place to seek comfort and peer support. Student practitioners can provide information regarding hotlines, shelters, and other resources. \

Donated Goods

To address the need for food assistance the BEAR PAW Center can partner with local grocery stores (Big Y, Stop & Shop, Price Rite) and food pantries. Partnerships with

grocery stores can potentially also lead to donated products (food, menstrual products, wet wipes, dry shampoo, etc.) that can be given to clientele . While partnerships with food pantries should be supportive and not competitive, the BEAR PAW Center would have a small pantry of donated foods and other personal items for clients to choose from. This can occur once per semester or more depending on the partnership and amount of donated goods. WNE & OTD students and faculty should be made aware that the BEAR PAW Center is always accepting donated goods. However, the student board should communicate with SOTA to avoid interfering with any plans or events they have occurring throughout the year. To improve the quality of the pantry a form could be available for clients to request essential items such as tampons, wet wipes, diapers, food, etc. This form could assist with the asking of donated goods from the WNE community along with grocery stores. It should be made aware to clients that the form does not guarantee items.

Driving Rehabilitation Program

For the driving rehabilitation program, a physician referral and relevant medical diagnosis will be required. In the driving rehabilitation program, students under the supervision of a license OT will provide driving evaluations and interventions through off-road training and use of a driving simulator.

Financial Assistance Programs

The community resource survey also reported the need for financial assistance programs for the Hampden County community. The financial assistance program should also require a sign-up form. This will determine how often financial assistance programs are needed per semester and/or if individual sessions would be more appropriate. Students can assist clients with budgeting, saving, and money management strategies. Again, the sign-up form should have a space for what type of assistance the client needs help with. This will determine how to run the program throughout the semester.

Health Insurance Assistance Programs

The Willow Clinic of UC Davis assists their clients to sign up for health insurance through the Cover California Initiative. In order to do this at the BEAR PAW Center, Massachusetts requirements will have to be reviewed to ensure students can learn how to sign-up clients. Once this is determined, students can assist clients who are interested in signing up for insurance. This will build trust and the therapeutic relationship between clients and student practitioners.

Housing & Employment Assistance Programs

Housing and employment are essential to an individual's quality of life. Housing assistance programs can address how to apply for housing assistance and access resources such as the internet. Students would work with clients to fill out application housing assistance or other forms that may be required. A form should be available for clients to fill out to state if they are interested in or not. This would determine how many times a semester this program would run.

Similar to the housing assistance program, the employment assistance program should have a sign-up form. Since the employment assistance programs could have many different areas that could be addressed. The sign-up form should have a space for what type of assistance the client needs help with (interviews, application process, workers comp, disability, unemployment, etc). Students could provide assistance in all different aspects of employee assistance. Requiring clients to identify what they need assistance with will allow the student board to determine how many students will be needed for the program as well as if one-to-one or groups would be more appropriate.

National Seating & Mobility Clinics

[National Seating & Mobility](#) has expressed interest in collaborating with the BEAR PAW Center in the future to develop a program for our community. During this program, students can assist in the fitting, ordering, and maintenance of various mobility devices. Further discussions with Richard (Richie) Samay from National Seating and Mobility will have to occur for the planning and development of this program.

Mental Health Groups

The community resource survey indicated a need for additional mental health services for all ages. Student practitioners can develop a variety of mental health groups for clients at the BEAR PAW Center. These groups may include coping strategies, CBT, DBT, ACT, relapse prevention and recovery strategies, educational discussions, and/or sensory-based activities to promote occupational engagement. Another option is to host mental health support (i.e. Alcohol Anonymous, Narcotic Anonymous) groups for clients to receive support and comfort from peers.

Obstructive Sleep Apnea Education

Based on an extensive review of the literature, approximately 25 million Americans are affected by Obstructive Sleep Apnea (OSA) (Aloia et al., 2004; American Sleep Apnea Association, 2020; Shapiro & Shapiro, 2010). OSA is a sleep disorder defined as a partial or complete blockage of the upper airway, that results in decreased movement of oxygen to the lungs, reducing oxygen saturation levels, and resulting in multiple arousals during sleep (American Sleep Apnea Association, 2020; Nadeem et al., 2013; Sawyer et al., 2011). The first-line treatment for OSA is Continuous Positive Airway Pressure (CPAP), however, only 30-60% of CPAP users adhere to recommended therapy (Patil et al., 2019). Comen et al. (2016), states individuals with OSA should be treated in multimodal and holistic ways extending beyond medical treatment, including physiological, emotion, and social components (Lyda, 2022). Student practitioners at the BEAR PAW Center can utilize resources created by Haley E. Lyda, OT/s for a 5-week self-management & health literacy program relating to OSA in order to educate clients with OSA in the future. This program was originally designed to educate individuals with OSA about their condition, effective interventions for enhanced sleep, and adherence to CPAP therapy. For PowerPoints and resources used, see the shared BEAR PAW Center folder. For questions or concerns please contact Haley E. Lyda at haley.lyda25@gmail.com.

Pelvic Health Therapy

This program may be more difficult to implement due to needing a certified pelvic floor OT but again will provide OTD students with new experiences they may not receive otherwise. Pelvic Health Therapy can address many aspects of an individual's life such as, but limited to, toileting, sleep, and sexual activity. For additional resources please see below:

- [The Functional Pelvis](#)

- Courses cost money, however, the instructor (an OT) provides blog posts and may be willing to collaborate with the BEAR PAW Center to provide an introductory course.
- [OTs for Pelvic Health Facebook page](#)
 - Offers empower hours every Wednesday at 12

Sex & Intimacy Program

The BEAR PAW Center offers a great setting for OTD students as well as licensed OTs to begin getting comfortable and confident addressing sex and intimacy. As OT's we have an obligation to our clients to address sexual activity as it's an ADL. Sex and intimacy often go hand in hand so its important to ensure group topics address both. Student practitioners can offer many different interventions that address sex such as positioning, sensory play, and adaptive equipment. For additional resources please see below:

- [Institute for Sex, Intimacy & Occupational Therapy](#)
- [Top 3 Tips for Talking about Sex & Intamcy with Clients](#)
- [Educational Presentation for Addressing Sex in Rehab](#)
 - Please contact Danielle at danielle.whitman07@gmail.com with any questions.
- [Pleasure ABLE: Sexual device manual for persons with disabilities](#)

Stress Reduction Groups

Stress and anxiety is an ongoing problem at WNE, as identified in a recent survey. According to the survey, 95.1% of students experience school-related stress and anxiety. (Fitzhugh, Joy, & Adams, 2020). In addition, 82.6% reported a decrease in academic performance and 85.2% report it affecting their personal relationships (Fitzhugh, Joy, & Adams, 2020). The Center for Health & Wellness (counseling division) has expressed interest in collaborating with the BEAR PAW Center. With the WNE Counseling Services, the BEAR PAW Center could provide groups aiming to help students identify coping strategies, stress management techniques, and other unique, occupation-based interventions to help reduce stress and anxiety. Offering stress reduction groups is one way the BEAR PAW Center can give back to the WNE community. For an example of a stress reduction program, please see the [mind map outline](#) or [program evaluation](#) of the stress and anxiety management program, *Hot Off The Stress!*, created by Dr. Adams' 2021 DEx group. If this is used in the future, please

contact the original authors, listed on the program evaluation, for credit and/or additional questions and concerns.

Students as Medical Advocates

Currently, there are no regulations or certifications to be a medical advocate. However, this should be checked regularly to ensure the BEAR PAW Center is compliant with state law and regulations. According to the community resource survey, there is a need for medical advocates, especially for the elderly population. Clients and caregivers can sign-up and/or ask the BEAR PAW Center to provide a medical advocate for doctor appointments. Student practitioners would attend appointments with clients and assist in the understanding of medical terminology while also advocating for the clients needs. This type of program will build trust between the BEAR PAW Center and the surrounding community.

Translation Services

Hampden County, MA is a diversely populated community consisting of a wide variety of individuals and families who speak different languages. While the majority of residents speak English (74.29%), the remainder of residents (25.71%) speak other languages, with Spanish (17.68%) leading this category as the second most spoken language. As the ninth largest and most diverse county in Massachusetts, there is an imperative need for a variety of multilingual resources in order to better serve all community members (World Population Review, n.d.). Multilingual resources will encourage clients to take a more active role in their care and decrease the language barriers impacting the therapeutic relationship.

Please see below for a list of ideas to address this and to ensure that the BEAR PAW Center is providing accessible services:

- Have all documents available in Spanish. As other commonly seen languages emerge, a copy of documents in the additional language may be provided.
- Coalition of Occupational Therapy Advocates for Diversity (COTAD) has a variety of [assessments and handouts in Spanish](#) on their website with a selection of apps that can be used when working with Spanish speaking clients.
- The Occupational Therapy Toolkit has a handful of [sample Spanish handouts](#) available.

- When translating documents, refer to the Arts and Humanities Department or Latin American Studies Department for a collaboration or consultation on translation. For a direct link to the department, please click below:
 - Latin American Studies: [Latin American Studies | Minor | Western New England University \(wne.edu\)](#)
 - Arts and Humanities Department: [Arts & Humanities Department | Western New England University \(wne.edu\)](#)
 - Current faculty within this department: [Arts & Humanities Faculty | Western New England University \(wne.edu\)](#)
 - Utilize handheld technology to communicate information in the center via phone or video
- Connect with local organizations or churches that are primarily Spanish-speaking that may be willing to help in the center with translation services:
 - Spanish Christian Church: 565 Chestnut St, Springfield, (413) 734-5707
 - Bilingual Veterans Outreach Center of Mass: 281 Franklin St, Springfield, (413) 731-0194
 - Holyoke Spanish SDA Church: 136-140 Suffolk St, Holyoke, (877) 518-0819
 - Spanish American Merchants Association: 86 Park St, Hartford, (860) 278-5825

As an additional idea and future goal of the BEAR PAW Center, we hope to attain an official contract with an interpreter service. Please see a chart below of a few explored services for future exploration.

Key Terms for chart:

VRI: Video Remote Interpretation

OPI: Telephone Interpretation

RSI: Remote Simultaneous Interpretation

Translation Software			
<i>Name</i>	<i>Contact Info</i>	<i>Brief Overview</i>	<i>Additional Notes</i>
Alta	404-224-9470	-Offers in- person, VRI, OPI, conference	-Provides to businesses, hospitals,

		interpretation, or RSI	government agencies, law firms, nonprofit organizations etc. (i.e. Walmart, Delta, BB&T, American Express) -Gives free quotes
CyraCom	617-643-3344	-Interpreter services via service dial -You will need to open an account and so that when you dial that number, you will use a pin# to activate the language you need.	MGH uses this service
iTi	800-648-0686	-Provides in-person, VRI, OPI, conference interpretation, and ASL	-Used by Hartford HealthCare (HHC), MassMutual, Department of Homeland Security etc. -Provides ASL as well -Can request a quote

Additional things to consider when exploring translation/interpretation services:

- Cost
 - This can potentially be covered through grants or by the school. If it is proposed the right way, the school might be interested in translation

software for the university as a whole if it is an identified need on campus (i.e. identifying a need through counseling, admissions, health services, etc.)

- Consider the deaf and/or hearing impaired individuals/community and software that addresses this as well

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**BEAR PAW CENTER
DIVISION OF OCCUPATIONAL THERAPY
WESTERN NEW ENGLAND UNIVERSITY
Mandatory Cultural Competency Requirement Form**

AOTA Diversity, Equity, and Inclusion (DEI) Toolkit:

❖ Module 1: Diversity, equity, & Inclusion:

- watched video
 - Completed ☐ Yes ☐ No

❖ Module 2: Addressing Unconscious Bias

- Watched Video
- Implicit Bias Test
- Unconscious Bias Group Activity Discussion
 - Completed ☐ Yes ☐ No

❖ Module 3: Uncovering Microaggressions Part 1

- Watched Video
- Course and Group Assessment
- Recognizing microaggressions and the Messages they Send
 - Completed ☐ Yes ☐ No

❖ Module 4: Facing Difficult Conversations Part 2

- Watched Video
- Speak Up: Responding to everyday bigotry, pages 19-55
- Prepared Statements When Responding to Microaggressions and Bias
 - Completed ☐ Yes ☐ No

❖ Module 5: Advocacy 101:

- Watched Video
 - Completed ☐ Yes ☐ No

❖ Read *A Framework for Addressing Diversity, Equity, and Inclusion in Everyday Practice for Occupational Therapy*

- Completed ☐ Yes ☐ No

Student Signature: _____

Date: _____

Faculty Supervisor Signature: _____

Date: _____

Bear Paw Center Student Coordinator : _____

Date: _____



**BEAR PAW CENTER
DIVISION OF OCCUPATIONAL THERAPY
WESTERN NEW ENGLAND UNIVERSITY
Mandatory Cultural Competency Requirement Form**

COTAD Requirements

- ❖ I agree to attend at least three COTAD events to satisfy the Bear Paw Center's Cultural Sensitive & Competent Care requirements for All students Occupational Therapist
 - Print name: _____
 - Signature: _____

Additional Suggested Resources for Review Only :

- ❖ Cleveland Clinic Diversity Toolkit:
 - Read *Understanding Culture* (pg. 207-208)
 - Read *Communication* (pg. 209-211)
 - *Suggested:* This toolkit also includes a Patient Care Guide (starting at pg. 5) that addresses considerations when providing care to individuals of varying cultures, races, ethnicities, religions, and sexual orientations.
- ❖ Coalition of Occupational Therapy Advocates for Diversity (COTAD)'s Resources on Anti-Racism (PDF of these resources can be found here) and LGBTQIA+ Resources
- ❖ University of North Dakota Occupational Therapy program's OT Cultural Competency: A Resources Guide and Cultural Competency Tool Kit

Student Signature: _____

Date: _____

Faculty Supervisor Signature: _____

Date: _____

Bear Paw Center Student Coordinator : _____

Date: _____



**BEAR PAW CENTER
DIVISION OF OCCUPATIONAL THERAPY
WESTERN NEW ENGLAND UNIVERSITY
Mandatory Cultural Competency Requirement Form**

Student Signature: _____

Date: _____

Faculty Supervisor Signature: _____

Date: _____

Bear Paw Center Student Coordinator : _____

Date: _____

Year I Competency Checklist

Student Name: _____

Semester: _____

<i>Level I Fieldwork students must complete the following requirements prior to completion at the BEAR PAW Center</i>						
Objective		#	Complete	Incomplete	Date of Completion	Faculty Initials
1.	Observe an Initial Evaluation performed by a Year II student	1				
2.	Administer Standardized Assessment	2				
3.	Administer Unstandardized Assessment	2				
4.	Complete Initial Evaluation	1				
5.	Administer Modality (TENs, ultrasound, paraffin, cupping, etc.)	1				
6.	Complete Discharge Planning	1				
7.	Plan & Perform an Individualized Occupation-based 30-minute Intervention	2				
8.	Assist in Educational Volunteer Recruitment	2				
9.	Perform Adaptive Equipment Training & Education	1				
10.	Perform Wheelchair Measurements	1				

Year I Competency Checklist

Students must complete 10 hours at the BEAR PAW Center by the end of the Semester
Submit to _____ by 12/__/2022

Date	Time	# of Hours

Total Number of Hours for the Semester: _____

Year II Competency Checklist

Student Name: _____

Semester: _____

<p><i>Level I fieldwork students must complete the following requirements prior to completion at the BEAR PAW Center</i></p>						
Objective		#	Complete	Incomplete	Date of Completion	Faculty Initials
1.	Perform Initial Evaluation	2				
2.	Administer Standardized Assessment	2				
3.	Administer Unstandardized Assessment	2				
5.	Administer Modality (TENs, ultrasound, paraffin, cupping, etc.)	2				
6.	Complete Discharge Planning	2				
7.	Plan & Perform an Individualized Occupation-based 30-minute Intervention	2				
8.	Assist in Educational Volunteer Recruitment	2				
9.	Perform Adaptive Equipment Training & Education	1				
10.	Perform Wheelchair Measurements	1				
11.	Perform Point of Service Documentation	1				
12.	Create Condition-specific HEP	1				
13.	Perform Caregiver or Family Member Education	1				
14.	Advocate the Role of OT to a Client or Member of the Community	2				
15.	Perform Home & Safety Evaluation	1				

Year II Competency Checklist

<i>Students must complete 10 hours at the BEAR PAW Center by the end of the Semester</i> <i>Submit to _____ by 12/___/2022</i>		
Date	Time	# of Hours

Total Number of Hours for the Semester: _____



Timeframe (days/times, etc. TBD) – by appointment only

WNE BEAR PAW Center

Occupational Therapy Referral Form

Department of Occupational Therapy
2nd Floor - Blake Law Center
Western New England University

Scheduling Phone Number: TBD
Scheduling Fax Number: TBD
Referral/communication email: TBD

Client Name: _____ Date: _____ Date of Birth: _____

Client Phone (to be used to schedule): _____

Preferred language: _____ Client email: _____

Primary Reason for Referral : _____

Level of Urgency: low ☐ medium ☐ high ☐

Circle the appropriate prescription:

- ☐ OT Evaluation and Treatment for _____
- ☐ Other: _____

Precautions or contraindications specific to occupational therapy (i.e. pacemaker, insulin dependent, fall risk) or **relevant medical history** or **other helpful information** (i.e. history of joint replacement, mental health considerations)?

Referring Clinic: _____ Clinic Phone: _____

Referring Provider Name: _____

Signature: _____ Date: _____

Would you like a copy of the OT notes to be sent to you? (Yes / No)

Send report to: _____

Secure email: _____



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WESTERN NEW ENGLAND UNIVERSITY**

Demographic Information

Date: _____ Client Name: _____

Date of Birth: _____ Pronouns: _____ Gender Identity: _____

City/State: _____

Language (Primary): _____ Language (Secondary): _____

Which racial and ethnic groups do you identify with? (Mark all that apply)

- ☐ American Indian or Alaska Native ☐ Asian ☐ Black or African American
☐ Caucasian or European Origin ☐ Hispanic, Latino or Spanish Origin
☐ Middle Eastern or North African ☐ Native Hawaiian or Other Pacific Islander
☐ Another race or ethnicity not listed above _____
☐ I prefer not to answer

Please print your specific ethnicities in the space below. Examples of ethnicities include Midwesterner (American), Mexican American, Korean, Jamaican, German, etc. Note, you may report more than one group.

Ethnicity(s) _____

***Student OT Please Refer to the Bear Paw Center Culture Competency Form (page 3) for Specific Patient Care Recommendations**

What is the highest level of education you have completed?

- ☐ Did not finish high school
☐ Graduated high school
☐ Attended college but did not complete a degree
☐ Completed an Associates Degree
☐ Completed a Bachelor's Degree
☐ Completed a Master's Degree
☐ Completed a Doctoral or Professional Degree (such as Medical or Law Degree)
☐ I prefer not to answer

Client Name: _____

DOB: ____/____/____



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How would you describe your family?

- ☐ Low income
☐ Lower-Middle income
☐ Middle income
☐ Upper-Middle income
☐ High Income
☐ I prefer not to answer

Primary Care Provider: _____

How did you hear about us? _____

Reason for Visit : _____

Contact Information

Home Phone: _____ Cell Phone: _____

Email: _____

Medical History

Do you have a specific diagnosis you would like to receive services for? Yes No

Please state: _____

Please list previous and/or current medical conditions:

How do you describe your ability status? (Mark all that apply)

- ☐ A sensory impairment (i.e., vision, hearing, touch) ☐ A mobility impairment
☐ A learning impairment (ADHD, dyslexia) ☐ A mental health condition
☐ A long term condition (diabetes, parkinson's, arthritis)
☐ A temporary condition due to illness of injury (brain injury, broken bone, stroke)
☐ A ability not listed above _____
☐ I prefer not to answer

Client Name: _____

DOB: ____/____/____



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WESTERN NEW ENGLAND UNIVERSITY**

Please print your specific ability status in the space below. Examples of statuses include: Anxiety, Auditory processing condition, Low vision, Hemiparesis, Left side Neglect, Use of a mobility aid (cane, walker, wheelchair), etc. Note you may report more than one.

Ability Status(es) _____

Please list any allergies(*medication, food, environmental, products, etc.*) **you have below:**

Allergy	Reaction

Please list current medications and dosage (*include non-prescription, vitamins, and supplements*):

Medication	Dose (<i>strength and # per day</i>)

Please circle “Yes” or “No” to the following questions:

Do you have a pacemaker?

Yes

No

Client Name: _____

DOB: ____/____/____



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WESTERN NEW ENGLAND UNIVERSITY**

Are you pregnant? Yes No

Do you have a seizure disorder? Yes No

Do you smoke? Yes No

If yes, how often? _____

Type: Cigars Cigarettes Vape with Nicotine Vape without Nicotine Cannabis

Do you use smokeless tobacco? Yes No

Do you drink alcohol? Yes No

If yes, how often? _____

Type: Beer Wine Liquor Combination

Do you use drugs recreationally? Yes No

Did you receive the Flu Vaccine? Yes No

Did you receive the COVID Vaccine? Yes No

Surgeries & Hospitalizations

Please list any surgical history:

Have you been hospitalized for non-surgical reasons? Yes No

If yes, please specify: _____

Occupational Therapy History

Have you received Occupational Therapy before? Yes No

Client Name: _____

DOB: ____/____/____



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DIVISION OF OCCUPATIONAL THERAPY
WESTERN NEW ENGLAND UNIVERSITY**

Where? _____ When? _____

For what reason(s): _____

Reason for discharge: _____

Emergency Contact Information

Name: _____

Relationship to client: _____

Phone number: _____

Transportation

Please describe your means of transportation to the center. (Mark all that apply)

- ☐ I will drive to/from the center
- ☐ A family member or caregiver is willing to drop off and pick me up from the center
- ☐ I will use public transportation to/from the center
- ☐ I will use medically assisted transportation to/from the center
- ☐ I have no transportation to/from the center.

If you would like the Bear Paw Center to provide you with resources for transportation please circle yes or no below.

☐ Yes ☐ No

If transportation is not available are you willing to receive Bear Paw Center services through electronic platforms (Computer, Laptop, Cellphone, Tablet). Please circle yes or no below.

☐ Yes ☐ No

Client Name: _____

DOB: ____/____/____



**BEARPAW CENTER
DIVISIÓN DE TERAPIA OCUPACIONAL
UNIVERSIDAD DEL OESTE DE NUEVA INGLATERRA**

Información demográfica

Fecha: _____ Nombre del cliente: _____

Fecha de nacimiento: _____ Pronombres: _____ Identidad de género: _____

Ciudad/Estado: _____

Idioma (principal): _____ Idioma (secundario): _____

¿Con qué grupos raciales y étnicos se identifica? (Marque todo lo que corresponda)

- ☐ Indio americano o nativo de Alaska ☐ Asiático ☐ Negro o afroamericano
☐ Caucásico o de origen europeo ☐ Hispano, latino o de origen español
☐ Medio Oriente o África del Norte ☐ Nativo de Hawai u otro Pacífico Isleño
☐ Otra raza o etnia no mencionada anteriormente _____
☐ Prefiero no contestar

Por favor escriba sus etnias específicas en el espacio a continuación. Los ejemplos de etnias incluyen Medio Oeste (estadounidense), mexicano-estadounidense, coreano, jamaquino, alemán, etc. Tenga en cuenta que puede reportar más de un grupo.

Etnicidad(es) _____

***Estudiante OT Consulte el Formulario de competencia cultural del Bear Paw Center (página 3) para obtener recomendaciones específicas para el cuidado del paciente**

¿Cuál es el nivel más alto de educación que ha completado?

Nombre del cliente: _____
nacimiento: ____/____/____



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- ☐ No terminó la escuela secundaria
- ☐ Se graduó de la escuela secundaria
- ☐ Asistió a la universidad pero no completó un título
- ☐ Completó un título de asociado
- ☐ Completó una licenciatura
- ☐ Completó una maestría
- ☐ Completó un doctorado o título profesional (como como Licenciado en Medicina o Derecho)
- ☐ Prefiero no contestar

¿Cómo describiría a su familia?

- ☐ Ingreso bajo
- ☐ Ingreso medio-bajo
- ☐ Ingreso medio-alto
- ☐ Ingreso alto
- ☐ Prefiero no contestar

Proveedor de atención primaria:

¿Cómo se enteró de nosotros? _____

Motivo de la

visita: _____

Contacto Información

Teléfono de casa: _____ Teléfono
celular: _____

Correo
electrónico: _____

Nombre del cliente: _____
nacimiento: ____/____/____



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Historial médico

¿Tiene un diagnóstico específico para el que le gustaría recibir servicios? ☐ Sí ☐ No

Indique: _____

Indique las condiciones médicas anteriores y/o actuales:

¿Cómo describe su estado de capacidad? (Marque todo lo que corresponda)

- ☐ Un impedimento sensorial (es decir, visión, oído, tacto) ☐ Un impedimento de movilidad
- ☐ Un impedimento de aprendizaje (ADHD, dislexia) ☐ Una condición de salud mental
- ☐ Una condición a largo plazo (diabetes, parkinson, artritis)
- ☐ Una afección temporal debido a una enfermedad o lesión (lesión cerebral, fractura de hueso, accidente cerebrovascular)
- ☐ Una habilidad que no se menciona arriba _____
- ☐ Prefiero no responder

Escriba el estado de su habilidad específica en el espacio a continuación.

Ejemplos de estados incluyen: Ansiedad, Condición de procesamiento auditivo, Baja visión, Hemiparesia, Negligencia del lado izquierdo, Uso de una ayuda para la movilidad (bastón, andador, silla de ruedas), etc. Tenga en cuenta que puede informar más de uno.

Estado(s) de capacidad _____

Enumere las alergias (medicamentos, alimentos, ambientales, productos, etc.) que tenga a continuación:

alérgica	Reacción

Nombre del cliente: _____

nacimiento: ____/____/____



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Enumere los medicamentos actuales y la dosis (*incluya medicamentos sin receta, vitaminas y suplementos*):

Medicamento	Dosis (fuerza y # por día)

Encierre en un círculo "Sí" o "No" a las siguientes preguntas:

¿Tiene un marcapasos?	Sí	No
¿Está embarazada?	Sí	No
¿Tiene un trastorno convulsivo?	Si	No
¿Fuma?	Sí	No

En caso afirmativo, ¿con qué frecuencia? _____

Tipo: Cigarros Cigarrillos Vape con nicotina Vape sin nicotina Cannabis

¿Utiliza tabaco sin humo?	Si	No
¿Bebes alcohol?	Sí	No

Nombre del cliente: _____
nacimiento: ____/____/____



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En caso afirmativo, ¿con qué frecuencia? _____

Tipo: Cerveza Vino Licor Combinación

¿Utiliza drogas recreativamente? Sí No

¿Recibió la vacuna contra la gripe? Sí No

¿Recibió la vacuna COVID? Sí No

Cirugías y hospitalizaciones

Indique cualquier antecedente quirúrgico:

¿Ha sido hospitalizado por motivos no quirúrgicos? Sí No

En caso afirmativo, especifique:

Historial de terapia ocupacional

¿Ha recibido terapia ocupacional anteriormente? Sí No

¿Dónde? _____

¿Cuándo? _____

Por qué motivo(s): _____

Motivo del alta: _____

Información de contacto de emergencia

Nombre del cliente: _____

nacimiento: ____/____/____



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Nombre:

Relación con el cliente:

Número de teléfono:

Transporte

Describa su medio de transporte al centro. (Marque todo lo que corresponda)

- ☐ Manejaré hacia/desde el centro
- ☐ Un familiar o cuidador está dispuesto a dejarme y recogerme del centro
- ☐ Usaré el transporte público hacia/desde el centro
- ☐ Yo utilizaré transporte asistido médicamente hacia/desde el centro
- ☐ No tengo transporte hacia/desde el centro.

Si desea que Bear Paw Center le brinde recursos para el transporte, encierre en un círculo sí o no a continuación.

☐ Sí ☐ No

Si no hay transporte disponible, ¿está dispuesto a recibir los servicios de Bear Paw Center a través de plataformas electrónicas (computadora, laptop, celular, tableta). Encierre en un círculo sí o no a continuación.

☐ Sí ☐ No

Nombre del cliente: _____

nacimiento: ____/____/____

Initial Evaluation and Treatment Plan

OT Student: _____

Participant's Initials: _____

Date of Evaluation: _____

Occupational Profile	
Areas of Focus: <i>Name, DOB, gender, hobbies, interest, work history, education, occupational history (life experiences)</i>	
Medical/ Therapy History	
Areas of focus: <i>Medical precautions</i> <i>Pain assessment (pain at rest, pain with movement, limitations, management)</i> <i>Fall risk</i> <i>Vision</i> <i>Hearing</i>	
Prior Level of Functioning	
Areas of Focus: <i>Household management, health management, self-care, productivity (work, education, volunteer)</i>	
Performance Patterns, Context, and Environment	
Areas of Focus: <i>Roles, routines, schedule, physical (home/work set-up/environment), Social (family, supports, friends), Cultural (values, family, organizations)</i>	
Client Factors	
Areas of focus: <i>Range of motion, cognition, sensory, posture, fine and gross motor</i>	
Functional Assessment/ Skilled Observations	

<i>Areas of focus:</i> <i>Feeding, bathing, hygiene and grooming,</i> <i>toileting, UB/LB dressing, housekeeping,</i> <i>community, functional mobility, bed mobility,</i> <i>managing medications, managing finances,</i> <i>meal preparation</i>	
Client Goals	
<i>Area of focus:</i> <i>Clients priorities and desired outcomes</i>	
Objective	
<i>Area of focus:</i> <i>Evaluation Methods (skilled, observation,</i> <i>formal standardized assessment)</i>	
Assessment	
<i>Area of focus:</i> <i>Evaluation Interpretation and Results</i>	
Plan	
<i>Area of Focus:</i> <i>Goals, therapy frequency/duration, and</i> <i>rationale for educational services</i>	

Weekly Intervention Plan

OT Student: _____

Participant's Initials: _____

Date to be implemented: _____

Occupational Profile:

Goal	
Frame of Reference/ Model	
Area of Occupation	
Intervention	
Progression upgrade/downgrade	
Rationale	

OT Student: _____

Participant's Initials: _____

Date of Evaluation: _____

Date of Discharge Summary: _____

Occupational Profile	
<i>-Primary Reason for Referral -Brief Occupational History -Areas of Concern</i>	
Objective	
<i>-Occurrence of re-evaluation -PLOF vs CLOF</i>	
Assessment	
<i>-State current goals -Progress made towards goals -Indicate if goals were met or not</i>	
Plan/Recommendations	
<i>-State plan & recommendation for d/c</i>	

Review the discharge summary with your client & provide your signature when completed:

OT Student: _____

Date: _____

Discharge Satisfaction Survey

- (1) I am satisfied with the services I received.
 - (a) Undecided
 - (b) Strongly disagree
 - (c) Disagree
 - (d) Agree
 - (e) Strongly Agree
- (2) I feel I have made progress since starting.
 - (a) Undecided
 - (b) Strongly disagree
 - (c) Disagree
 - (d) Agree
 - (e) Strongly Agree
- (3) I would refer someone to the center.
 - (a) Undecided
 - (b) Strongly disagree
 - (c) Disagree
 - (d) Agree
 - (e) Strongly Agree
- (4) I would return to the center if needed.
 - (a) Undecided
 - (b) Strongly disagree
 - (c) Disagree
 - (d) Agree
 - (e) Strongly Agree
- (5) My OT/s was sensitive to my needs and made adjustments to my session accordingly.
 - (a) Undecided
 - (b) Strongly disagree
 - (c) Disagree
 - (d) Agree
 - (e) Strongly Agree
- (6) I had input into my treatment plan goals
 - (a) Undecided
 - (b) Strongly disagree
 - (c) Disagree
 - (d) Agree
 - (e) Strongly Agree
- (7) The information and education provided by the program addressed my needs and areas of concern
 - (a) Undecided
 - (b) Strongly disagree
 - (c) Disagree
 - (d) Agree

(e) Strongly Agree

(8) Please select the number on the scale to indicate your overall experience participating in this program. 5 means a very good experience; 0 means a very poor experience:

Comments and feedback: