



# Saskatchewan Society of Occupational Therapists

***Professional Portfolio***

***Of***

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# Saskatchewan Society of Occupational Therapists

*P.O. Box 9089 Saskatoon, SK S7K 7E7 Phone: (306) 956-7768 [www.ssot.sk.ca](http://www.ssot.sk.ca)*

Dear Member,

The Saskatchewan Society of Occupational Therapists (SSOT) is pleased to present you with your Professional Portfolio.

This Professional Portfolio will:

- Encourage and support your development of professional knowledge, skills, judgment and interpersonal attitudes.
- Assist you in identifying your learning needs.
- Track your professional learning activities and the benefits these activities have upon your practice.
- Assist you in organizing and storing the documents required for the SSOT Continuing Competency Program (CCP).
- Assist you in recording, organizing and storing documents or other materials that demonstrate your professional growth or achievements.

The Professional Portfolio is intended to be a dynamic tool that you will review and update on an ongoing basis. Suggestions for organizing materials and documents are provided. However, you are encouraged to determine the specific content of your portfolio.

The scope of your portfolio is likely larger than what the binder can physically accommodate. As such, you are encouraged to choose items that best substantiate that your practice is meeting the essential professional competencies and that you are continually improving your competence.

You are welcome to use your portfolio for purposes beyond the CCP. For example, your Professional Portfolio can be used to showcase your skills to employers, clients, or potential business partners.

Please be aware that the Self Assessment Tool (SAT) and the Professional Development Plan and Outcomes (PDPOs) are not protected from disciplinary or legal investigation.

We sincerely hope that you find that the Professional Portfolio benefits both you and your clients.

The Professional Portfolio is a new endeavour for SSOT and we are interested in making it as effective as possible. If you have questions or comments about the Professional Portfolio please contact the SSOT Member at Large for Professional Practice at [malpp@ssot.sk.ca](mailto:malpp@ssot.sk.ca).



# Saskatchewan Society of Occupational Therapists

## ***Professional Portfolio***

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# Saskatchewan Society of Occupational Therapists

## ***Section 1: Continuing Competency Program Description Policies & Procedures***

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As of February 2011, Practicing and Restricted license SSOT members are required to participate in the Continuing Competence Program (CCP) as part of the regular renewal process.

The purpose of the CCP is to substantiate that SSOT members are meeting essential professional competencies and engaging in professional development through the use of a formalized process.

### **Core Requirements of the CCP**

Practicing and Restricted license SSOT members must:

- i.) Complete the Self-Assessment Tool annually.
- ii.) Complete and submit Professional Development Plan and Outcomes (PDPOs) for previous year and upcoming year by February 15 annually.
  - o PDPOs must state at least two goals
- iii.) Retain and maintain the SSOT Professional Portfolio including PDPOs, and documentation of progress towards/completion of PDPOs.
  - o PDPOs must be retained for 10 years

### **Additional requirements of the CCP**

- o Possible participation in an audit of Professional Portfolio.
- o Participating in a mentoring process if necessary.

The CCP policy is included in your Professional Portfolio for reference.

Further information and CCP resources can be found on the “Continuing Competency Program section” of the SSOT website.

[http://ssot.sk.ca/continuing\\_competency\\_program](http://ssot.sk.ca/continuing_competency_program)



## **1 Policy**

- 1.1 Practicing and Restricted license SSOT members are required to participate in the Continuing Competence Program (CCP) as part of the regular renewal process.
- 1.2 Student, Life, Temporary (3 month), Non-Practicing SSOT members, and initial registrants are exempt from participating in the CCP.
- 1.3 The Professional Development Plan and Outcomes (PDPO) must be completed and received by SSOT by February 15<sup>th</sup> of each year. This includes your completed PDPO of the previous year along with your PDPO for the current year. PDPOs for the current year must state 2 goals and these goals must be updated annually to show progression.
- 1.4 Any SSOT member, that is renewing as a practicing or restricted license SSOT member, whose PDPO is not received by the 15<sup>th</sup> of February will be charged a late fee; if the PDPO has not been received by the last day of February, that member will be immediately notified, along with applicable employer(s), that the member in question is no longer registered with SSOT and, therefore, cannot practice Occupational Therapy in Saskatchewan as of March 1.
- 1.5 Members participating in the CCP are required to retain and maintain accurate records of learning activities related to professional development in a professional portfolio.
- 1.6 If a member's goal(s) becomes irrelevant or unattainable within the year and is thus omitted, the member is required to establish an alternate goal and provide evidence for same. It is insufficient to omit PDPO goals and/or evidence and not replace or modify them in their PDPO and Professional Portfolio.
- 1.7 If submitting evidence for a goal that has progressed from a previous year, ensure to send all evidence from beginning of goal to current so that progression can be determined.
- 1.8 In exceptional circumstances members may submit a request to SSOT council for an extension of submission dates or exemption of participation in the CCP according to SSOT policy G#17.
- 1.9 A minimum of 5% of members will be randomly chosen to be audited.
- 1.10 Audits shall be conducted by individuals who are eligible to be SSOT practicing members, without direct or indirect conflict of interest, and have



- attended an orientation to the CCP audit process.
- 1.11 Any member selected for audit, whose Professional Portfolio contents are not received by SSOT by October 1 will be charged a late fee. If the Professional Portfolio contents are not received prior to the first day of the audit then the Professional Practice Committee (PPC) will recommend to SSOT Council that this member did not meet audit standards.
  - 1.12 The PPC chair will report audit results and make recommendations to SSOT council for decision.
  - 1.13 The PPC chair will notify audited members of Council's decision regarding audit results.
  - 1.14 In circumstances where SSOT members do not meet audit criteria mentoring may be provided as a support mechanism.
  - 1.15 SSOT Members who do not meet audit criteria in the current year may be required to participate in the audit of the upcoming year.
  - 1.16 Members who have been audited have the right to appeal any decision(s) of the SSOT council according to the SSOT appeal policy.

## **2. Purpose**

- 2.1 To substantiate that SSOT members are meeting essential professional competencies and engaging in professional development through the use of a formalized process.

## **3. Procedure**

- 3.1 CCP Core Requirements
  - 3.1.1 CCP requires that selected members:
    - a) Complete the Self-Assessment Tool annually.
    - b) Complete and submit the PDPO to SSOT by February 15 annually.
      - PDPOs must state at least two goals.
      - Goals and/or strategies must be updated annually to show progression.
    - c) Retain and maintain a Professional Portfolio including PDPOs and evidence of progress towards/completion of PDPOs.
      - PDPOs must be retained by the SSOT member for 10 years
      - Examples of evidence/documentation of learning activities related to professional development may



include but is not limited to:

- Curriculum Vitae (CV) or Resume
- Diploma or Degree Certificate
- Additional education or training i.e.) AMPS certification, SIPT etc.
- Performance evaluations
- Certificates of courses, workshops, lectures or seminars attended or completed
- CAOT examination results
- University transcripts
- Reference letters
- Documentation of involvement in publications, workshops, conferences etc.
- List of in-services or courses taught
- Documentation of discussions had with peers, colleagues, or journal clubs as a method of learning
- Reviews of policies and procedures
- Involvement in development or revision of policies and procedures
- An audit of the member's skill or ability in a certain competency
- Survey results
- A grant or research proposal
- Documentation describing involvement program development
- Agendas and minutes of meetings attended
- Samples of documentation i.e.) reports, chart notes, practice guidelines or protocols developed
- Budgets or business plans
- Reference lists of relevant research articles along with summaries of insights gained from the materials
- A summary of the information and insights gained from in-services and rounds.
- Reflective Journal
- Feedback from clients, colleagues or supervisors
- Grants, scholarships or contracts awarded
- Awards or Certificates of Achievement
- Publications



### 3.2 Review of PDPOs

3.2.1 The Registrar will ensure that the PDPO is submitted annually with membership renewals.

3.2.2 The Registrar will ensure that the submitted PDPO state at least two goals and are complete.

3.3 The Registrar will adhere to the policy regarding late membership renewals for any late submission of a PDPO.

3.4 Requests for extension of submission dates or exemption of participation in the CCP can be submitted to SSOT Council. Outcomes of requests will be subject to the discretion of council.

### 3.5 Random Selection for Audit

3.5.1 The Registrar will ensure that a minimum of 5% of eligible members are randomly selected for audit and will notify the PPC chair of those members selected.

3.5.2 The random selection will be conducted by the Registrar using a method that has been approved by SSOT Council.

### 3.6 Audit Process

3.6.1 The Registrar will ensure that the names and addresses of the members who have been randomly selected to participate in the audit are forwarded to the PPC chair by August 15.

3.6.2 PPC chair will notify the selected members of their selection by September 1 by registered mail.

3.6.3 The selected member will be required to submit the relevant contents of his or her Professional Portfolio by October 1.

3.6.4 The selected member is responsible for any costs associated with sending the required documents to SSOT. SSOT is responsible for any costs associated with returning the documents to the selected member following the audit.

3.6.5 Upon receipt, the Administrative Assistant will forward the contents of the selected members Professional Portfolio to the PPC chair, and notify the selected member that their submission was received.

3.6.6. Selected members will be assigned an audit number and all





information submitted will be identified only using the number assigned to them.

3.6.7. Two auditors will be selected by the PPC to review each case.

Auditors must meet the following criteria:

- a) Be eligible to be an SSOT practicing member.
- b) Attend an orientation session on the CCP audit process including reviewing the Continuing Competency Foundational Document: Definitions, Purpose, Assumptions and Guiding Principle as well as current year's audit standards to ensure consistency.
- c) The SSOT Executive Director shall not be an auditor but may facilitate the audit process

3.6.8 The selected member will have the opportunity to declare any conflicts with the chosen auditors that may impede the fairness of the process. The selected member is to complete and send the conflict of interest form to the PPC chair by September 15.

3.6.9 The auditors chosen will also have the opportunity to declare any conflict of interest that may impede fairness. The auditor is to complete the conflict of interest form by September 15.

3.6.10 Each auditor will independently assess the documentation provided, using the established criteria to determine if there is adequate evidence of the selected member's effort of continued development, integration and application of knowledge and skills for his/her Occupational Therapy practice.

3.6.11 PDPOs must meet the following requirements:

- a) Must have at least two goals
- b) Goals must be related to Occupational Therapy Practice
- c) Goals must be based upon the Essential Competencies of Practice for Occupational Therapists in Canada 3<sup>rd</sup> Edition.
- d) Goals must be specific, measurable and have an anticipated completion date.

3.6.12 PDPOs must show reasonable progress towards completion of goals submitted the previous year. Goals do not necessarily need to be fully completed, but reasonable progress must be demonstrated.



3.6.13 If the auditor(s) find(s) that the provided documentation is incomplete, or so disorganized that it is difficult to assess, the portfolio will be returned to the selected member with instructions on what information or changes are required to allow the audit to continue.

3.6.14 The auditors' will aggregate their independent assessment results onto the CCP audit summary sheet.

3.6.15 If there are significant discrepancies or inconsistencies between the auditor assessments, and they are unable to arrive at an agreement regarding the audit results, then a third auditor will be appointed to independently audit the documents. The resulting majority opinion i.e.) meets audit standards or does not meet audit standards will be forwarded to the SSOT Council for decision.

3.6.16 The PPC Chair and Executive Director will review the CCP audit summary sheets submitted by the auditors, and the PPC Chair will make the following recommendations to SSOT Council for decision regarding the member's audit results:

- a) Take no further action i.e.) member has successfully met the audit requirements.
- b) Make recommendations to the selected member to improve their practice.
- c) Refer the selected member for mentoring to reach audit standards.
- d) Request the selected member be audited the following year.
- e) Other.

3.6.17 The PPC chair will provide the selected member with a report of SSOT Council's decisions regarding audit results, along with any actions deemed necessary. The report will be sent via registered mail.

3.6.18 The final audit report will be placed in the selected member's permanent SSOT file and will include:

- a) The independent assessments of each auditor
- b) The audit summary sheets
- c) Any additional comments from the auditors.

### 3.7 SSOT Mentoring Program

3.7.1 The process of Mentoring will include, but is not limited to:

- Helping to identify the selected member's strengths, performance, and challenges as they relate to the development



of their PDPO by using the Self-Assessment Tool.

- Assisting in planning strategies to bridge gaps in the learning process.
- Providing support, guidance and encouragement as the selected member develops their PDPO and compiles their evidence.
- Acting as a facilitator or mentor while the selected member takes the actions necessary to achieve his/her goals.
- Providing a written report to the PPC on the selected member's progress using the SSOT Restricted License Level II Process as a guide.

3.7.2 A list of mentors will be kept by SSOT who meet the following criteria:

- a) Be eligible to be an SSOT practicing member.
- b) Have attended or be available to attend an orientation session on the CCP.
- c) Signs the SSOT Mentoring Program Confidentiality document
- d) Be available to meet with the member being audited.
- e) Provide regular reports to PPC chair and a final report upon completion of involvement.
- f) Attend PPC meetings as required during the mentorship period.

3.7.3 The PPC will submit the names of individuals who do not meet audit standards to SSOT Council with a recommendation that these individuals participate in the SSOT Mentorship Program.

3.7.4 If SSOT Council approves that the member participate in the SSOT Mentorship Program the member will notified by registered mail from the PPC chair and will include the following information:

- Policy R#06
- A list of potential mentors for the individual to pick a first and second choice from
- Mentor report template
- SSOT Mentoring Program Confidentiality document
- Deadlines for selecting a mentor as well as the start and finish of the mentorship program

3.7.5 The PPC chair will contact the selected mentors to notify them that they were selected and who they will be mentoring as well as to set up an orientation session with them prior to the SSOT Mentorship Program starting.

3.7.6 An invitation by the PPC chair will be sent to the complete list of SSOT Mentors to attend the orientation session if they are



interested.

- 3.7.7 At the mentor orientation the following information will be reviewed:
- Policy R#06
  - Mentor report template
  - SSOT Mentoring Program Confidentiality document
  - How to write a SMART goal and what constitutes sufficient evidence for PDPOs
  - Deficiencies in their mentees PDPO goals and/or evidence submitted
  - Deadlines for the start and finish of the SSOT Mentorship program
  - Criteria for completion of the SSOT Mentorship Program
- 3.7.8 All relevant SSOT Mentorship Program letters, correspondence and reports will be kept on the individual's SSOT file.
- 3.7.9 Following submission of the rewritten PDPOs and/or submission of additional evidence the PPC chair or designate and another PPC member will review the materials submitted to determine if they meet audit standards.
- 3.7.10 If submitted material(s) do meet audit standards the PPC will make a recommendation to SSOT Council that SSOT Mentorship Program for the member is complete.
- 3.7.11 If the submitted material(s) do not meet audit standards the PPC will review the case and make a recommendation to SSOT Council on further action.
- 3.7.12 Following completion of the SSOT Mentorship Program mentees and mentors will be requested to send feedback on the program, process and communication with the PPC to the SSOT President.
- 3.7.13 Appeals will be dealt with according to SSOT Policy.



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## ***Section 2:***

### ***Personal and Professional Background***

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The following list indicates the type of documents that could be included in this section. Please note that there are no mandatory items.

- Curriculum Vitae (CV) or Resume
- Diploma or Degree Certificate
- Statements of beliefs, values or ethics
- Volunteer work
- Additional education or training i.e.) AMPS certification, SIPT etc.
- Fieldwork experience
- Copy of SSOT registration documents
- Performance evaluations
- Certificates of courses, workshops, lectures or seminars attended or completed
- Malpractice insurance documents
- CAOT examination results
- University transcripts
- Job description(s) current or previous
- Educational documents i.e.) reports, essays, presentations
- Achievements or awards
- Business cards or brochures
- List of Boards or Committee participation (Professional Associations, Councils)
- Reference letters
- Documentation of involvement in publications, workshops, conferences etc.
- List of in-services or courses taught
- List of grants received
- Other



# Saskatchewan Society of Occupational Therapists

## ***Section 3: Continuing Competency Program Documents***

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It is mandatory that this section includes your Professional Development Plan and Outcomes (PDPOs).

PDPOs must be retained for 10 years.

Please note that submission or retention of the Self Assessment Tool(s) (SAT(s)) is/are not mandatory but can be included if you choose.

Electronic and Microsoft Word versions of the SAT, PDP and PDPO are available for download on the “Continuing Competency Program” section of the SSOT website.

[http://ssot.sk.ca/continuing\\_competency\\_program](http://ssot.sk.ca/continuing_competency_program)

Please refer to the “Resources & Links” section of the SSOT website for additional resources such as:

- The Essential Competencies of Practice for Occupational Therapists in Canada
- The Occupational Therapists Act, 1997
- The Occupational Therapists Amendment Act, 2003
- SSOT Bylaws
- Saskatchewan Occupational Therapists Code of Ethics

[http://ssot.sk.ca/resources\\_and\\_links](http://ssot.sk.ca/resources_and_links)



# Saskatchewan Society of Occupational Therapists

## ***SSOT Self-Assessment Tool***

## Competency Unit 1: Assume Professional Responsibility

*Occupational therapists assume professional responsibility for safe, ethical and effective practice.*

<b>Item 1.1</b>	I meet Consistently	I need or want to improve	N/A	Please provide at least one example describing how this item of competency is achieved in your current area of practice. Attach additional pages if necessary.
<b>Demonstrate a commitment to clients, public and the profession.</b>				
Performance Indicators Are: <ul style="list-style-type: none"> <li>a. Demonstrate knowledge of regulation</li> <li>b. Demonstrate professional behaviours.</li> <li>c. Take action to ensure that practice and setting support professional responsibilities.</li> <li>d. Support others to practice professional responsibility</li> <li>e. Take necessary actions to ensure client safety.</li> </ul>				





Item 1.2	I meet Consistently	I need or want to improve	N/A	Please provide at least one example describing how this item of competency is achieved in your current area of practice. Attach additional pages if necessary.
<b>Practice within scope of professional and personal limitations and abilities.</b>				
<p>Performance Indicators Are:</p> <ul style="list-style-type: none"> <li>a. Demonstrate an understanding of the scope of practice as defined by the Saskatchewan Society of Occupational Therapists.</li> <li>b. Demonstrate an understanding of the interconnections between scope of practice and practice setting.</li> <li>c. Take action to ensure that personal and professional limitations do not cause competence to fall below a level considered acceptable by the Saskatchewan Society of Occupational Therapists.</li> <li>d. Manage overlaps in scope of practice with other professions.</li> </ul>				



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**Item 1.3**

**I adhere to the Code of Ethics**  
[SSOT Bylaw XVI Appendix 1](#)  
**for occupational therapists in**  
**Saskatchewan**

Performance Indicators Are:

- a. Communicate title and credentials accurately.
- b. Comply with client confidentiality and privacy practice standards and legal requirements.
- c. Respond appropriately to ethical issues encountered in practice.
- d. Maintain appropriate relationships and boundaries with clients.
- e. Manage conflict of interest

I meet Consistently	I need or want to improve	N/A	Please provide at least one example describing how this item of competency is achieved in your current area of practice. Attach additional pages if necessary.



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**Item 1.4****Apply ethical frameworks to solve ethical situations.**

Performance Indicators Are:

- a. Recognize situations which impact ethical behaviour.
- b. Respond appropriately to observed unprofessional behaviours in the practice.
- c. Comply with the obligation to and processes for reporting unsafe, unethical or incompetent practice by an occupational therapist.

I meet Consistently	I need or want to improve	N/A	Please provide at least one example describing how this item of competency is achieved in your current area of practice. Attach additional pages if necessary.



**Item 1.5**

**Demonstrate professional integrity.**

Performance Indicators Are:

- a. Accept responsibility for actions and decisions.
- b. Show respect for the dignity, privacy, and confidentiality of clients.
- c. Manage conflicts of interest (real or perceived).
- d. Demonstrate sensitivity to power imbalance (real or perceived).
- e. Understand the impact of values and beliefs that may affect practice.
- f. Demonstrate sensitivity to diversity.

I meet Consistently	I need or want to improve	N/A	Please provide at least one example describing how this item of competency is achieved in your current area of practice. Attach additional pages if necessary.



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## Competency Unit 2 – Think Critically

*Occupational therapists use critical reasoning and reflection approaches for safe, ethical, and effective practice.*

### Item 2.1

**Demonstrate sound professional judgement and clinical reasoning in decision-making.**

Performance Indicators Are:

- a. Demonstrate effective and evidence based problem solving and judgement to address client needs.
- b. Negotiate common ground with clients, inter-professional team members, and other stakeholders.
- c. Integrate complexity of client issues, needs, and goals within occupational therapy service.
- d. Integrate relevant information with previous learning, experience, professional knowledge, and current practice models.
- e. Synthesize and analyze the information to inform occupational therapy service.

I meet Consistently	I need or want to improve	N/A	Please provide at least one example describing how this item of competency is achieved in your current area of practice. Attach additional pages if necessary.



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Item 2.2	I meet Consistently	I need or want to improve	N/A	Please provide at least one example describing how this item of competency is achieved in your current area of practice. Attach additional pages if necessary.
<p><b>Engage in a reflective and evaluative approach to practice that integrates findings into practice.</b></p>				
<p>Performance Indicators Are:</p> <ul style="list-style-type: none"> <li>a. Demonstrate insight into personal expertise and limitations.</li> <li>b. Demonstrate effective, appropriate, and timely consultation with other health professionals as needed for optimal client service.</li> <li>c. Investigate alternative explanations for deficits in occupational performance and engagement.</li> <li>d. Recognize situations where services (i.e. client processes for occupation, occupational performance, and/or engagement) should be adjusted, limited, modified, or discontinued.</li> </ul>				



## Competency Unit III: Demonstrates Practice Knowledge

*Occupational therapists demonstrate practice knowledge for safe, ethical, and effective practice.*

### Item 3.1

**Use current occupational therapy foundational knowledge in day-to-day practice**

Performance Indicators Are:

- a. Apply relevant current knowledge of foundational biomedical and social sciences to practice.
- b. Use current models and approaches that apply in occupational therapy practice.
- c. Integrate appropriate current occupational therapy knowledge into practice.

I meet Consistently	I need or want to improve	N/A	Please provide at least one example describing how this item of competency is achieved in your current area of practice. Attach additional pages if necessary.



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**Item 3.2**

**Demonstrate awareness of the physical, social, cultural, institutional and economic environment relevant to the jurisdiction of practice.**

Performance Indicators Are:

- a. Understand the impact of physical, cultural, institutional, and economic factors relevant to practice.
- b. Adjust occupational therapy service to reflect a client-centred approach related to physical, social, cultural institutional and economic environment.

I meet Consistently	I need or want to improve	N/A	Please provide at least one example describing how this item of competency is achieved in your current area of practice. Attach additional pages if necessary.



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**Item 3.3**

**Demonstrate awareness of experiential knowledge of client and occupational therapist.**

Performance Indicators Are:

- a. Understand the impact of experiential knowledge of client and occupational therapist.
- b. Adjust occupational therapy services to reflect a client-centered approach related to the client's experiential knowledge as well as the occupational therapist's experiential knowledge.

I meet Consistently	I need or want to improve	N/A	Please provide at least one example describing how this item of competency is achieved in your current area of practice. Attach additional pages if necessary.



**Item 3.4****Demonstrate awareness of legislative and regulatory requirements relevant to the Saskatchewan Society of Occupational Therapists**

Performance Indicators Are:

- a. Understand the impact of legislative and regulatory requirements relevant to the province of Saskatchewan and area of practice.
- b. Ensure practice-setting policies are consistent with Saskatchewan regulations and legislative requirements.

I meet Consistently	I need or want to improve	N/A	Please provide at least one example describing how this item of competency is achieved in your current area of practice. Attach additional pages if necessary.



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## Competency Unit IV: Utilize an Occupational Therapy Practice Process to Enable Occupation

*Occupational therapists use systematic approaches to enabling occupation for safe, ethical, and effective practice*

### Item 4.1

**Clarify the role of occupation and enablement when initiating services.**

Performance Indicators Are:

- a. Identify the recipient(s) of occupational therapy service as the client(s).
- b. Clarify the expectations of stakeholders, third party payers, and relevant other that impact or complement service.
- c. Identify the knowledge, skills, and attitudes required to provide the appropriate service to the client.
- d. Communicate scope and parameters of services to clients, referring agents, and relevant others.
- e. Identify and communicate to client and relevant others the strengths and limitations of practice.
- f. Establish with the client a shared understanding of occupation, occupational performance, engagement, and enablement issues.

I meet Consistently	I need or want to improve	N/A	Please provide at least one example describing how this item of competency is achieved in your current area of practice. Attach additional pages if necessary.



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**Item 4.2**

**Demonstrate a systematic client centered approach to enabling occupation.**

- a. Use strategy that engages the client in a collaborative approach.
- b. Build rapport and trust within the relationship.
- c. Discuss client expectations with regard to occupational therapy services.
- d. Enable client to identify issues and clarify client concerns, expectations, and priorities.
- e. Enable client to examine risks and consequences of options.
- f. Achieve mutual understanding and agreement concerning services to be provided.

I meet Consistently	I need or want to improve	N/A	Please provide at least one example describing how this item of competency is achieved in your current area of practice. Attach additional pages if necessary.



**Item 4.3****Ensure informed consent prior to and throughout service provision.**

Performance Indicators Are:

- a. Adhere to regulatory, legislative, and service requirements regarding informed consent
- b. Demonstrate the principles and practices for obtaining informed consent.
- c. Obtain consent for involvement of support personnel, students, and other providers involved in the provision of occupational therapy service components.
- d. Identify situations where informed consent may be problematic and takes steps to rectify issues.

I meet Consistently	I need or want to improve	N/A	Please provide at least one example describing how this item of competency is achieved in your current area of practice. Attach additional pages if necessary.

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**Item 4.4**

**Access occupational performance, engagement, and enablement needs of client.**

I meet Consistently	I need or want to improve	N/A	Please provide at least one example describing how this item of competency is achieved in your current area of practice. Attach additional pages if necessary.

Performance Indicators Are:

- a. Assess occupational performance and engagement.
- b. Identify the client's strengths and resources.
- c. Assess components related to the occupation and occupational performance and engagement issues identified.
- d. Gather additional relevant information.
- e. Determine the appropriate service delivery approach for client-centered occupational therapy services



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**Item 4.5**

**Developing client-centred plan with client, interprofessional team members, and other stakeholders.**

I meet Consistently	I need or want to improve	N/A	Please provide at least one example describing how this item of competency is achieved in your current area of practice. Attach additional pages if necessary.

- Performance Indicators Are:
- a. Integrate client wants and needs into all aspects of planning.
  - b. Identify client's priority occupational issues and possible occupational goals.
  - c. Analyze physical, cultural, social, and institutional environmental impact on occupational performance and engagement issues.
  - d. Analyze and propose options to increase inclusion and accessibility in the client's environment.
  - e. Develop realistic, measurable, understandable, and targeted outcomes consistent with client's values and life goals.
  - f. Plan for needed service delivery, which considers limits or constraints on the various service delivery methods.
  - g. Refer to additional services as appropriate.

Empty space for providing examples of competency achievement.



**Item 4.6****Implement plan for occupational therapy services.**

Performance Indicators Are:

- a. Implement the client-specific plan with client, interprofessional team members and other stakeholders.
- b. Monitor impact of plans on person, occupation and, environment.
- c. Implement interventions in an effective and ethical manner.

I meet Consistently	I need or want to improve	N/A	Please provide at least one example describing how this item of competency is achieved in your current area of practice. Attach additional pages if necessary.





**Item 4.7**

**Monitor plan to modify in a timely and appropriate manner.**

Performance Indicators Are:

- a. Regularly re-assess client`s progress to compare with initial finds, occupational goals and plan.
- b. Adapt or redesign plan as needed.
- c. Document conclusion/exit and disseminates information and recommendations for next steps such as discharge, coordinated transfer, or re-entry.
- d. Discontinue service in situations when occupational therapy should not continue.

I meet Consistently	I need or want to improve	N/A	Please provide at least one example describing how this item of competency is achieved in your current area of practice. Attach additional pages if necessary.



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## Competency Unit V: Communicate & Collaborate Effectively

*Occupational therapists use effective communication and collaboration approaches for safe, ethical, and effective practice*

### Item 5.1

**Communicate effectively with the client, interprofessional team members, and other stakeholders using client-centred principles that address physical, social, cultural or other barriers to communicate.**

- a. Foster open, honest, and clear communication.
- b. Deliver information in a respectful, thoughtful manner.
- c. Use strategies that empower communication.
- d. Adapt communication approach to ensure that barriers to communication do not impact the client's ability to direct own care process.
- e. Employ education approach as appropriate.

I meet Consistently	I need or want to improve	N/A	Please provide at least one example describing how this item of competency is achieved in your current area of practice. Attach additional pages if necessary.



**Item 5.2**

**Communicate using a timely and effective approach.**

Performance Indicators Are:

- a. Use a systematic approach to record keeping of occupational therapy services.
- b. Maintain clear, accurate, and appropriate records to client encounters and plans.
- c. Apply the various regulations that are specific to record keeping in occupational therapy.
- d. Determine with client the right of others to client's information.
- e. Disclose information in accordance with client consent.

I meet Consistently	I need or want to improve	N/A	Please provide at least one example describing how this item of competency is achieved in your current area of practice. Attach additional pages if necessary.



**Item 5.3**

**Maintain confidentiality and security in the sharing, transmission, storage, and management of information.**

Performance Indicators Are:

- a. Adhere to legislation, regulatory requirements and facility/employer guidelines regarding protection of privacy, security of information.
- b. Establish and/or adhere to provincial and facility policies and procedures related to the management of information.
- c. Take action to anticipate and minimize foreseeable risks to privacy and confidentiality of information.

I meet Consistently	I need or want to improve	N/A	Please provide at least one example describing how this item of competency is achieved in your current area of practice. Attach additional pages if necessary.



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**Item 5.4****Collaborate with client, interprofessional team, and other stakeholders**

Performance Indicators Are:

- a. Explain role in client services to team members and clients.
- b. Demonstrate receptiveness to others' perspectives that serve the best interest of the client.
- c. Demonstrate flexibility within team.
- d. Ask for support when appropriate.
- e. Demonstrate leadership techniques appropriate to the situation.

I meet Consistently	I need or want to improve	N/A	Please provide at least one example describing how this item of competency is achieved in your current area of practice. Attach additional pages if necessary.



**Item 5.5**

**Work effectively with client, interprofessional team, and other stakeholders to manage positive professional relationships.**

I meet Consistently	I need or want to improve	N/A	Please provide at least one example describing how this item of competency is achieved in your current area of practice. Attach additional pages if necessary.

Performance Indicators Are:

- a. Demonstrate sensitivity to issues related to diversity and difference.
- b. Adapt approach to consider impact of diversity on occupational therapy service outcomes.
- c. Demonstrate willingness to set team goals and priorities, measure progress, and learn from experience together as a team.
- d. Enable parties to openly communicate and consider other opinions.
- e. Manage differences, misunderstandings, and limitations that may contribute to interprofessional tensions in an effective and diplomatic manner.



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## Competency Unit VI: Engage in Professional Development

*Occupational therapists engage in professional development for safe, ethical and effective practice.*

### Item 6.1

**Use self-evaluation, new learning, and evidence in professional development.**

Performance Indicators Are:

- a. Conduct a regular assessment of personal learning needs required to ensure ongoing competence.
- b. Adjust assessment of personal learning needs with external information.
- c. Review various sources of information and new knowledge and determines applicability to practice.

I meet Consistently	I need or want to improve	N/A	Please provide at least one example describing how this item of competency is achieved in your current area of practice. Attach additional pages if necessary.



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**Item 6.2****Demonstrate commitment to continuing competence.**

Performance Indicators Are:

- a. Maintain the knowledge, skills, and attitudes to provide safe, efficient, and effective service in areas of practice.
- b. Integrate new knowledge, skills, and attitudes into practice.
- c. Implement a plan for continual professional improvement.
- d. Take action to address deficiencies to enhance practice.

I meet Consistently	I need or want to improve	N/A	Please provide at least one example describing how this item of competency is achieved in your current area of practice. Attach additional pages if necessary.





**Item 6.3**

**Enhance personal competence through integration of on-going learning into practice.**

Performance Indicators Are:

- a. Keep abreast of changes in practice setting that affect scope of practice.
- b. Adapt to changes in practice using evidence, practice standards, and best practice.
- c. Enhance knowledge, skills and attitudes in needed areas of personal competence.

I meet Consistently	I need or want to improve	N/A	Please provide at least one example describing how this item of competency is achieved in your current area of practice. Attach additional pages if necessary.



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## Competency Unit VII: Manage Own Practice and Advocates within Systems

*Occupational therapists manage the quality of practice and advocate within systems for safe, ethical, and effective practice.*

### Item 7.1

#### Manage day-to-day practice processes.

Performance Indicators Are:

- a. Prioritize professional duties when faced with multiple clients and competing needs.
- b. Allocate occupational therapy services balancing client needs and available resources.
- c. Balance work priorities and manage time with respect to client services, practice requirements, and professional responsibilities.
- d. Manage professional responsibilities by recognizing personal and professional limits of functioning.

I meet Consistently	I need or want to improve	N/A	Please provide at least one example describing how this item of competency is achieved in your current area of practice. Attach additional pages if necessary.



**Item 7.2**

**Manage assignment of service to support personnel, other staff, students, and others under the occupational therapist's supervision.**

Performance Indicators Are:

- a. Adhere to regulatory requirements and/or guidelines relating to the assignment of tasks and supervision of support personnel, students of occupational therapy, and other students.
- b. Orient to role, duties, and responsibilities.
- c. Support effectiveness and safety through monitoring preceptorship, supervision, mentoring, teaching, and coaching.
- d. Assign appropriate work activities.
- e. Provide regular feedback and evaluation.

I meet Consistently	I need or want to improve	N/A	Please provide at least one example describing how this item of competency is achieved in your current area of practice. Attach additional pages if necessary.

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**Item 7.3**

**Contribute to a practice environment that supports client-centered occupational therapy service, which is safe, ethical and effective.**

Performance Indicators Are:

- a. Participate in established organizational processes.
- b. Manage risk in practice to prevent and mitigate safety issues.
- c. Take appropriate action to align consistency of practice environment requirements with regulatory requirements.

I meet Consistently	I need or want to improve	N/A	Please provide at least one example describing how this item of competency is achieved in your current area of practice. Attach additional pages if necessary.



**Item 7.4****Demonstrate commitment for client and provider safety.**

Performance Indicators Are:

- a. Demonstrate knowledge of policies and procedures as they relate to client and provider safety.
- b. Integrate safety practices into daily activities.

I meet Consistently	I need or want to improve	N/A	Please provide at least one example describing how this item of competency is achieved in your current area of practice. Attach additional pages if necessary.



**Item 7.5****Participate in quality improvement initiatives.**

Performance Indicators Are:

- a. Demonstrate accountability for quality of own practice.
- b. Show awareness of health systems, error, and client safety concepts.
- c. Work with clients and others in quality improvement initiatives.
- d. Take action on identified risks to self, client or practice setting.
- e. Advocate for change to ensure that recommended interventions are implemented and sustained.

I meet Consistently	I need or want to improve	N/A	Please provide at least one example describing how this item of competency is achieved in your current area of practice. Attach additional pages if necessary.



**Item 7.6**

**Advocate for the occupational potential, occupational performance, and occupational engagement of clients.**

Performance Indicators Are:

- a. Balance the ethical and professional issues inherent in client advocacy including altruism, autonomy, integrity, and idealism.
- b. Manage the conflict inherent between advocacy role for a client and manager of finite services and resources.
- c. Advocate appropriately for the role of occupational therapy to clients and the interprofessional team.
- d. Communicate the role and benefits of occupational therapy in occupational performance and occupational engagement.
- e. Act on identified advocacy, promotion and prevention opportunities for occupation and occupational performance with individuals for whom occupational therapy services are provided.

I meet Consistently	I need or want to improve	N/A	Please provide at least one example describing how this item of competency is achieved in your current area of practice. Attach additional pages if necessary.



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# Saskatchewan Society of Occupational Therapists

***Sample of Self-Assessment tool***



## Competency Unit 1: Assume Professional Responsibility

### Item 1

<b>I practise within the scope of professional and personal limitations and abilities.</b>	I meet Consistently	I need or want to improve	N/A	Please provide at least one example describing how this item of competency is achieved in your current area of practice. Attach additional pages if necessary.	Cross check with E.C. Performance Indicators
<b>a.</b> I can identify the scope of occupational therapy practice and how my practice fits within that scope.	•			- I am very comfortable clarifying my role, and maintain strong relationships with my co-professionals and I feel comfortable clarifying referrals or re-directing referrals to a better suited profession	1.1.1
<b>b.</b> I can explain how my practice setting impacts my scope of practice.	•			- I routinely present the role of OT during nursing student and jurisi orientation  - I am a member of a Canada wide email list-serve where OT's in my same practice area can ask for feedback and/or discuss new ideas	1.1.2 1.1.3
<b>c.</b> I keep abreast of changes that affect my practice.		•		- This list-serve is a great opportunity that I do not always make time for in my practice.	1.14
<b>d.</b> I identify my personal and professional limitations and work within these to maintain my practice at an acceptable level.		•		- Better managing my caseload size would reduce my stress and lead to more timely service for referrals I have committed to  - I have made efforts to educate myself about the different professions that I work along side	1.1.5 1.1.6
<b>e.</b> I identify and manage overlaps between my scope of practice and the roles of other professions and stakeholders.	•			- I have developed and presented an in-service to my co-workers about occupational therapy and OT's role in my practice area. I was conscious to invite discussion and have encouraged other professions to present as well	1.1.7

## Professional Development Plan

Name: \_\_\_\_\_

Date form completed: \_\_\_\_\_

The Self-Assessment Tool provides an opportunity to engage in self reflection relating to the Essential Competencies of Practice for Occupational Therapists in Canada, which were adopted by SSOT in 2004 as requirements for occupational therapists to practice in Saskatchewan.

As maintaining competency is an ongoing process, it is important to regularly

- Identify particular areas which may require further attention to enhance practice and,
- Develop and implement a plan for professional development.

The following is a tool which may facilitate this process

Item Number for Self-Assessment Tool	Goals	Strategies	Timelines	Current Status
<b>1. I practice within the scope of professional and personal limitations and abilities</b> c) I keep abreast of changes that affect my practice.	- contribute more to email list-serve discussions  - read more articles	- set time aside in dayplanner to contribute  - plan a monthly literature sharing group with co-workers	- immediately  - start within 3 months	- 03/10/09- time blocked off in day timer for next 6 months  -03/10/09- email sent to 2 co-workers for expression of interest
<b>1. I practice within the scope of professional and personal limitations and abilities</b> d) I identify my personal and professional limitation and	-Improve caseload management to reduce personal stress and provide more timely services to referrals I have accepted	- compile a caseload review at the end of each month  - develop a classification system to rate the intensity of involvement for each referral	- immediate  - within 3 months	-03/10/09 - time set aside at end of each month in day-timer  -05/25/2009 - meeting scheduled to talk with admin support about process options

work within these limitation to maintain my practice at an acceptable level		- compile monthly reviews annually and discuss with management	- annually	
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SAMPLE



# Saskatchewan Society of Occupational Therapists

## ***SSOT Non-Clinical Self-Assessment Tool***

**Competency Unit A: Assumes Professional Responsibility**

**Unit A**

**Occupational therapists assume professional responsibility for safe, ethical, and effective development, delivery, oversight and/or improvement of systems and services.**

Performance Indicators Are:

- a. Demonstrate a commitment to their work, the public and the profession.
- b. Work within scope of professional and personal limitations and abilities.
- c. Adhere to the Code of Ethics recognized by the provincial regulatory organization.
- d. Apply ethical frameworks to solve ethical situations.
- e. Demonstrate professional integrity.

I meet Consistently	I need or want to improve	N/A	Please provide at least one example describing how this item of competency is achieved in your current area of practice. Attach additional pages if necessary.



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## Competency Unit B: Thinks Critically

### Unit B

**Occupational therapists use critical reasoning and reflection approaches for safe, ethical, and effective development, delivery, oversight and/or improvement of systems and services.**

Performance Indicators Are:

- a. Demonstrate sound professional judgement and reasoning in decision-making.
- b. Engage in reflection and evaluation and integrates findings into work.

I meet Consistently	I need or want to improve	N/A	Please provide at least one example describing how this item of competency is achieved in your current area of practice. Attach additional pages if necessary.



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## Competency Unit C: Communicates and Collaborates Effectively

### Unit C

**Occupational therapists use effective communication and collaboration approaches for safe, ethical, and effective development, delivery, oversight and/or improvement of systems and services.**

Performance Indicators Are:

- a. Communicate using a timely and effective approach.
- b. Maintain confidentiality and security in the sharing, transmission, storage, and management of information.

I meet Consistently	I need or want to improve	N/A	Please provide at least one example describing how this item of competency is achieved in your current area of practice. Attach additional pages if necessary.



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## Competency Unit D: Engages in Professional Development

### Unit D

**Occupational therapists engage in professional development for safe, ethical, and effective development, delivery, oversight and/or improvement of systems and services.**

Performance Indicators Are:

- a. Use self-evaluation, new learning, and evidence in professional development.
- b. Demonstrate commitment to continuing competence.
- c. Enhance personal competence through integration of on-going learning.

I meet Consistently	I need or want to improve	N/A	Please provide at least one example describing how this item of competency is achieved in your current area of practice. Attach additional pages if necessary.



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## Competency Unit E: Manages Own Work and Advocates Within Systems

### Unit E

**Occupational therapists manage the quality of practice and advocate within systems for safe, ethical, and effective development, delivery, oversight, and/or improvement of systems and services.**

- Performance Indicators Are:
- a. Demonstrate commitment to safety.
  - b. Participate in quality improvement initiatives.

I meet Consistently	I need or want to improve	N/A	Please provide at least one example describing how this item of competency is achieved in your current area of practice. Attach additional pages if necessary.



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## ***Professional Development Plan and Outcomes (PDPO) template***



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## Continuing Competency Program • Professional Development Plan and Outcomes Clinical Form

Name: \_\_\_\_\_ Date form completed: \_\_\_\_\_

Goal __ of __	Item No. From Clinical Self-Assessment Tool	Goal (What I want to learn, specific and measurable)	Learning Strategies/Activities (What I need to do to achieve my goal)	Anticipated Completion Date (Attainable and time oriented)	Current Status
<b>Registration Year:</b> Mar. 1, 20__ to Feb. 28, 20__	<input type="checkbox"/> Item 1 point: __ <input type="checkbox"/> Item 2 point: __ <input type="checkbox"/> Item 3 point: __ <input type="checkbox"/> Item 4 point: __ <input type="checkbox"/> Item 5 point: __ <input type="checkbox"/> Item 6 point: __ <input type="checkbox"/> Item 7 point: __				<input type="checkbox"/> Completed Date: _____  <input type="checkbox"/> In Progress  <input type="checkbox"/> Omit (Reason) _____ _____
<b>Outcomes/ Impact On Practice</b> (How this leaning impacted my practice)			<b>Evidence Supporting Goal Completion/Progression</b> (Certificates, course material, books, notes, dates, etc.)		
Check all that apply and provide reflection:  <input type="checkbox"/> Validated my practice <input type="checkbox"/> Enhanced my practice <input type="checkbox"/> Expanded my knowledge <input type="checkbox"/> Increased my awareness of existing resources <input type="checkbox"/> Other _____  Please complete the attached reflection form			List evidence and location in portfolio:          If audited, evidence will be required to be submitted		



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## Outcomes/ Impact on Practice Reflection Form

Name: \_\_\_\_\_

Goal \_\_ of \_\_

**Check all that apply and provide reflection:**

- Validated my practice
- Enhanced my practice
- Expanded my knowledge
- Increased my awareness of existing resources
- Other \_\_\_\_\_

**Reflection:**



# Saskatchewan Society of Occupational Therapists

## Continuing Competency Program • Professional Development Plan and Outcomes Non-Clinical Form

Name: \_\_\_\_\_ Date form completed: \_\_\_\_\_

Goal __ of __	Item No. From Non-Clinical Self-Assessment Tool	Goal (What I want to learn, specific and measurable)	Learning Strategies/Activities (What I need to do to achieve my goal)	Anticipated Completion Date (Attainable and time oriented)	Current Status
<b>Registration Year:</b> Mar. 1, 20__ to Feb. 28, 20__	<input type="checkbox"/> Unit A <input type="checkbox"/> Unit B <input type="checkbox"/> Unit C <input type="checkbox"/> Unit D <input type="checkbox"/> Unit E				<input type="checkbox"/> Completed Date: _____ <input type="checkbox"/> In Progress <input type="checkbox"/> Omit (Reason) _____ _____
<b>Outcomes/ Impact On Practice</b> (How this leaning impacted my practice)			<b>Evidence Supporting Goal Completion/Progression</b> (Certificates, course material, books, notes, dates, etc.)		
Check all that apply and provide reflection:  <input type="checkbox"/> Validated my practice <input type="checkbox"/> Enhanced my practice <input type="checkbox"/> Expanded my knowledge <input type="checkbox"/> Increased my awareness of existing resources <input type="checkbox"/> Other _____  Please complete the attached reflection form			List evidence and location in portfolio:          If audited, evidence will be required to be submitted		



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## Outcomes/ Impact on Practice Reflection Form

Name: \_\_\_\_\_

Goal \_\_ of \_\_

Check all that apply and provide reflection:

- Validated my practice
- Enhanced my practice
- Expanded my knowledge
- Increased my awareness of existing resources
- Other \_\_\_\_\_

Reflection:



# Saskatchewan Society of Occupational Therapists

## ***Section 4: Professional Development***

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The following list indicates the type of documentation that could be included in this section. This documentation may be used to substantiate progress towards or achievement of the learning goals identified in the Professional Development Plans. Please note that there are no mandatory items. Please ensure client confidentiality is respected with all applicable documentation.

- Course certificates, curricula, outlines, pamphlets
- Documentation of discussions had with peers, colleagues, or journal clubs as a method of learning (Please refer to sample documentation)
- Reviews of policies and procedures
- Involvement in development or revision of policies and procedures
- An audit of the member's skill or ability in a certain competency
- Survey results
- A grant or research proposal
- Documentation describing involvement program development
- Documentation of peer feedback
- Agendas and minutes of meetings attended
- Samples of documentation i.e.) reports, chart notes, practice guidelines or protocols developed
- Quality improvement initiatives
- Brochures describing service, promotional materials
- Sample communications (memos, emails, letters etc.)
- Budgets or business plans
- Volunteer activities
- Outcome measures
- Performance reviews
- Lists of assessments used
- Client education material
- Reference lists of relevant research articles along with summaries of insights gained from the materials
- A summary of the information and insights gained from in-services and rounds. (Please refer to sample documentation)
- Needs assessments for programs
- Other



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## Sample of documentation for professional development activities (Optional):

The example below is an optional format for documenting your professional development activities.

**Date:** June 4, 2011

**Professional Development Activity:**

-Geriatric Grand Rounds- Occupational Therapy's Role in Capacity Assessments

**Related to Professional Development Plan?**  Yes    **Goal #:** \_\_\_\_\_     No

**What I learned:**

- OTs can provide expertise that can help determine a client's capacity.
- Best practice indicates that a number of criteria must be met before proceeding with a capacity assessment (See algorithm).
- Performance on cognitive assessments does not necessarily equate to a client's capacity.

**Impact on Practice:**

-I will use the algorithm provided at rounds to guide my clinical decisions when dealing with questions of capacity.

**Date:**

**Professional Development Activity:**

**Related to Professional Development Plan?**  Yes    **Goal #:** \_\_\_\_\_     No

**What I learned:**

**Impact on Practice:**





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## ***Section 5: Personal Additions***

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The following list indicates the type of documents /material that could be included in this section. Please note that there are no mandatory items.

- Reflective Journal
- Statements of beliefs, values or ethics
- Resources (websites, journal articles, literature reviews, forms used, frequently used assessments/outcome measures etc.)
- Feedback from clients, colleagues or supervisors
- Performance reviews
- Student evaluations
- CD-ROMs, DVDs, pictures
- Grants, scholarships or contracts awarded
- Long term goal setting
- Papers from university
- Awards or Certificates of Achievement
- Research published
- Other