

# Process for the Approval of Education Programmes

updated August 2017

**World Federation of Occupational Therapists**

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## INTRODUCTION

### **Purpose of the WFOT Approval Process**

Having an education programme that meets the World Federation of Occupational Therapists (WFOT) *Minimum Standards for the Education of Occupational Therapists* is a requirement for becoming a full member of the World Federation of Occupational Therapists (WFOT). The purpose of the WFOT approval process is to ensure that a quality assurance process is followed.

### **Purpose of Ongoing Approval**

Once a Member Organisation has full membership of the WFOT, the responsibility for ensuring that there is at least one education programme in that country that meets the WFOT *Minimum Standards for the Education of Occupational Therapists* is a requirement for maintaining that WFOT full membership. Member Organisations will meet the expectations set out on Page 22/32 in this document in order to retain their education programme approval/re-approval responsibilities and accountabilities.

### **Other Evaluation and Review Processes**

The process for gaining the WFOT approval of an education programme is distinct from accreditation, moderation, or monitoring processes imposed by other organisations, since each of these processes serve different purposes.

For example, a university may require an education programme to demonstrate that it meets institutional or governmental requirements for degree granting programmes. A registration body may require an education programme to demonstrate that it produces graduates who are eligible for registration. Other review processes may be designed to generate feedback that will contribute to the ongoing development of the education programme. In some countries, the professional Association may implement an accreditation process to ensure that programmes meet requirements in addition to the WFOT Minimum Standards.

The WFOT approval process is based on review of written documentation although other components of the overall process implemented by the national association / member organisation may include site visits or peer review.

### **Principles of the Approval Process**

The WFOT intends that the process of reviewing Programmes for the Education of Occupational Therapists against the WFOT Minimum Standards will enable programmes to demonstrate their strengths and to show how they are addressing their weaknesses. It is based on a belief that all education programmes need to keep improving what they do, in order to stay in step with changing health and societal needs, knowledge, technology, educational theory and educational funding policies.

The WFOT also intends that the approval process supports collaboration between programmes. This is important because even those programmes that exceed some Standards may not meet some of them. Through collaboration with others, programmes can receive support and generate new ideas that stimulate and guide ongoing development.

Finally, the WFOT intends that the approval process is confidential. That is, information about the education programme provided by the programme or the National Association / Member Organisation, as well as draft and final reports are treated as confidential. These documents are normally only available to the Programme Reviewers, those members of the WFOT Education Programme who are involved in the review in some way, the WFOT Education Programme

Coordinator, the WFOT Executive and the WFOT Secretariat. If an approval decision is appealed, all documentation is also made available to the WFOT Executive.

### **Contents of this Document**

This document has three parts. The nature and purpose of each part is outlined below:

#### ***Preparation of Submissions for WFOT Approval***

This part describes the process of developing documentation about an education programme to be submitted to the WFOT as part of an application for membership of the WFOT. It gives details of what to include in submissions, and how to develop the documentation.

#### ***WFOT Programme Approval Process***

This part describes how the WFOT reviews documentation about education programmes. It includes the questions that Programme Reviewers consider, and the process of giving feedback to Associations seeking membership and making the decision about approval.

#### ***National Associations Using the WFOT Approval Process***

This part describes how the WFOT Member Organisations can use the WFOT approval process to approve new programmes and to re-approve existing programmes.

## **PREPARATION OF A SUBMISSION FOR WFOT APPROVAL**

### **WFOT Roles and Responsibilities in Approving an Education Programme**

The WFOT Education Programme is responsible for deciding whether an education programme submitted as part of a WFOT full membership application meets the WFOT Minimum Standards. The decision is based on a review of submitted documentation.

The Education Programme Coordinator is responsible for appointing the WFOT Programme Reviewers, and ensuring that their review is fair and prompt. The WFOT Council will then provide the final decision for approval via vote or e-vote.

Once a programme is approved, it is eligible to be listed on the WFOT website [www.wfot.org](http://www.wfot.org)

### **National Association Roles and Responsibilities when WFOT Approval is Requested**

National Associations seeking membership of the WFOT are responsible for supporting an education programme to prepare the documentation to be submitted for review.

### **Education Programme Roles and Responsibilities when Seeking WFOT Approval**

The programme seeking approval is responsible for ensuring that the documents submitted to the WFOT conform to the requirements outlined in this document and that the content is true and accurate.

Other education programmes that agree to support a programme to complete a self-evaluation are responsible for fully understanding the *WFOT Minimum Standards for the Education of Occupational Therapists* as well as understanding the local context, so that the assistance offered is in keeping with and respectful of the local context. Preferably, the collaborative relationship is ongoing.

### **Timing and Language for Submissions**

Applications for the approval of a programme may be made prior to the first intake of students. This timing gives programmes an opportunity to respond to feedback from the approval process prior to completion of the first cohort. The WFOT strongly supports applying for approval as early as possible.

Submission documents will be in English. However, there may be circumstances that arise where it is necessary for a programme to submit documentation in another language. If this is the case it will need to be negotiated with the WFOT Education Programme Coordinator.

### **Components of a Submission**

The material that education programmes develop to submit to the WFOT will be organised into three separate documents. The WFOT intends that these documents are brief and highly focused. They should identify only the most important things that have influenced the development and delivery of the education programme and also identify the things that are expected to influence its development over time.

Programmes are advised to carefully review the *WFOT Minimum Standards for the Education of Occupational Therapists* to guide decisions about what to report.

In all cases, the source of the information that has influenced the education programme must be identified, and included in a reference list. This may include scientific literature, websites, government documents and policies, legislation. People and organisations may be included, where they are the source of knowledge of local occupations, or local health and societal issues.

### **Document One: Local and Cultural Context**

This document gives information about relevant aspects of the local context. For specific reference, consult Part Two of the Minimum Standards and information provide below.

This document will be a maximum of five pages (1750 words) plus references (no attachments).

Local Context:

1. Students entering the programme
  - Anything about the students themselves and their prior experiences that influences their readiness for study.
  - Students' educational experience and academic qualifications and professional suitability for the programme.
  - University policies and practices related to admissions and any programme exceptions.
2. Local health and societal needs
  - The health and societal needs that most influence the programme.
  - Sources of programme information, how often it is updated and by whom.
3. Local view of health-giving occupations.
4. Local health, social, disability and legal systems.
5. Local occupational therapy history.

### **Document Two: Curriculum**

The curriculum document addresses:

- Educators
- Philosophy and purpose of the programme
- The curriculum content and sequence
- Educational methods
- Practice placement (Fieldwork)
- Educational resources

See part 3 of the *WFOT Minimum Standards for the Education of Occupational Therapists* for details of the expected content. In addition, please note the following:

1. Part 2 of the *WFOT Minimum Standards for the Education of Occupational Therapists* gives a detailed description of the essential knowledge, skills and attitudes that graduates are expected to have. It is expected that the statement in the curriculum will be an overview of this information.
2. The philosophy statement is intended to be a statement of the programme's philosophy about people as occupational beings, the occupational challenges people face, and how to enable occupation. Note that the curriculum should also include educational philosophies.
3. The purpose statement addresses the societal purpose of occupational therapy within the local context. It will identify whether the purpose of occupational therapy in context demands individual, community, group, or population approaches to health and wellbeing.
4. A statement should be included under Educational Methods regarding assessments and evaluation of students' learning.

It may also be necessary to append a summary of the quality improvement systems that are in place, as these are likely to be documented in the educational institute's policies and processes rather than in the curriculum. Information about the function or responsibilities of the individuals and groups involved is required, along with information about who has responsibility for the various quality improvement processes and their frequency. Where processes involve an outside expert, an outline of how experts are appointed is required. Where a committee, board, panel, or another group is involved, information

about how the group is composed and its function is required. Examples might include a group that reviews the curriculum, and processes that address: developing policies and procedures, approval of examination results, an Advisory Committee, institutional monitoring and moderation, peer review, and student feedback.

### **Document Three: Self Evaluation**

The third document is intended to stimulate programmes to be critical in a positive way, because it gives programmes an opportunity to identify their strengths as well as any gaps in relation to the WFOT Minimum Standards. When a previous review has been completed and changes identified, there needs to be inclusion of information about what has been done to correct these gaps/required changes before the current review is reported; or if they have not been addressed, why not and what are the plans for moving ahead?

In addition, programmes are invited to explain what they are doing to enable the programme to meet the WFOT Minimum Standards in the future. Programmes also have an opportunity to identify any deliberate variations from the WFOT Minimum Standards and to give an educational justification for such variations.

This document will be a maximum of ten pages (3500 words) plus references.

### **Submission of Documents to WFOT**

Submission to the WFOT is a collaborative process between the new programme and the National Association / Member Organisation. Documents are submitted to the WFOT through the National Association / Member Organisation that signs the covering letter. If there is no National Association in the country the application should be sent by email directly to the WFOT Secretariat.

Education programmes are advised to contact the WFOT Education Programme Coordinator if they would like assistance with preparing their submission. Contact details are available on the WFOT website at [www.wfot.org](http://www.wfot.org)

Once all documentation has been accurately submitted to the WFOT Secretariat, the overall review process is expected to take 4 months or up to 6 months if further information is required however the vote by Council may extend that timeline.

## WFOT PROGRAMME APPROVAL PROCESS

This document describes the process for documentary review when submitting to the WFOT concerning an education programme seeking the WFOT approval. It includes information about:

- Who carries out the approval process
- What Programme Reviewers are looking for
- Information contained within the Reviewers' Report

Qualifications for Programme Reviewers:

- Individual members of the WFOT.
- Experienced educators.
- Have read and understood the WFOT Minimum Standards for the Education of Occupational Therapists and have access to a copy of the WFOT Minimum Standards while they are conducting the review.
- Have no conflicts of interest.

Reviewers are people who have experience in:

- Curriculum design, development and delivery.
- Occupational therapy foundational knowledge, skills and attributes.

The reviewer database, held by the Secretariat will include at least two individuals from each region who have experience working in these regions. Prospective reviewers forward their curriculum vitae to the Programme Coordinator. It is the Programme Coordinator's responsibility to ensure that these criteria are met.

### The Review Process

The role of the WFOT Programme Reviewers is to review programmes against the WFOT Minimum Standards. That means identifying whether the programme will produce occupational therapists and where it:

- Meets or exceeds the Standards.
- Varies from the Standards but has sound educational reasons for doing so that do not compromise the graduate competencies.
- Does not meet the Standards but is effectively taking action to improve those aspects of the education programme.
- Does not meet the Standards and needs to do more to address that aspect of the education programme.

In carrying out their role, Programme Reviewers are required to:

- Review programme documentation in an unbiased manner.
- Highlight examples of good practice and innovative developments.
- Seek more information if there are aspects of the programme that require clarification.
- Provide constructive criticism and recommendations.

### Time Frames

Provided all required documentation is submitted with the approval request, the maximum time between submission and approval being granted will be six months; council formal approval may extend that timeline due to scheduling of Council Meeting or e-vote.

**Figure 1: Time Frames Table**

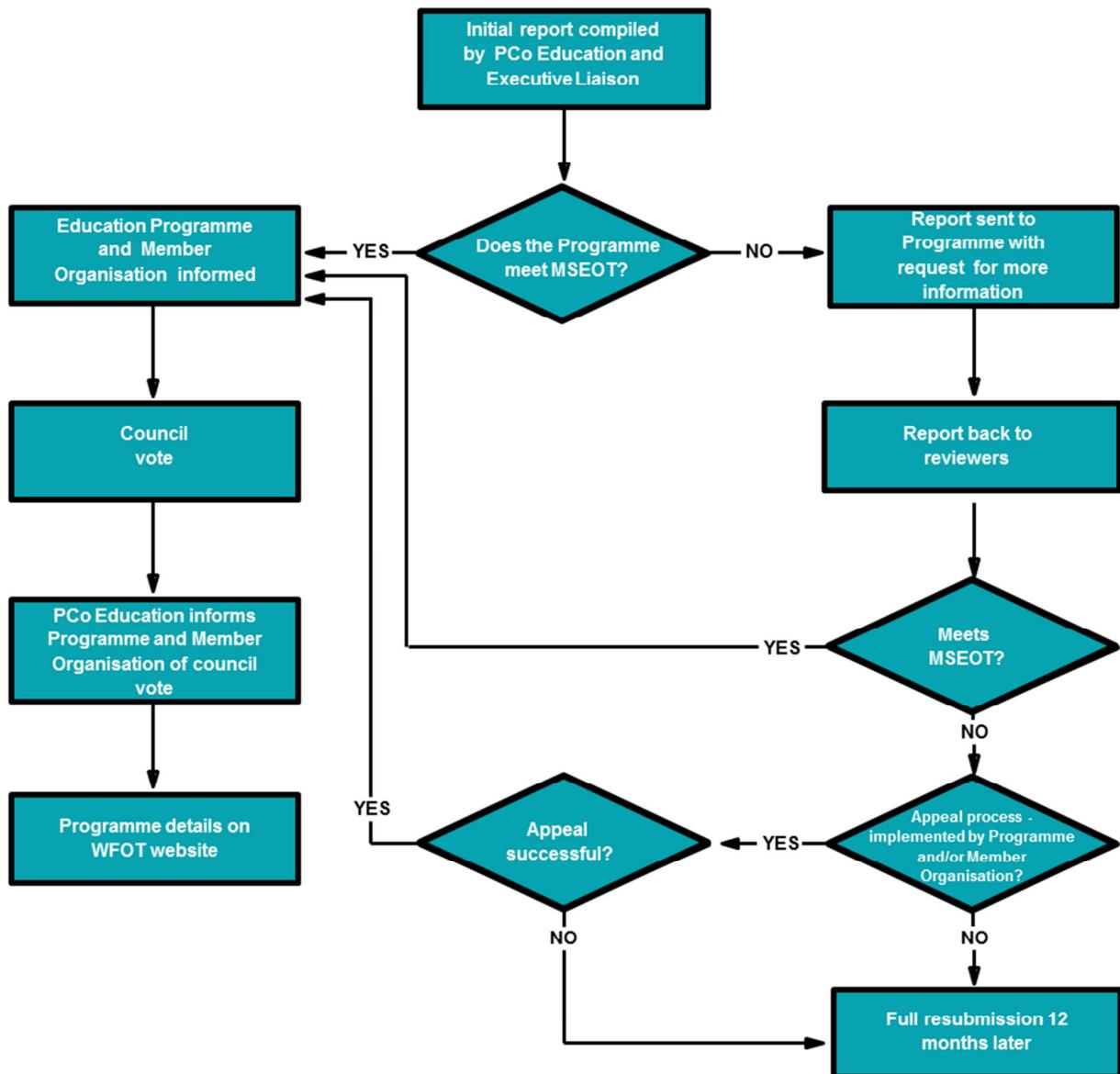
<b>A completed programme submission received and the 6 months' process begins (4 months if no further information is requested by Reviewers) as follows:</b>			
<b>Time</b>	<b>Actions</b>		<b>Most Responsible Person (MRP)</b>
3 weeks	Reviewers invited (two persons, one with working knowledge of the geographic region)	Reviewers agree to timeline and are appointed	PCo Education/ Vice President
2½ months	Curriculum reviewed Reviewers responsible for informing the PCo Education if the deadline will not be met	PCo Education in regular contact with reviewers  New deadline negotiated if required	Reviewers PCo Education
2 weeks	PCo Education reviews both reviewers' reports	PCo Education synthesizes recommendations	PCo Education
1 week	Vice President reviews report(s) and recommendations Additional edits made as needed	Also refer to diagram 2 regarding Approval decision making process Report sent to Education Programme with a copy to Member Organisation with timeline for returning their response to the Secretariat if extra information is requested	Vice President  Member Organisation Secretariat
1 month	Education Programme's time to respond to requests for extra information	Education programme submits extra requested documents/information	Education Programme Member Organisation
2 weeks	Extra information reviewed by initial reviewers and PCo Education		Reviewers PCo Education
2 weeks	Final report complied. Revised decision provided to the Executive and the Member Organisation	Provisional approval sent to Member Organisation and received by end of 6 month period	PCo Education / Vice President
<b>Recommendation: goes to e-vote or to a Council Meeting, depending on the timing of the next Council Meeting</b>			

## The Programme Review Process

Judgement is required when reviewing an education programme to determine whether it meets the *WFOT Minimum Standards for the Education of Occupational Therapists*. The Programme Reviewers should consider the programme as a whole rather than looking for the presence or absence of every small detail mentioned in the WFOT Minimum Standards.

Programme Reviewers are advised to read the whole submission, and then to consider the questions below. Relevant parts of the Minimum Standards document are referred to within this description to help reviewers identify any specific part of the Minimum Standards required:

1. Will the programme produce occupational therapists?
  - Does the programme philosophy focus on occupation?
  - Will the graduates be able to address the occupational needs of individuals, groups, communities and populations in the local context?
2. Will the programme produce occupational therapists to meet the needs of the local population?
  - Is there a good match between the knowledge, skills and attitudes of graduates and the local health and societal needs?
  - Consider whether the education programme adequately supports students to develop the graduate competencies (part 3)?
3. Do the assessment methods used in the programme support development of these competencies?
4. Does the programme incorporate international occupational therapy knowledge?
5. Will the programme produce graduates who are able to:
  - Retain and apply information?
  - Search for and manage information?
  - Demonstrate enhanced critical thinking and clinical reasoning skills?
  - Promote teamwork?
6. Does the programme have sufficient, effective quality improvement mechanisms?
  - Internally, to ensure the education programme improves over time (part 3)
  - Externally, to gather and respond to information about graduate's effectiveness in meeting local health needs?
7. Is justification provided for any deviations from the WFOT Minimum Standards?
8. Where the programme does not yet meet the WFOT Minimum Standards, are the planned actions adequate and appropriate?
9. Are there examples of good practice and innovation?



**Figure 2: The Programme Review Process**

If the Programme Reviewers are confident that the Programme substantially meets the WFOT Minimum Standards, they will prepare their report and forward to the Education Programme Coordinator.

If the Programme Reviewers agree that they require more information in order to be certain about whether the programme substantially meets the WFOT Minimum Standards or not, they will need to decide what they are most concerned about. Then they may ask the programme to submit specific supplementary information or reference material. Alternatively, the Programme Reviewers might ask the programme to decide what further information to submit to address specific concerns.

## **Resubmission and Appeal Processes**

If the Education Programme is not approved, the resubmission process is that the programme will make adjustments and prepare a new submission for approval of the programme at a later date to be mutually determined.

If, however, the National Association / Member Organisation wishes to appeal the approval decision, a request for reconsideration can be submitted within two months to the WFOT Executive Director. The request must outline the reason why the Association considers the decision to be wrong. The Executive Director will, within 2 months of receiving such a request, coordinate a review of all documentation in relation to the evaluation in conjunction with the WFOT Education Programme Area. The review will involve a third Programme Reviewer who was not involved in the original review, independently reviewing the documents submitted by the education programme and National Association / Member Organisation. This reviewer will not have access to the previous Programme Review reports.

Once the new report is received, the WFOT Executive will review all reports and the request for reconsideration and decide whether to uphold or revoke the approval decision.

## **Entry on the WFOT Approved Entry level Education Programmes List**

Following the Council vote to formally approve the Programme, the programme will be eligible for publication on the WFOT website. The year of approval entered into the database is the year in which the Education Programme Coordinator wrote their recommendation, not the year in which the WFOT Executive considered the recommendation (if these are different).

## **Re-Approval and Approval of Other Programmes**

Once the first education programme of a country has been reviewed and approved by the WFOT, the National Association / Member Organisation is able to apply for Full Membership. The full membership status establishes the National Association as a delegated Member Organisation and thus the WFOT authority to review and approve other education programmes in the country. It is also the responsibility of the Member Organisation to re-approve all education programmes in the country.

## MEMBER ORGANISATIONS' APPROVAL AND RE-APPROVAL PROCESS

Once the first programme has been approved and the WFOT full membership is granted, the Member Organisation takes responsibility for:

- The WFOT approval of new programmes against the WFOT Minimum Standards.
- Ongoing re-approval of existing education programmes against the WFOT Minimum Standards.
- Reporting the outcome of approvals and re-approvals to the WFOT Secretariat.

To assist the WFOT to maintain up-to-date records, Member Organisations will receive scheduled reminders to review education programmes listed on the WFOT website.

The WFOT expects that Member Organisations will:

- Have a description of their approval and re-approval process available.
- Include an appeal process in their approval and re-approval process.
- Appoint experienced educators to be the Programme Reviewers who carry out approvals and re-approvals. They may or may not be members of the national associations' executive group or council, or individual members of the WFOT, but will need access to the WFOT *Minimum Standards for the Education of Occupational Therapists*.

If education programmes have questions or concerns about the approval, re-approval or appeal processes in their country, they may approach the WFOT Education Programme Coordinator who may approach the Member Organisation to assist with identification and resolution of the issues. The WFOT Executive will be kept informed of such activities.

### Using the WFOT Approval Process

New WFOT Member Organisations should adopt the WFOT approval process in order to remain congruent with other documents and descriptors. However, Associations may develop their own process for evaluating whether education programmes meet the WFOT Minimum Standards. Member Organisations may also choose to collaborate with other WFOT members or to work in regional groups or to contract another body to complete approvals.

The approval process is pictured in "Figure 1" as above and outlined in detail in the WFOT Programme Approval document.

If a programme is reviewed earlier than scheduled, then the original next scheduled review date still stands.

### Frequency of Ongoing Re-Approvals

The WFOT requires that programmes are re-approved every five (5) or seven (7) years. Whether a five or seven year cycle applies for a particular programme will be determined by the Member Organisation, based on the length of the programme.

Course Duration	Approval Period
2 years	5 years
2.5 years	5 years
3 years	5 years
3.5 years	5 years
4 years	7 years
4.5 years	7 years
5 years	7 years

### **Communication between Member Organisations and Programmes**

To assist programmes with the approval and re-approval process, the WFOT Member Organisations may develop a "master" list of "local context" elements as a facilitator for reporting local and cultural context.

Where a programme is substantially changed after it has been approved or re-approved, education programmes are required to communicate this to the Member Organisation who, in turn, will inform the WFOT.

**REVIEW FORM**

# Review of Occupational Therapy Education Programme

Name of Programme/ Country:	
Reviewer/Country:	

 Approval (Initial)

 Re-approval (Year of Last Review: \_\_\_\_\_)

**Document 1: Local and Cultural Context**
**I. An overview of the local context**

	Yes	No	Comments/Recommendations
<b><i>1. Does the document provide a comprehensive and accurate picture of the local context and its relevance to occupational therapy?</i></b>	<input type="checkbox"/>	<input type="checkbox"/>	
<b><i>2. Does it cover the following aspects of the local practice that are relevant to occupational therapy practice?</i></b>			
<i>Students entering the programme</i>	<input type="checkbox"/>	<input type="checkbox"/>	
<i>Local view of health-giving occupations</i>	<input type="checkbox"/>	<input type="checkbox"/>	
<i>Local health and societal needs</i>	<input type="checkbox"/>	<input type="checkbox"/>	
<i>Local health and wellbeing, disability and legal systems and services</i>	<input type="checkbox"/>	<input type="checkbox"/>	
<i>Local occupational therapy history</i>	<input type="checkbox"/>	<input type="checkbox"/>	

## Document 2: The Curriculum

In reviewing the headings below relating to the Minimum Standards, please include constructive criticism and recommendations and consider the following:

- The congruence between the local context, the education programme, and the knowledge, skills and attitudes of graduates;
- The depth and breadth of that aspect of the programme;
- The relevance or fit within the local context;
- The consistency with expectations of the international occupational therapy community, as well as international thinking about health, welfare and educational practice; and
- Mechanisms for continual quality improvement of that aspect of the programme.

A. Philosophy and Purpose of the Programme

B. Curriculum Content and Sequence

C. Educational Methods

D. Practice Placement (Fieldwork)

E. Educational Facilities and Resources

F. Educators

## Document 3: Summative Evaluation

1. Will the programme produce occupational therapists?			
	Yes	No	Comments/Recommendations
<i>i) Does the programme focus on occupation?</i>	<input type="checkbox"/>	<input type="checkbox"/>	
<i>ii) Does the purpose of the programme focus on occupational needs?</i>	<input type="checkbox"/>	<input type="checkbox"/>	
<i>iii) Will the graduates be able to address the occupational needs of individuals, groups, communities or populations in that context?</i>	<input type="checkbox"/>	<input type="checkbox"/>	

<b>2. Will the programme produce occupational therapists to meet the needs of the local population?</b>			
	Yes	No	Comments/Recommendations
<i>i) Is there a good match between the knowledge, skills and attitudes of graduates and the local health and societal needs?</i>	<input type="checkbox"/>	<input type="checkbox"/>	
<i>ii) Does the education programme adequately support students to develop the graduate competencies?</i>	<input type="checkbox"/>	<input type="checkbox"/>	
<i>iii) Do the assessment methods used in the programme support development of these competencies?</i>	<input type="checkbox"/>	<input type="checkbox"/>	
<i>iv) Has the programme demonstrated sufficient knowledge of its local context?</i>	<input type="checkbox"/>	<input type="checkbox"/>	
<i>v) Does the programme fit the local context?</i>	<input type="checkbox"/>	<input type="checkbox"/>	
<i>vi) Does the programme incorporate international occupational therapy knowledge?</i>	<input type="checkbox"/>	<input type="checkbox"/>	

<b>3. Are you confident that the programme will produce graduates who are able to:</b>			
	Yes	No	Comments/Recommendations
<i>i) Retain and apply information?</i>	<input type="checkbox"/>	<input type="checkbox"/>	
<i>ii) Search for and manage information?</i>	<input type="checkbox"/>	<input type="checkbox"/>	
<i>iii) Demonstrate enhanced critical thinking and clinical reasoning skills?</i>	<input type="checkbox"/>	<input type="checkbox"/>	
<i>iv) Promote teamwork?</i>	<input type="checkbox"/>	<input type="checkbox"/>	

4. Does the programme have sufficient, effective quality improvement mechanisms?			
	Yes	No	Comments/Recommendations
<i>i) Internally, to ensure the education programme improves over time?</i>	<input type="checkbox"/>	<input type="checkbox"/>	
<i>ii) Externally, to gather and respond to information about graduates' effectiveness in meeting local health needs?</i>	<input type="checkbox"/>	<input type="checkbox"/>	

<b>5. If applicable; Is justification provided for any deviations from the Minimum Standards</b>	<input type="checkbox"/>	<input type="checkbox"/>	
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<b>6. If applicable; where the programme does not yet meet the Minimum Standards, are the planned actions adequate and appropriate? (Are you confident that the actions described will be effective and timely, and result in graduates competent to practice in that context?)</b>	<input type="checkbox"/>	<input type="checkbox"/>	
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**Please provide any examples of good practice and innovation**

**General Comments (anything not previously mentioned if needed):**

**Recommendation:**

- Grant approval/ re-approval
- Return to programme for minor revisions/clarifications then approve
- Deny approval/re-approval

### **Declaration of Absence of Conflict of Interest**

I, have voluntarily reviewed and assessed the above named curriculum on behalf of the World Federation of Occupational Therapists, and hereby declare that I have no conflicts of interest, real or perceived, with undertaking this review. I have no personal, profesional, organisational, or political loyaltites or any other interests or biases for or against the programme I have reviewed.

Name:

Signature:

Date: