

## GUIDELINES FOR MENTORING

There are 2 ways mentoring can be used to accrue Professional Development Units (PDU). They are:

ID# 9 Mentoring an OT colleague or other professional to improve skills of the protégé, including role as a disciplinary monitor (mentor must be currently certified). 2 hours = 1 PDU (maximum of 18 units per renewal cycle)

ID# 15 Receiving mentoring from a currently certified occupational therapist or other profession in good standing to improve the skills of the protégé. 2 hours = 1 PDU (maximum of 18 units per renewal cycle)

The mentor and mentee engage in a one-to-one relationship where the mentor's role is to teach the mentee a particular skill or skill set.

Verification Documentation – goals and objectives and analysis of mentee performance

### Example:

Topic: *Learning About Developing OT Services in New and Emerging Practice Areas*

Mentor: Julia Berry, OTR, owner of a private practice providing services to several community agencies

Mentee: Sandy Stevens, OTR, currently working in in-patient services and would like to move into community-based practice in the future

Goals of Mentee, to:

- Understand how to identify potential for occupational therapy services in the community
- Review skills required for effective leadership in developing new practice services
- Appreciate key components of conducting a community needs assessment
- Learn how to write goals/objectives/outcome reports for community-based services

Mentor's Plan of Mentorship/Instruction

Meet 1 hour per week to discuss & share specific case examples and resources on the following:

1. Overview of the practice environment as a community system including frames of reference and models of practice
2. Ideas for community interventions – prevention/promotion/wellness
3. Steps in analyzing trends and forecasting need for occupational therapy services
4. Effective communication skills – leadership/negotiating/marketing/managing
5. Process of profiling and conducting a needs assessment
6. Developing goals and objectives based on results of needs assessment
7. Outcomes and evaluations
8. Consideration of environment/resources/cost/budget
9. Review documentation and reimbursement issues
10. Complete quiz and mentoring goal checklist. Set up shadowing opportunities

Upon Completion of goals:

### Evaluation of Mentee

*I have provided mentoring for Sandy in the area of developing occupational therapy services in new and emerging community-based practice areas. We met for one hour per week for 10 weeks. Sandy identified 4 specific goals that she wished to achieve during our meetings. I developed a meeting schedule to guide our discussions covering these goals and included many examples from my own practice area to illustrate the points raised. Sandy was proactive in our discussions, contributing with examples and from information she had read. She demonstrated understanding of the process of identifying potential markets and factors involved in carrying out an effective needs assessment via successful completion of the quiz and mentoring goal checklist. In order to increase her knowledge and understanding in this area, I would recommend that Sandy has the opportunity to shadow me as I conduct some of these activities in the community.*

*Julia Berry, OTR*

### Mentee's Report

*I have met with Julia for one hour per week for ten weeks with the aim of learning about how to develop occupational therapy services in new and emerging community practice areas. Julia has her own private practice and has developed a number of contracts with community-based agencies. This is an area of practice I would like to move into at some time in the future. Although I have done quite a bit of reading about community-based practice, mentoring with Julia has exposed me to specific examples and experiences based on real-life practice examples. I have completed all the goals I set at the start of our meetings and feel the next step is for me to spend time shadowing with Julia conducting a community-based needs assessment.*

*Sandy Stevens, OTR*

**NAME OF MENTEE:** \_\_\_\_\_

**NAME OF MENTOR:** \_\_\_\_\_

**MENTORING OBJECTIVES (To be developed in conjunction with Mentee, written in a format that is outcome based)**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_
7. \_\_\_\_\_
8. \_\_\_\_\_

**PLAN OF INSTRUCTION (in addition to hands on, readings, reports, presentations for Mentee)**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_
7. \_\_\_\_\_
8. \_\_\_\_\_

## DATES AND TIMES RECORDS

DATE	TIME	ACTIVITY

**EVALUATION OF MENTEE**

**BY MENTOR (Include attainment of skills and level of proficiency. Verbalizes VS demonstrates skills can use the self assessment tool and scale):**

**EVALUATION OF MENTOR  
BY MENTEE:**

**MENTOR REVIEW AND IMPROVEMENT PLAN  
FOR FUTURE MENTORSHIPS:**